Results

EuroTrak Germany 2022

1. Introduction
2. Market overview
3. Analysis of hearing aid owners
4. Analysis of hearing impaired non-owners
5. Appendix
If you speak German, please go to

initiative-hörgesundheit.de

for a more in-depth analysis of the findings.
Summary
1. Introduction

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

Sample sizes:
- Representative sample (sample 1): n=13’556 people
- Hearing impaired (sample 2):
  - HA owners: n=702 people
  - Hearing impaired non-owners: n=611 people
Summary
2. Market overview

- **Stated hearing loss prevalence**
  - Total: 11.1%, 18+: 13.0% (2018: 12.2%, 18+: 14.1%).
  - Hearing Tests: 43% (2018: 45%) had a hearing test in the last 5 years, most tests done by ENTs.

- **Hearing aid adoption rate (HA penetration)**
  - 41.1% of those with self declared HL (2018: 36.9%).
  - 4.6% of total population (2018: 4.5%).
  - 74% 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.
  - 58% got hearing aids recommended from the ENT or family doctor (drop out rate=29% / 2018: 33%).
  - 68% of the GP consultations referred to an ENT, 41% to an Audiologist (2018: 33%). 8% recommended no action.
  - 37% of ENT consultations referred to an Audiologist, 43% recommended to get a hearing aid, 32% recommended no action.

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

3. Analysis of hearing aid owners

- Hearing aid ownership, usage and accessories
  - 53% of the currently owned HAs were bought in 2019 or later.
  - The average age of the currently owned HAs is 3.3 years.
  - The median age of hearing aids before replacement is 6 years.
  - On average, HAs are worn 8.9 hours a day.
  - RIC is the most often purchased type of HA.
  - Cochlear Implants: <1% of HA owners have a CI. 18% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
  - 25% of the HA owners use a hearing aid app, 76% of those are satisfied with it.
  - 20% of the hearing aid owners use some kind of accessory for better speech understanding.
  - 13% of the HAs are (to the knowledge of the owners) equipped with Telecoil. Main usage of Telecoil with phone.

- Importance of listening situations and satisfaction with HAs
  - 83% of the hearing aid owners say their hearing aid works better than or as expected
  - 77% of the HA owners are satisfied with their HAs (2018: 76%).
  - 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, watching TV with others, 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, sense of safety, ability to participate in group activities and social life improve with hearing aids.
  - 96% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
  - 71% of the hearing aid owners feel more confident moving in a city since wearing hearing aids. Also a majority of the hearing aid owners feel more confident when driving a car / riding a bicycle on their own, since wearing hearing aids.
Summary
4. Analysis of hearing impaired non-owners

- Reasons not to own/use HAs
  - The main reasons for not using hearing aids are that they think that hearing aids are uncomfortable, they hear well enough in most situations, hearing loss is not severe enough, hearing aids don’t restore hearing to normal, they do not work well in noisy situations and the ENT’s opinion.
  - 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
  - 74% 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 38% say they are never made fun of because of their hearing loss).
  - The most important triggers to get hearing aids are worsening hearing loss, followed by the ENT and audiologist/spouse.
Detailed Results: Roadmap

1. Introduction
   - Organisation of EuroTrak Germany 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)
   - 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 Germany 2022

**Organisation**
- Principal of the project EuroTrak Germany 2022 is EHIMA.
- Anovum Zurich developed the concept of EuroTrak Germany, 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 Germany/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 \( n=13'556 \) people based on census data.

**Step 2: Target population interviews**

Objective: Details about satisfaction with hearing aids and reasons for non-adoptions

Process:
1. Main questionnaires: Owners and hearing impaired non-owners
2. Balancing through weighting according to representative screening interviews
3. Resulting sample: \( n=702 \) hearing aid owners and \( n=611 \) 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>
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</thead>
<tbody>
<tr>
<td>&lt;= 14</td>
<td>0.1%</td>
<td>6.8%</td>
<td>6.6%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>0.1%</td>
<td>5.9%</td>
<td>5.5%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>0.1%</td>
<td>6.0%</td>
<td>5.8%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.2%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>0.1%</td>
<td>6.2%</td>
<td>6.1%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>0.2%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>0.1%</td>
<td>6.7%</td>
<td>7.1%</td>
<td>0.5%</td>
<td>0.3%</td>
<td>0.3%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>0.4%</td>
<td>6.0%</td>
<td>7.1%</td>
<td>0.5%</td>
<td>0.3%</td>
<td>0.3%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>0.8%</td>
<td>6.2%</td>
<td>5.1%</td>
<td>0.6%</td>
<td>0.4%</td>
<td>0.4%</td>
</tr>
<tr>
<td>74+</td>
<td>2.8%</td>
<td>4.5%</td>
<td>1.0%</td>
<td>1.1%</td>
<td>1.1%</td>
<td>1.1%</td>
</tr>
</tbody>
</table>
Hearing loss prevalence in Germany
Self declared hearing loss

% hearing loss prevalence

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

- 2021 (n=13'556)
- 2018 (n=13'583)
- 2015 (n=13'775)
- 2012 (n=13'922)
- 2009 (n=14'185)
Hearing aid adoption rate: 41% of hearing impaired have hearing aid(s), 74% of them have binaural treatment.
Overview hearing loss prevalence and hearing aid adoption

