Results

EuroTrak ITA 2022

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

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

Sample sizes:
Representative sample (sample 1): n=15’210 people
Hearing impaired (sample 2):
   HA owners: n= 494 people
   Hearing impaired non-owners: n= 823 people

EuroTrak ITA 2022 is part of the EuroTrak / APACTrak studies:
Summary
2. Market overview

- **Stated hearing loss prevalence**
  - Total: 12.5%, 18+: 14.4% (2018: 12.1 18+: 14.0%).
  - Hearing Tests: 30% (2018: 38%) had a hearing test in the last 5 years, most tests done by ENTs.

- **Hearing aid adoption rate (HA penetration)**
  - 35.2% of those with self declared HL (2018: 29.5%).
  - 4.4% of total population (2018: 3.6%).
  - 55% of HA owners have binaural treatment (2018: 61%).

- **The route to the hearing aid**
  - 78% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 53% got hearing aids recommended from the ENT or family doctor (drop out rate=32% / 2018: 27%).
  - 85% of the GP consultations referred to an ENT, 20% to an Audiologist, 10% to get hearing aids. 4% recommended no action.
  - 35% of ENT consultations referred to an Audiologist, 37% recommended to get a hearing aid, 36% 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
  - 64% of all HA owners received some kind of 3rd party reimbursement.
  - 71% of the currently owned HAs were bought in 2019 or later.
  - The average age of the currently owned HAs is 3.2 years.
  - The median age of hearing aids before replacement is 5 years.
  - On average, HAs are worn 8 hours a day.
  - RIC is the most often purchased type of HA.
  - Cochlear Implants: 28% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
  - 26% of the HA owners use a hearing aids app, 74% of those are satisfied with it.
  - 13% of the HAs are (to the knowledge of the owners) equipped with Telecoil. Main usage of Telecoil with phone, church, theaters.

- Importance of listening situations and satisfaction with HAs
  - 87% of the hearing aid owners say their hearing aid works better than or as expected.
  - 79% of the HA owners are satisfied with their HAs (2018: 81%).
  - 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 and on the phone, when watching TV and conversations/noisy situations are the most important listening situations.

- Positive impact of HAs
  - Significant positive impact of HAs on different aspects: Especially social life, relationships at home, communication effectiveness and ability to participate in group activities improve with hearing aids.
  - 97% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
  - 83% of the hearing aid owners feel more confident moving in a city since wearing hearing aids.
Summary
4. Analysis of hearing impaired non-owners

- Reasons not to own/use HAs
  - Only 24% of the hearing impaired without hearing aids think that a third party would pay for any part of hearing aids.
  - The main reasons for not using hearing aids are that the hearing loss is not severe enough, they are uncomfortable, and people think to hear enough.
  - 4% who own hearing aids don’t use them at all (0 hours); 11% use them less than one hour/day (0-1 hour).

- Social rejection and triggers to buy
  - 48% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely that somebody makes fun of or rejects a hearing impaired without a hearing aid. (only 21% 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, GPs, and spouse/child (+price / insurance coverage for the non-owners).
Detailed Results: Roadmap

1. **Introduction**
   - Organisation of EuroTrak ITA 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 ITA 2022

Organisation

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

Use of the data

- ANIFA 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 ITA/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 panellist pools
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of \( n=15'210 \) 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: \( n=494 \) hearing aid owners and \( n=823 \) hearing impaired non-owners
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age

n=15'210
# Hearing loss prevalence ITA

## Self declared hearing loss

<table>
<thead>
<tr>
<th>Age Group</th>
<th>EuroTrak 2022</th>
<th>EuroTrak 2018</th>
<th>EuroTrak 2015</th>
<th>EuroTrak 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;=14</td>
<td>2.2%</td>
<td>2.2%</td>
<td>2.0%</td>
<td>2.0%</td>
</tr>
<tr>
<td>15-24</td>
<td>2.6%</td>
<td>2.4%</td>
<td>2.6%</td>
<td>2.6%</td>
</tr>
<tr>
<td>25-34</td>
<td>3.0%</td>
<td>3.2%</td>
<td>3.7%</td>
<td>3.7%</td>
</tr>
<tr>
<td>35-44</td>
<td>4.2%</td>
<td>4.9%</td>
<td>5.4%</td>
<td>5.4%</td>
</tr>
<tr>
<td>45-54</td>
<td>6.6%</td>
<td>7.7%</td>
<td>7.7%</td>
<td>7.7%</td>
</tr>
<tr>
<td>55-64</td>
<td>8.8%</td>
<td>9.0%</td>
<td>10.2%</td>
<td>10.2%</td>
</tr>
<tr>
<td>65-74</td>
<td>11.4%</td>
<td>14.6%</td>
<td>14.8%</td>
<td>14.8%</td>
</tr>
<tr>
<td>74+</td>
<td>22.4%</td>
<td>27.5%</td>
<td>29.2%</td>
<td>37.5%</td>
</tr>
<tr>
<td>Total</td>
<td>12.5%</td>
<td>17.1%</td>
<td>23.1%</td>
<td>38.3%</td>
</tr>
</tbody>
</table>