- Hearing impaired (stated)
- Adoption (% of population)
- Adoption (% of stated impaired)
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>Ears impaired (stated)</th>
<th>HA-Non-owner n=611</th>
<th>HA Owner n=702</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unilateral loss</td>
<td>35%</td>
<td>16%</td>
<td>26%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>65%</td>
<td>84%</td>
<td>50%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Perceived loss</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mild</td>
<td>40%</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>Moderate</td>
<td>50%</td>
<td>57%</td>
<td>45%</td>
</tr>
<tr>
<td>Severe</td>
<td>8%</td>
<td>23%</td>
<td>70%*</td>
</tr>
<tr>
<td>Profound</td>
<td>2%</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: 43% had a hearing test in the last 5 years (2018: 45%), most tests done by ENTs

Have you ever taken a hearing test?
- Yes, in the last 12 months: 18%
- Yes, in the last 1-5 years: 34%
- Yes, more than 5 years ago: 25%
- No, never: 24%

Where/how was your hearing tested?
- Ear doctor (ENT): 58%
- Family doctor: 22%
- Audiologist: 21%
- Online test, smartphone app: 3%
- Other: 6%
- DNK: 2%

Base=10'353

Base= 4'356
Have you ever taken a hearing test?

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Yes, in the last 12 months</th>
<th>Yes, in the last 1-5 years</th>
<th>Yes, more than 5 years ago</th>
<th>No, never</th>
</tr>
</thead>
<tbody>
<tr>
<td>71 years or older</td>
<td>27%</td>
<td>24%</td>
<td>20%</td>
<td>28%</td>
</tr>
<tr>
<td>61-70 years old</td>
<td>18%</td>
<td>23%</td>
<td>25%</td>
<td>34%</td>
</tr>
<tr>
<td>50-60 years old</td>
<td>14%</td>
<td>24%</td>
<td>29%</td>
<td>33%</td>
</tr>
<tr>
<td>up to 49 years old</td>
<td>17%</td>
<td>25%</td>
<td>22%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Base=10’353

Hearing Tests by age group: 27% of the people over 70 have been tested within the last 12 months - but only 14% of the 50-60 y.o.
The route to the hearing aid:
Sources of information and drop-out rates
Doctors/HCPs are the most important sources of information and therefore the major gatekeepers.

Where did you gather information about hearing aids?

<table>
<thead>
<tr>
<th>Information Source</th>
<th>Hearing loss Total (n=1'313)</th>
<th>Hearing aid (n=702)</th>
<th>Hearing loss but no hearing aid (n=611)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family doctor, ear doctor (ENT), Audiologist</td>
<td>47%</td>
<td>30%</td>
<td>71%</td>
</tr>
<tr>
<td>Internet research combined</td>
<td>23%</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Conversations with friends, relatives already fitted with a hearing aid</td>
<td>21%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Internet research: websites of hearing aids manufacturers</td>
<td>14%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Internet research: websites of hearing aid clinics</td>
<td>10%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Internet research: other websites, google…</td>
<td>10%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Articles in magazines or newspapers</td>
<td>8%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Print ads received in your mailbox</td>
<td>5%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>I did not gather information about hearing aids</td>
<td>4%</td>
<td>27%</td>
<td>43%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Hearing loss Total (n=1’313)
Hearing aid (n=702)
Hearing loss but no hearing aid (n=611)
Of those who discussed the hearing loss with a doctor, 70% 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)?

- Ear, Nose and Throat specialist (ENT): 70%
- Your family doctor: 30%

Total n= 1'046

- Hearing aid (n=635): 67%
- Hearing loss but no hearing aid (n=411): 73%

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The route to the hearing aid

- **Impaired**: 100%
- **ENT/Doctor**: 81%
- **Recommend**: 58%
- **Discussed hearing loss with audiologist**: 55%
- **Positive advice audiologist**: 49%
- **Bought hearing aid**: 41%

**Drop out**:
- 2018: 19%
- **2018 (Total)**: 33%
- **2018 (Total)**: 29%

n=1'313

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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=1’313
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>2022 n=1'313</th>
<th>2018 n=1'302</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total hearing impaired</td>
<td>45%</td>
<td>54%</td>
</tr>
<tr>
<td>HA owner</td>
<td>59%</td>
<td>67%</td>
</tr>
<tr>
<td>Hearing impaired non-owners</td>
<td>35%</td>
<td>46%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

**HA owner (n=xxx)**
- Referred to an ear doctor (ENT): 75%
- Referred to an Audiologist: 50%
- Recommended to get a hearing aid: 19%
- Recommended no further action: 0%

**Impaired non-owner (n=xxx)**
- Referred to an ear doctor (ENT): 68%
- Referred to an Audiologist: 41%
- Recommended to get a hearing aid: 16%
- Recommended no further action: 8%
The route to the hearing aid: ENT
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

<table>
<thead>
<tr>
<th>Scenario</th>
<th>2022</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total hearing impaired</td>
<td>76%</td>
<td>77%</td>
</tr>
<tr>
<td>HA owner</td>
<td>92%</td>
<td>90%</td>
</tr>
<tr>
<td>Hearing impaired non-owners</td>
<td>66%</td>
<td>69%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

**HA owner (n=xxx)**
- Did prescribe a hearing aid: 77%
- Referred to an Audiologist: 45%
- Recommended no further action: 1%

**Impaired non-owner (n=xxx)**
- Did prescribe a hearing aid: 9%
- Referred to an Audiologist: 30%
- Recommended no further action: 62%
The route to the hearing aid: Audiologist
Have you ever discussed your hearing problem with an Audiologist?

% Discussed with Audiologist

- Total hearing impaired: 55% discussed, 53% did not discuss
- HA owner: 92% discussed, 92% did not discuss
- Hearing impaired non-owners: 29% discussed, 29% did not discuss

What did he/she recommend?

- HA owner (n=649):
  - Recommended to get a hearing aid: 99%
  - Recommended not to get a hearing aid: 1%

- Impaired non-owner (n=174):
  - Recommended to get a hearing aid: 68%
  - Recommended not to get a hearing aid: 32%
Recommendations by profession

- **GP**: 68% Referred to an ear doctor (ENT), 41% Referred to an Audiologist, 16% Recommended to get a hearing aid, 8% Recommended no further action
- **ENT**: 37% Referred to an ear doctor (ENT), 43% Referred to an Audiologist, 32% Recommended to get a hearing aid, 8% Recommended no further action
- **Audiologist**: 89% Referred to an Audiologist, 11% Recommended to get a hearing aid, 8% Recommended no further action

2018: 33% Referred to an ear doctor (ENT)
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: 25%
- Of significant use: 70%

n=197
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.
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
- Hearing aid: 6% very high, 62% medium, 32% very low
- Top 50% hearing loss, no hearing aid: 12% very high, 70% medium, 18% very low

Base: hearing aid n=514 / top 50% HL, no hearing aid =130

*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=130)
  - No: 40%
  - Yes: 60%

- Hearing aid (n=514)
  - No: 60%
  - Yes: 40%
34% of all hearing impaired think that hearing loss could be linked to depression

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

- Depression: 34%
- Sleeping disorder: 26%
- High blood pressure: 21%
- Dementia: 16%
- Back problems: 11%
- Poor eyesight: 10%
- Diabetes: 10%

Hearing loss is not linked to any of those health issues: 43%

Hearing impaired, n=1'313
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>1% 3% 70%*</td>
</tr>
<tr>
<td>Severe</td>
<td>(14%)</td>
<td>4% 10%</td>
</tr>
<tr>
<td>Moderate</td>
<td>(53%)</td>
<td>29% 24% 45%</td>
</tr>
<tr>
<td>Mild</td>
<td>(28%)</td>
<td>24% 5% 17%</td>
</tr>
</tbody>
</table>

Sums can differ from 100% due to rounding

* combined “severe” and “profound” because n is too small

n=1'313

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53% 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: 3.4 years
2018: 2.9 years

Type of HA

- Behind the ear hearing aid with speaker in the ear connected by a thin wire: 47.0%
- Behind the ear hearing aid with a tube and earpiece: 30.8%
- In the ear hearing aid: 19.2%
- Cochlear Implant: 0.5%
- Other: 0.9%

HA-owner, n=702
69% of the population in Germany have never heard of Cochlear Implants. 18% 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?

- 7% Yes, know it well
- 24% Yes, know it a little
- 69% No, never heard of it

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

- 18% Yes
- 80% No
- 2% don't know

n=208 (HA owners with severe/profound HL)
Hearing aids are used for 6 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: 36%
- No: 64%

**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 year: 27%
- 2 years: 27%
- 3 years: 26%
- 4-6 years: 11%
- more than 6 years: 9%

**n=402**

**HA non owners:**
How many years had passed since you became aware of your hearing loss?

- 1 year: 16%
- 2 years: 21%
- 3 years: 15%
- 4-6 years: 20%
- more than 6 years: 27%

**n=561**

**Age of HA before it has been replaced:**
- 2022: 6 years (median)
- 2018: 6 years (median)
59% 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?

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: 66%
- Better mental/emotional health: 52%
- Better performance at work: 24%
- Less fatigue in the evening: 21%
- Other opportunity: 9%

HA-owner, n=702

n=430
94% received 3rd party payment – share of fully reimbursed has increased since 2018!

**Owners:** Was any part or all of your hearing aid(s) paid for by a third party? (Insurance, Government, ...)

- Yes, completely: 60%
- Yes, partly: 34%
- No: 4%
- don't know: 2%

2018: 25%

**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: 48%
- No: 17%
- don't know: 35%

2018: 42%

HA-owner, n=702

HA-non-owners, n=611
Specialized hearing aid store is by far the preferred place for obtaining hearing aids (both for owners and non owners).

<table>
<thead>
<tr>
<th>OWNERS: Where was your most current hearing aid obtained?</th>
<th>NON OWNERS: If you were to get hearing aids, where would you go?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialized hearing aid store 86%</td>
<td>Specialized hearing aid store 89%</td>
</tr>
<tr>
<td>Optician 8%</td>
<td>Optician 4%</td>
</tr>
<tr>
<td>Pharmacy 2%</td>
<td>Pharmacy 2%</td>
</tr>
<tr>
<td>Online 2%</td>
<td>Online 3%</td>
</tr>
<tr>
<td>Other 2%</td>
<td>Other 2%</td>
</tr>
</tbody>
</table>

HA-owner, n=702

HA-non-owner, n=611
Recommending intention of the place where the hearing aid(s) have been obtained is high, with a positive NPS score of 31.