% hearing loss prevalence

- **EuroTrak 2022**: Base: 15'210
- **EuroTrak 2018**: Base: 15'015
- **EuroTrak 2015**: Base: 15'641
- **EuroTrak 2012**: Base: 15'536

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Hearing aid adoption rate: 35% of hearing impaired have hearing aid(s), 55% 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>Ears impaired (stated)</th>
<th>HA-Non-owner n=823</th>
<th>HA Owner n=494</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unilateral loss</td>
<td>43%</td>
<td>29%</td>
<td>28%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>57%</td>
<td>71%</td>
<td>43%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Perceived loss</th>
<th>HA-Non-owner n=823</th>
<th>HA Owner n=494</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mild</td>
<td>37%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Moderate</td>
<td>50%</td>
<td>45%</td>
<td>33%</td>
</tr>
<tr>
<td>Severe</td>
<td>11%</td>
<td>42%</td>
<td>66%*</td>
</tr>
<tr>
<td>Profound</td>
<td>2%</td>
<td>6%</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: 38%), most tests done by ENTs

Have you ever taken a hearing test?
- Yes, in the last 12 months: 56%
- Yes, in the last 1-5 years: 17%
- Yes, more than 5 years ago: 15%
- No, never: 13%

Where/how was your hearing tested?
- Ear doctor (ENT): 73%
- Family doctor: 17%
- Audiologist: 15%
- Other: 15%
- Online test, smartphone app: 5%
- DNK: 5%
The route to the hearing aid:
Sources of information and drop-out rates
Doctors are the most important sources of information and therefore the major gatekeepers – followed by internet research, other people with hearing aids and hearing aid stores.
53% of all hearing impaired have seen hearing aids advertisement recently (2018: 58%)

Have you recently seen any advertisement regarding hearing aids?
('Recentemente ha visto pubblicità riguardanti il tema degli apparecchi acustici?')

The advertisement you have seen was:*
('La pubblicità che ha visto/sentito era:')

- Product/brand advertising
- Hearing aid center advertising
- Internet advertising - social media
- Other

Percentage of „Yes“ by region:
- Region North: 55%
- Region Central: 49%
- Region South: 53%

Hearing impaired, n=1'317

*multiple responses possible (sum doesn’t add up to 100%)
Of those who discussed the hearing loss with a doctor, 57% talked to a family doctor (GP) first and 43% 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)?

- **57%** discussed with their family doctor.
- **43%** discussed with an ENT specialist.

**Total n= 981**

- **Hearing aid n=438**
  - 60% discussed with a family doctor.
  - 40% discussed with an ENT specialist.

- **Hearing loss but no hearing aid n=543**
  - 55% discussed with a family doctor.
  - 45% discussed with an ENT specialist.
The route to the hearing aid

2018: 20%
Drop out: 22%

2018: 27%
Drop out: 32%

2018: 48%

2022 the term “un negozio di apparecchi acustici” was used

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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=1'317
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>Total hearing impaired</th>
<th>HA owner</th>
<th>Hearing impaired non-owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022 n=1’317</td>
<td>2018 n= 1’332</td>
<td></td>
</tr>
<tr>
<td>64%</td>
<td>84%</td>
<td>54%</td>
</tr>
<tr>
<td>67%</td>
<td>83%</td>
<td>61%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

**HA owner (n=401)**
- Referred to an ear doctor (ENT): 84%
- Referred to an Audiologist: 29%
- Recommended to get a hearing aid: 17%
- Recommended no further action: 0%

**Impaired non-owner (n=419)**
- Referred to an ear doctor (ENT): 86%
- Referred to an Audiologist: 13%
- Recommended to get a hearing aid: 4%
- Recommended no further action: 7%
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>Total hearing impaired</th>
<th>HA owner (n=430)</th>
<th>Impaired non-owner (n=484)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total hearing impaired</td>
<td>Referred to an Audiologist</td>
<td>44%</td>
</tr>
<tr>
<td>HA owner</td>
<td>Did prescribe a hearing aid</td>
<td>63%</td>
</tr>
<tr>
<td>Hearing impaired non-owners</td>
<td>Recommended no further action</td>
<td>5%</td>
</tr>
<tr>
<td>2022 n=1'317</td>
<td>2018 n= 1'332</td>
<td>2022 n=1'317</td>
</tr>
<tr>
<td>Referred to an Audiologist</td>
<td>60%</td>
<td>15%</td>
</tr>
<tr>
<td>Did prescribe a hearing aid</td>
<td>63%</td>
<td>61%</td>
</tr>
<tr>
<td>Recommended no further action</td>
<td>5%</td>
<td>27%</td>
</tr>
</tbody>
</table>

What did he/she recommend?
The route to the hearing aid: Audiologist
Have you ever discussed your hearing problem with a HA dispenser / Audiologist?

<table>
<thead>
<tr>
<th>% Discussed with hearing aid dispenser / Audiologist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total hearing impaired</td>
</tr>
<tr>
<td>HA owner</td>
</tr>
<tr>
<td>Hearing impaired non-owners</td>
</tr>
</tbody>
</table>

What did he/she recommend?

**HA owner (n=386)**
- Recommended to get a hearing aid: 99%
- Recommended not to get a hearing aid: 1%

**Impaired non-owner (n=137)**
- Recommended to get a hearing aid: 82%
- Recommended not to get a hearing aid: 18%
Recommendations by profession

- 85% recommended no further action in 2022.
- 20% referred to an ear doctor (ENT).
- 10% referred to an HA dispenser / Audiologist.
- 35% recommended to get a hearing aid.

Sums can add to more than 100% (multiple responses).

2022 the term “un negozio di apparecchi acustici” was used.
Only few hearing impaired go to the audiologist BEFORE seeing a doctor about the hearing loss

[IF SEEN FAMILY DOCTOR & AUDIOLOGIST]
Did you discuss your hearing loss with the family doctor BEFORE visiting the HA dispenser / Audiologist? (n=429)

- Yes: 89%
- No, I went to the audiologist first: 11%

[IF SEEN ENT & AUDIOLOGIST]
Did you discuss your hearing loss with the ear doctor (ENT) BEFORE visiting the HA dispenser / Audiologist? (n=469)

- Yes: 91%
- No, I went to the audiologist first: 9%

[IF SEEN THE AUDIOLOGIST FIRST]
Did the HA dispenser / Audiologist refer you to the family doctor? (n=42)

- Yes: 27%
- No, I decided by myself: 73%

[IF SEEN THE AUDIOLOGIST FIRST]
Did the HA dispenser / Audiologist refer you to the ear doctor (ENT)? (n=30)

- Yes: 27%
- No, I decided by myself: 73%

2022 the term “un negozio di apparecchi acustici” was used
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities
Work competitiveness: 97% 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: 3%
- Of some use: 30%
- Of significant use: 67%

n=262
Work competitiveness: People with hearing aids recognize that hearing aids increase the chance of hearing impaired to get promoted, to get the right job and to get more salary

I think that people with an untreated hearing loss tend to be less promoted in their job

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

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

Base: Hearing loss, no hearing aid n=678/ hearing aid n=439

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General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*)

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

Base: hearing aid n=286 / top 50% HL, no hearing aid =117

*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.

In the evenings I often feel physically exhausted

- Hearing aid: 16% Strongly agree, 27% Rather agree, 26% Neutral, 22% Rather disagree, 9% Disagree strongly
- Top 50% hearing loss, no hearing aid: 16% Strongly agree, 39% Rather agree, 22% Neutral, 15% Rather disagree, 7% Disagree strongly

In the evenings I often feel mentally exhausted

- Hearing aid: 15% Strongly agree, 28% Rather agree, 22% Neutral, 23% Rather disagree, 12% Disagree strongly
- Top 50% hearing loss, no hearing aid: 14% Strongly agree, 45% Rather agree, 15% Neutral, 19% Rather disagree, 8% Disagree strongly

Base: hearing aid n=279 / top 50% HL, no hearing aid =115

*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

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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:
  - No: 45%
  - Yes: 55%

- Hearing aid:
  - No: 56%
  - Yes: 44%

Base: hearing aid n=117 / top 50% HL, no hearing aid =286
26% 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: 26%
- Depression: 26%
- High blood pressure: 19%
- Poor eyesight: 12%
- Dementia: 11%
- Diabetes: 10%
- Back problems: 10%

Hearing loss is not linked to any of those health issues: 45%
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>(3%)</td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2%</td>
</tr>
<tr>
<td>Severe</td>
<td>(22%)</td>
<td>7%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>15%</td>
</tr>
<tr>
<td>Moderate</td>
<td>(48%)</td>
<td>32%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>16%</td>
</tr>
<tr>
<td>Mild</td>
<td>(27%)</td>
<td>24%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3%</td>
</tr>
</tbody>
</table>

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

n=1'317

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71% of the currently owned HAs were acquired in 2019 or later. RIC is the most often purchased type of HA.