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 = 31

HA-owner, n=702
On average, HAs are worn 8.9 hours a day

How many hours a day are HA worn?

In the drawer (0 hours):
- 2022: 5%
- 2018: 6%

HA worn:
- 2022 Mean: 8.9 hours/day
- 2018 Mean: 9.0 hours/day

HA-owner, n=702
41% of today’s hearing aid owners are aware of their hearing aid brand.

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

- 41% Yes, I know it by heart
- 38% No, but I could find out
- 21% No, and can't find out

HA-owner, n=702
25% of the HA owners use a hearing aid app, 76% of those are satisfied with it.

Have you been informed by your hearing care professional about hearing aid apps? (HA owners, n=702)

- Yes: 39%
- No: 48%
- don't know / no answer: 13%

Do you personally use apps for your hearing aids? (HA owners, n=702)

- Yes: 25%
- No: 75%

IF APPS USED (n=177):
Overall, how satisfied with the performance of your accessory(s)?

- very dissatisfied: 2%
- dissatisfied: 5%
- somewhat dissatisfied: 8%
- neutral: 9%
- somewhat satisfied: 21%
- satisfied: 31%
- very satisfied: 24%
20% of the hearing aid owners use some kind of accessory for better speech understanding.

Do you use accessories for your hearing aids for better speech understanding?

- Yes: 20%
- No: 80%

What accessories for better speech understanding do you use with your hearing aids?

- Connection module to TV: 38%
- Smartphone/app as remote control: 30%
- Remote control: 26%
- External microphone: 25%
- Smartphone app as sound optimization tool: 25%
- Smartphone as external microphone: 22%
- Landline phone: 21%
- Other: 4%
- Don't know: 10%

HA-owner, n=702

HA-owner (use accessories for SU), n=138
13% of the HAs are (to the knowledge of the owners) equipped with Telecoil. Main usage of Telecoil with phone.

Are your hearing aids equipped with Telecoil?

- Yes: 13%
- No: 39%
- don't know: 48%

HA-owner, n=702

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

- never: 8%
- rarely: 32%
- occasionally: 32%
- often: 23%
- very often: 4%

HA-owner (equipped with Telecoil), n=87

Where do you use your telecoil to improve your hearing?

- Phone: 55%
- Theater / auditorium: 19%
- Airport: 19%
- Train station: 19%
- Church: 19%
- School / university: 18%
- Office buildings: 15%
- Conference room: 13%
- Drive thru / ticket window / bank: 10%
- Other: 9%

HA-owner (use Telecoil), n=79

How satisfied are you with the telecoil option?

- very dissatisfied: 4%
- dissatisfied: 9%
- somewhat dissatisfied: 13%
- neutral: 28%
- somewhat satisfied: 25%
- satisfied: 18%

HA-owner (use Telecoil), n=79
5% of the HA owners have already used remote fitting – but 45% of those who haven’t would consider using it!

Have you ever heard of online remote fitting and/or remote maintenance of hearing aids by a hearing care professional?
(A compatible hearing aid can be checked and adjusted as desired at any time using a secure online connection via PC, laptop, tablet or smartphone app, independently of a visit to the hearing care professional’s store).

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

Would you use such online remote fitting and/or remote maintenance of hearing aids by a hearing care professional?

Yes, would consider using
No
don't know

HA-owners currently not using remote fitting, n=675

Satisfaction with remote fitting of hearing aids:

Very dissatisfied
Dissatisfied
Somewhat Dissatisfied
Neutral
Somewhat Satisfied
Satisfied
Very Satisfied

have used remote fitting, n=27 (low sample)
Satisfaction with hearing aids and drivers
83% of the hearing aid owners say their hearing aid works better than or as expected

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

- 35% hearing aids work better than I expected
- 48% hearing aids work as I expected
- 17% hearing aids work worse than I expected

n=702
Overall satisfaction with HA: 77% of hearing aid owners are satisfied with their hearing aid(s)

<table>
<thead>
<tr>
<th>% Satisfied</th>
<th>2022</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total HA-Owner</td>
<td>3% 3% 7% 10% 24% 32% 22%</td>
<td>77% 76%</td>
</tr>
<tr>
<td>HA up to 2 years old</td>
<td>2% 6% 6% 24% 28% 33%</td>
<td>85% 86%</td>
</tr>
<tr>
<td>HA older than 2 years</td>
<td>4% 4% 8% 10% 24% 35% 15%</td>
<td>74% 67%</td>
</tr>
<tr>
<td>HA worn up to 4 hrs/day</td>
<td>12% 6% 13% 21% 18% 25% 4%</td>
<td>47% 55%</td>
</tr>
<tr>
<td>HA worn 4-8 hrs/day</td>
<td>6% 6% 8% 35% 31% 17%</td>
<td>82% 74%</td>
</tr>
<tr>
<td>HA worn more than 8 hrs/day</td>
<td>5% 7% 20% 35% 31%</td>
<td>85% 84%</td>
</tr>
</tbody>
</table>
Satisfaction with current hearing aids

**Audiologist**
- Quality of service during hearing aid fitting period
  - Professionalism of audiologist: 9% dissatisfied, 91% satisfied
  - Quality of audiologists counseling: 8% dissatisfied, 92% satisfied
  - Quality of service after purchase: 6% dissatisfied, 94% satisfied

**Sound quality**
- Clearness of tone and sound: 13% dissatisfied, 75% satisfied
- Natural sounding: 15% dissatisfied, 73% satisfied
- Richness or fidelity of sound: 15% dissatisfied, 72% satisfied
- Comfort with loud sounds: 15% dissatisfied, 71% satisfied

**Product features**
- Ease of changing battery: 6% dissatisfied, 86% satisfied
- Reliability: 9% dissatisfied, 81% satisfied
- Visibility to others: 10% dissatisfied, 79% satisfied
- Overall fit/Comfort: 15% dissatisfied, 76% satisfied
- Managing whistling/feedback/buzzing: 12% dissatisfied, 75% satisfied
- Value (performance versus money spent): 12% dissatisfied, 71% satisfied
- Battery life: 22% dissatisfied, 46% satisfied

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

*% of satisfied HA owners compared to 2018

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## Satisfaction with current hearing aids

### Listening situations

<table>
<thead>
<tr>
<th>Situation</th>
<th>Dissatisfied (%)</th>
<th>Satisfied (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversation with one Person</td>
<td>9%</td>
<td>85%</td>
</tr>
<tr>
<td>At home with family members</td>
<td>9%</td>
<td>81%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>8%</td>
<td>80%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>9%</td>
<td>79%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>10%</td>
<td>79%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>9%</td>
<td>79%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>11%</td>
<td>77%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>10%</td>
<td>75%</td>
</tr>
<tr>
<td>Listening to Music</td>
<td>13%</td>
<td>74%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>17%</td>
<td>74%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>17%</td>
<td>72%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>12%</td>
<td>72%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>11%</td>
<td>71%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>19%</td>
<td>70%</td>
</tr>
<tr>
<td>In a larger lecture hall (e.g., theater, concert hall,...)</td>
<td>18%</td>
<td>67%</td>
</tr>
<tr>
<td>Use in noisy situations</td>
<td>21%</td>
<td>67%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>13%</td>
<td>64%</td>
</tr>
</tbody>
</table>

### Trend

- *% of satisfied HA owners compared to 2018

### %dissatisfied = % very dissatisfied + % dissatisfied + % somewhat dissatisfied

### %satisfied = % somewhat satisfied + % satisfied + % very satisfied

- HA-owner, n=702
Factors influencing satisfaction with current HA: Sound quality/signal processing and overall fit are most important for overall satisfaction with HA

<table>
<thead>
<tr>
<th>Audiologist</th>
<th>Influence on overall satisfaction with HA*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of service after purchase</td>
<td>0.61</td>
</tr>
<tr>
<td>Quality of Audiologists counseling</td>
<td>0.57</td>
</tr>
<tr>
<td>Professionalism of Audiologist</td>
<td>0.54</td>
</tr>
<tr>
<td>Quality of service during hearing aid fitting period</td>
<td>0.49</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sound quality signal process.</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Richness or fidelity of sound</td>
<td>0.69</td>
</tr>
<tr>
<td>Clearness of tone and sound</td>
<td>0.67</td>
</tr>
<tr>
<td>Natural sounding</td>
<td>0.67</td>
</tr>
<tr>
<td>Comfort with loud sounds</td>
<td>0.65</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product features</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall fit/ Comfort</td>
<td>0.68</td>
</tr>
<tr>
<td>Reliability</td>
<td>0.65</td>
</tr>
<tr>
<td>Managing whistling/feedback/buzzing</td>
<td>0.62</td>
</tr>
<tr>
<td>Visibility to others</td>
<td>0.59</td>
</tr>
<tr>
<td>Value (performance versus money spent)</td>
<td>0.57</td>
</tr>
<tr>
<td>Ease of changing battery</td>
<td>0.52</td>
</tr>
<tr>
<td>Battery life</td>
<td>0.50</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: Richness or fidelity of sound 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: 49%
- When watching TV with others: 47%
- When talking on a phone: 45%
- In conversations with 1 person: 42%
- In conversations with large groups: 36%
- In conversations with small groups: 34%
- In noisy situations: 33%
- When riding in a car: 22%
- In a larger lecture hall (e.g., theater, concert hall, place...): 22%
- In a store, when shopping: 21%
- In the workplace: 19%
- When listening to music: 17%
- When talking to children: 12%
- Outdoors: 11%
- During leisure activities (e.g., exercising, taking a walk,...): 9%
- At a movie theater: 6%
- In school or a classroom (as an observer or student): 4%

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Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially Communication effectiveness, sense of safety, 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</td>
<td>6%</td>
<td>28%</td>
<td>40%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Sense of safety</td>
<td>5%</td>
<td>34%</td>
<td>33%</td>
<td>26%</td>
<td></td>
</tr>
<tr>
<td>Ability to participate in group activities</td>
<td>5%</td>
<td>35%</td>
<td>37%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Social life</td>
<td>5%</td>
<td>41%</td>
<td>32%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Feelings about yourself</td>
<td>5%</td>
<td>42%</td>
<td>30%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Sense of independence</td>
<td>5%</td>
<td>43%</td>
<td>29%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Confidence in yourself</td>
<td>4%</td>
<td>44%</td>
<td>27%</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Mental/emotional health</td>
<td>3%</td>
<td>47%</td>
<td>29%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Relationships at home</td>
<td>4%</td>
<td>51%</td>
<td>24%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Relationships at work</td>
<td>3%</td>
<td>53%</td>
<td>25%</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Mental ability</td>
<td>4%</td>
<td>54%</td>
<td>26%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Physical health</td>
<td>4%</td>
<td>57%</td>
<td>23%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Success on the job</td>
<td>4%</td>
<td>57%</td>
<td>20%</td>
<td>17%</td>
<td></td>
</tr>
</tbody>
</table>