**Type of HA**

- Behind the ear hearing aid with speaker in the ear connected by a thin wire: 41%
- Behind the ear hearing aid with a tube and earpiece: 27%
- In the ear hearing aid: 23%
- Cochlear Implant: 0%
- Other: 2%

**Age of currently owned HAs (Mean):**
- 2022: 3.2 years
- 2018: 2.9 years
49% of the population in ITA have never heard of Cochlear Implants. 28% 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?

- 49% Yes, know it well
- 40% Yes, know it a little
- 11% No, never heard of it

n=4'056

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

- 28% Yes
- 57% No
- 15% don't know

n=181 (HA owners with severe/profound HL)
Hearing aids are used for 5 years before they are replaced. On average 2-3 years pass between becoming aware of the hearing loss and the purchase of hearing aids.

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?

<table>
<thead>
<tr>
<th>Years</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 year</td>
<td>34%</td>
</tr>
<tr>
<td>2 years</td>
<td>23%</td>
</tr>
<tr>
<td>3 years</td>
<td>24%</td>
</tr>
<tr>
<td>4-6 years</td>
<td>11%</td>
</tr>
<tr>
<td>More than 6 years</td>
<td>7%</td>
</tr>
</tbody>
</table>

n=367

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

<table>
<thead>
<tr>
<th>Years</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 year</td>
<td>18%</td>
</tr>
<tr>
<td>2 years</td>
<td>18%</td>
</tr>
<tr>
<td>3 years</td>
<td>22%</td>
</tr>
<tr>
<td>4-6 years</td>
<td>19%</td>
</tr>
<tr>
<td>More than 6 years</td>
<td>22%</td>
</tr>
</tbody>
</table>

n=727

Age of HA before it has been replaced:
2022: 5 years (median)
2018: 4 years (median)
Thinking back before you obtained your first hearing aid(s): do you think, you should have gotten them sooner?

- Yes: 67% 
- No: 33%

67% 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: 53%
- Better performance at work: 29%
- Less fatigue in the evening: 24%
- Other opportunity: 1%

HA-owner, n=494

n=349
64% of the hearing aid owners received some kind of third party reimbursement. A majority of hearing impaired without hearing aids don’t know whether a third party would pay any part of hearing aids.

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

**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, ...)

---

**HA-owner, n=494**

- 42% Yes, completely
- 22% Yes, partially
- 31% No
- 5% I don’t know

**HA-non-owners, n=823**

- 59% Yes
- 17% No
- 24% Don't know

---

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59% of those with reimbursement knew they were entitled to it. 55% of hearing aid owners had a free-of-charge trial before acquiring the hearing aid.

[IF REIMBURSEMENT RECEIVED]

**Owners**: Before acquiring your hearing aids, were you aware to be entitled for a reimbursement?

![Chart showing percentage of owners aware of reimbursement entitlement](image)

- Yes: 36%
- No: 59%
- I don’t know: 5%

2018: 65%

HA-owner with reimbursement, n=297

**Owners**: Did you have the chance of one month free of charge trial before acquiring the hearing aid?

![Chart showing percentage of owners with trial](image)

- Yes: 9%
- No: 36%
- I don’t remember: 55%

2018: 60%

HA-owner, n=494
A specialized hearing aid store is the preferred place for obtaining hearing aids (both for owners and non-owners)

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

- Specialized hearing aid store: 87%
- Pharmacy: 6%
- Online: 3%
- Optician: 2%
- At home: 1%

HA-owner, n=494

**Non-owners:** If you were to get hearing aids, where would you go?

- Specialized hearing aid store: 74%
- Pharmacy: 9%
- Online: 4%
- Optician: 4%
- At home: 6%

HA-non-owner, n=823
Recommendation intention of the place where the hearing aid(s) have been obtained: Positive NPS score of 15

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

**DETRACTORS** 22%

**PASSIVES** 42%

**PROMOTERS** 36%

NPS = PROMOTERS – DETRACTORS = 15 (exact figure rounded)

HA-owner, n=494
On average, HAs are worn 8 hours a day

How many hours a day are HA worn?