HA-owner, n=702
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in almost all aspects

% of HA owners feeling better/a lot better

- Low 50% hearing loss (n=250)
- Top 50% hearing loss (n=390)
71% 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: 71%
- No: 29%

n=702
... a majority of the hearing aid owners also feel more confident when driving a car / riding a bicycle on their own, since wearing hearing aids.
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?

<table>
<thead>
<tr>
<th>Aspect</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>Communication with Person</td>
<td>3%</td>
<td>11%</td>
<td>33%</td>
<td>31%</td>
<td>22%</td>
</tr>
<tr>
<td>Social activities together with Person</td>
<td>3%</td>
<td>11%</td>
<td>48%</td>
<td>24%</td>
<td>15%</td>
</tr>
<tr>
<td>Personal relationship with Person</td>
<td>3%</td>
<td>6%</td>
<td>61%</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>Quarrels/disputes with Person</td>
<td>4%</td>
<td>6%</td>
<td>65%</td>
<td>15%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Someone in HH / parent has HA, n=517
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?

- Never: 4%
- Rarely: 14%
- Occasionally: 36%
- Regularly: 47%

n=702
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=702</th>
<th>HA-Non-owner Low 50% HL n=326</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>Unilateral loss</td>
<td>16%</td>
<td>36%</td>
<td>33%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>84%</td>
<td>64%</td>
<td>67%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>12%</td>
<td>56%</td>
<td>13%</td>
</tr>
<tr>
<td>Moderate</td>
<td>57%</td>
<td>39%</td>
<td>69%</td>
</tr>
<tr>
<td>Severe</td>
<td>23%</td>
<td>3%</td>
<td>16%</td>
</tr>
<tr>
<td>Profound</td>
<td>8%</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

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

- **Uncomfortable**: 46% Reason, 22% Somewhat a reason, 33% Not a reason
- **Hear well enough in most situations**: 30% Reason, 30% Somewhat a reason, 40% Not a reason
- **Hearing loss not severe enough**: 28% Reason, 30% Somewhat a reason, 42% Not a reason
- **They do not restore your hearing to normal**: 37% Reason, 19% Somewhat a reason, 44% Not a reason
- **They do not work well in noisy situations**: 31% Reason, 22% Somewhat a reason, 47% Not a reason
- **Ear doctors opinion (ENT)**: 43% Reason, 10% Somewhat a reason, 48% Not a reason
- **Audiologists opinion**: 34% Reason, 10% Somewhat a reason, 56% Not a reason
- **Family doctors opinion (GP)**: 31% Reason, 14% Somewhat a reason, 56% Not a reason
- **Have more serious priorities**: 28% Reason, 16% Somewhat a reason, 56% Not a reason
- **Cannot afford a hearing aid**: 30% Reason, 13% Somewhat a reason, 56% Not a reason

Base: non owners Top 50% HL: n=198
### Less important reasons for not having a hearing aid (II/II)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>33%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>27%</td>
</tr>
<tr>
<td>Have hearing loss in only one ear</td>
<td>28%</td>
</tr>
<tr>
<td>Bad design</td>
<td>25%</td>
</tr>
<tr>
<td>Do not admit I have a hearing loss in public</td>
<td>22%</td>
</tr>
<tr>
<td>I have vision or dexterity problems</td>
<td>26%</td>
</tr>
<tr>
<td>Social / Family opinion such as child, spouse, friend</td>
<td>20%</td>
</tr>
<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>28%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>21%</td>
</tr>
<tr>
<td>Have not had hearing tested yet</td>
<td>29%</td>
</tr>
<tr>
<td>Another hearing aid owners opinion</td>
<td>25%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>20%</td>
</tr>
<tr>
<td>Would be embarrassed to wear a hearing aid</td>
<td>21%</td>
</tr>
<tr>
<td>Hearing problem requires surgery</td>
<td>21%</td>
</tr>
<tr>
<td>Had surgery - hearing aids wont help</td>
<td>16%</td>
</tr>
<tr>
<td>Do not trust Audiologist</td>
<td>10%</td>
</tr>
<tr>
<td>Do not know where to get hearing aids</td>
<td>10%</td>
</tr>
</tbody>
</table>

**Reason**

- Base: non owners Top 50% HL: n=198
Top 10 reasons for HA owners NOT using them

<table>
<thead>
<tr>
<th>Reason</th>
<th>Somewhat a reason</th>
<th>Not a reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>They do not work well in noisy situations</td>
<td>59%</td>
<td>26%</td>
</tr>
<tr>
<td>Uncomfortable</td>
<td>67%</td>
<td>18%</td>
</tr>
<tr>
<td>Hearing loss not severe enough</td>
<td>66%</td>
<td>13%</td>
</tr>
<tr>
<td>They do not restore your hearing to normal</td>
<td>59%</td>
<td>17%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>56%</td>
<td>15%</td>
</tr>
<tr>
<td>Hear well enough in most situations</td>
<td>55%</td>
<td>13%</td>
</tr>
<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>51%</td>
<td>15%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>36%</td>
<td>26%</td>
</tr>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>52%</td>
<td>7%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>29%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Owners who don't use, n=35 (low sample!)
Social rejection because of hearing loss compared to the acceptance of hearing aids
74% 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 aids.

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

- 74%
- 14%
- 9%
- 4%

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

- 38%
- 36%
- 25%
- 1%

n=702

Base: Top 50% hearing loss, no hearing aid n=198
Most important triggers to buy
The most important influencing factors for getting hearing aids are worsening hearing loss, ENT, 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?

- Hearing loss got worse: 49% (HA owners) vs 60% (non owners)
- ENT/Ear Doctor: 60% (HA owners) vs 59% (non owners)
- Audiologist: 51% (HA owners) vs 41% (non owners)
- Spouse: 41% (HA owners) vs 36% (non owners)
- GP/Family doctor: 34% (HA owners) vs 36% (non owners)

Other factors include:
- Free due to coverage by Insurance /Received hearing aid free: 24% (HA owners) vs 28% (non owners)
- Price of hearing aid: 19% (HA owners) vs 29% (non owners)
- Relative, friend: 14% (HA owners) vs 15% (non owners)
- Financial Situation improved: 13% (HA owners) vs 15% (non owners)
- Child: 15% (HA owners) vs 13% (non owners)
- Another hearing aid owner (word of mouth): 11% (HA owners) vs 13% (non owners)
- Safety concerns: 8% (HA owners) vs 8% (non owners)
- TV advertisement: 6% (HA owners) vs 6% (non owners)
- Direct mail piece: 4% (HA owners) vs 5% (non owners)
- Internet: Websites of hearing aids manufacturers: 3% (HA owners) vs 3% (non owners)
- Co-worker or boss: 3% (HA owners) vs 3% (non owners)
- Internet: Websites of hearing aid clinics: 6% (HA owners) vs 6% (non owners)
- Newspaper advertisement: 2% (HA owners) vs 2% (non owners)
- Information/advice about hearing loss from consumer...: 2% (HA owners) vs 3% (non owners)
- Hearing loss article or literature: 2% (HA owners) vs 3% (non owners)
- Internet: Other websites, google...: 2% (HA owners) vs 2% (non owners)
- Radio advertisement: 2% (HA owners) vs 2% (non owners)
- Magazine advertisement: 2% (HA owners) vs 2% (non owners)
- Celebrity or public Personality: 2% (HA owners) vs 2% (non owners)
- Telemarketing phone call: 2% (HA owners) vs 2% (non owners)

- Hearing aid (n=702)
- Hearing loss but no hearing aid (n=611)

- **Top 5 influences for HA owners in EuroTrak 2018**
- **Top 5 influences for non owners in EuroTrak 2018**
The most important triggers to get hearing aids are worsening hearing loss, followed by the ENT and audiologist/spouse.

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

- Hearing loss got worse: 30%
- ENT/ Ear Doctor: 26%
- Hearing aid dispenser / Audiologist: 11%
- Spouse: 11%
- GP /Family doctor: 4%
- Friend / relative: 3%
- Child: 3%
- 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></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><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>6'700</td>
<td>12.1%</td>
<td>37.3%</td>
<td>48.9%</td>
<td>57.4%</td>
<td>48.8%</td>
</tr>
<tr>
<td>Female</td>
<td>6'856</td>
<td>10.1%</td>
<td>45.6%</td>
<td>51.1%</td>
<td>42.6%</td>
<td>51.2%</td>
</tr>
<tr>
<td><strong>Age recoded</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 - 14</td>
<td>1'856</td>
<td>1.9%</td>
<td>39.5%</td>
<td>15.1%</td>
<td>2.4%</td>
<td>2.3%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1'324</td>
<td>2.5%</td>
<td>47.8%</td>
<td>10.7%</td>
<td>1.9%</td>
<td>2.5%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>1'628</td>
<td>4.8%</td>
<td>33.6%</td>
<td>12.9%</td>
<td>5.9%</td>
<td>4.2%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1'703</td>
<td>6.2%</td>
<td>37.4%</td>
<td>13.3%</td>
<td>7.5%</td>
<td>6.4%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>1'796</td>
<td>6.8%</td>
<td>32.4%</td>
<td>13.9%</td>
<td>9.3%</td>
<td>6.4%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>2'140</td>
<td>12.5%</td>
<td>36.6%</td>
<td>15.5%</td>
<td>19.1%</td>
<td>15.8%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1'567</td>
<td>20.2%</td>
<td>41.5%</td>
<td>10.4%</td>
<td>20.8%</td>
<td>21.2%</td>
</tr>
<tr>
<td>74+</td>
<td>1'541</td>
<td>35.5%</td>
<td>46.6%</td>
<td>8.2%</td>
<td>33.0%</td>
<td>41.2%</td>
</tr>
<tr>
<td><strong>Type of household</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>single household</td>
<td>2'044</td>
<td>17.0%</td>
<td>46.0%</td>
<td>14.1%</td>
<td>21.1%</td>
<td>25.7%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>3'964</td>
<td>15.7%</td>
<td>43.2%</td>
<td>27.7%</td>
<td>39.9%</td>
<td>43.3%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>5'271</td>
<td>5.4%</td>
<td>35.9%</td>
<td>41.4%</td>
<td>20.6%</td>
<td>16.5%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>824</td>
<td>5.4%</td>
<td>30.4%</td>
<td>6.5%</td>
<td>3.5%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>218</td>
<td>33.7%</td>
<td>52.0%</td>
<td>1.2%</td>
<td>4.0%</td>
<td>6.2%</td>
</tr>
<tr>
<td>Other</td>
<td>1'236</td>
<td>10.9%</td>
<td>28.0%</td>
<td>9.1%</td>
<td>10.9%</td>
<td>6.1%</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>6'752</td>
<td>14.4%</td>
<td>41.4%</td>
<td>48.0%</td>
<td>64.2%</td>
<td>64.9%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>3'067</td>
<td>10.4%</td>
<td>44.2%</td>
<td>22.8%</td>
<td>20.1%</td>
<td>22.7%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>2'565</td>
<td>2.1%</td>
<td>29.5%</td>
<td>20.8%</td>
<td>4.2%</td>
<td>2.5%</td>
</tr>
<tr>
<td>Other person</td>
<td>1'172</td>
<td>13.9%</td>
<td>37.4%</td>
<td>8.4%</td>
<td>11.5%</td>
<td>9.8%</td>
</tr>
<tr>
<td>Employment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full time employed</td>
<td>4'790</td>
<td>7.8%</td>
<td>30.3%</td>
<td>43.6%</td>
<td>30.1%</td>
<td>18.7%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>1'467</td>
<td>8.2%</td>
<td>43.8%</td>
<td>13.3%</td>
<td>7.8%</td>
<td>8.7%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>862</td>
<td>5.5%</td>
<td>32.6%</td>
<td>8.0%</td>
<td>3.7%</td>
<td>2.6%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
<td>271</td>
<td>9.7%</td>
<td>40.8%</td>
<td>2.4%</td>
<td>1.8%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>1'405</td>
<td>22.6%</td>
<td>44.9%</td>
<td>10.7%</td>
<td>20.2%</td>
<td>23.6%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>1'996</td>
<td>28.3%</td>
<td>47.1%</td>
<td>14.1%</td>
<td>34.5%</td>
<td>44.0%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>807</td>
<td>2.6%</td>
<td>21.1%</td>
<td>7.8%</td>
<td>1.9%</td>
<td>0.7%</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hauptschule</td>
<td>1'448</td>
<td>17.4%</td>
<td>39.4%</td>
<td>11.8%</td>
<td>17.7%</td>
<td>16.4%</td>
</tr>
<tr>
<td>Mittlere Reife (Realschule)</td>
<td>2'267</td>
<td>9.4%</td>
<td>43.2%</td>
<td>20.3%</td>
<td>14.0%</td>
<td>15.2%</td>
</tr>
<tr>
<td>Abitur/Fachabitur</td>
<td>1'569</td>
<td>8.0%</td>
<td>38.8%</td>
<td>14.3%</td>
<td>8.9%</td>
<td>8.1%</td>
</tr>
<tr>
<td>Lehrabschluss/Anlehre</td>
<td>2'754</td>
<td>14.7%</td>
<td>41.9%</td>
<td>23.2%</td>
<td>27.2%</td>
<td>28.0%</td>
</tr>
<tr>
<td>Höhere Berufsausbildung (Techniker, Meister o.Ä.)</td>
<td>924</td>
<td>16.5%</td>
<td>39.8%</td>
<td>7.6%</td>
<td>10.6%</td>
<td>10.0%</td>
</tr>
<tr>
<td>Fachhochschulabschluss</td>
<td>766</td>
<td>13.0%</td>
<td>41.6%</td>
<td>6.6%</td>
<td>6.7%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Universitätsabschluss</td>
<td>1'378</td>
<td>12.0%</td>
<td>45.5%</td>
<td>12.0%</td>
<td>10.4%</td>
<td>12.4%</td>
</tr>
<tr>
<td>Anderes</td>
<td>490</td>
<td>11.6%</td>
<td>31.3%</td>
<td>4.3%</td>
<td>4.5%</td>
<td>2.9%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%*

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

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

<table>
<thead>
<tr>
<th>Sample size</th>
<th>Random sample error</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Real value is within interval:</td>
</tr>
<tr>
<td></td>
<td>Level of proportion: 50%/50%</td>
</tr>
<tr>
<td>50</td>
<td>$\pm 13.9$</td>
</tr>
<tr>
<td>100</td>
<td>$\pm 9.8$</td>
</tr>
<tr>
<td>250</td>
<td>$\pm 6.2$</td>
</tr>
<tr>
<td>500</td>
<td>$\pm 4.4$</td>
</tr>
<tr>
<td>1'000</td>
<td>$\pm 3.1$</td>
</tr>
<tr>
<td>5’000</td>
<td>$\pm 1.4$</td>
</tr>
<tr>
<td>10’000</td>
<td>$\pm 1.0$</td>
</tr>
</tbody>
</table>