HA worn:
2022 Mean: 8.0 hours/day
2018 Mean: 7.9 hours/day

In the drawer (0 hours):
2022: 4%
2018: 6%
59% 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: 59%
- No, but I could find out: 18%
- No, and can't find out: 22%

2018: 52%

HA-owner, n=494
26% of the HA owners use a hearing aid app, 74% of those are satisfied with it.

Have you been informed by your hearing care professional about hearing aid apps? (HA owners, n=494)

- Yes: 50%
- No: 36%
- Don’t know / no answer: 15%

Do you personally use apps for your hearing aids? (HA owners, n=494)

- Yes: 26%
- No: 74%

IF APPS USED (n=165):
Overall, how satisfied with the performance of your apps?

- Very dissatisfied: 2%
- Dissatisfied: 7%
- Somewhat Dissatisfied: 13%
- Neutral: 35%
- Somewhat Satisfied: 20%
- Satisfied: 19%
13% of the HAs are (to the knowledge of the owners) equipped with Telecoil. The primary usage of Telecoil is with the phone, in a church, and a theatre / auditorium.

Are your hearing aids equipped with Telecoil?

- Yes: 13%
- No: 52%
- Don't know: 35%

HA-owner, n=494

Where do you use your telecoil to improve your hearing?

- Phone: 46%
- Church: 29%
- Theater / auditorium: 25%
- Train station: 18%
- Airport: 18%
- Conference room: 17%
- Drive thru / ticket window / bank: 17%
- Office buildings: 16%
- School / university: 12%
- Other: 1%

HA-owner (use Telecoil), n=84

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

- Never: 6%
- Rarely: 15%
- Occasionally: 28%
- Often: 33%
- Very often: 19%

HA-owner (equipped with Telecoil), n=84

How satisfied are you with the telecoil option?

- Very dissatisfied: 4%
- Dissatisfied: 12%
- Somewhat Dissatisfied: 24%
- Neutral: 40%
- Somewhat Satisfied: 20%
- Satisfied: 20%
- Very Satisfied: 20%

HA-owner (use Telecoil), n=84
12% of the HA owners have already used remote fitting, 43% have at least heard of it, and 45% 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.)

- Yes, I have used it (12%)
- Heard of it but never used it (43%)
- No, never heard of it (45%)

HA-owner, n=494
Satisfaction with hearing aids and drivers
87% of the hearing aid owners say their hearing aid works better than or as expected

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

- 31% hearing aids work better than I expected
- 56% hearing aids work as I expected
- 13% hearing aids work worse than I expected

n=494
Overall satisfaction with HA: 79% of hearing aid owners are satisfied with their hearing aid(s)
## Overall satisfaction: Additional analysis

<table>
<thead>
<tr>
<th>Category</th>
<th>Yes the first time I own/use hearing aids n=385</th>
<th>No I have/had other hearing aid(s) before the current one(s) n=109</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reimbursement Yes n=327</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>No</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Very dissatisfied</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Dissatisfied</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Somewhat Dissatisfied</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>Neutral</td>
<td>35%</td>
<td>39%</td>
</tr>
<tr>
<td>Somewhat Satisfied</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Satisfied</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Very Satisfied</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Reimbursement No n=149</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>No</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Very dissatisfied</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Dissatisfied</td>
<td>12%</td>
<td>13%</td>
</tr>
<tr>
<td>Somewhat Dissatisfied</td>
<td>35%</td>
<td>34%</td>
</tr>
<tr>
<td>Neutral</td>
<td>30%</td>
<td>39%</td>
</tr>
<tr>
<td>Somewhat Satisfied</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Satisfied</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Very Satisfied</td>
<td>11%</td>
<td></td>
</tr>
</tbody>
</table>

**Overall satisfaction: 2022**
- 82% Reimbursement Yes
- 72% Reimbursement No
- 80% Yes the first time I own/use hearing aids
- 75% No I have/had other hearing aid(s) before the current one(s)

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Satisfaction with current hearing aids

### HA dispenser/Audiologist
- Professionalism of Audiologist: 4% dissatisfied, 5% dissatisfied, 6% somewhat satisfied, 86% satisfied
- Quality of Audiologists counseling: 5% dissatisfied, 6% somewhat satisfied, 85% satisfied
- Quality of service after purchase: 6% dissatisfied, 83% satisfied
- Quality of service during hearing aid fitting period: 6% dissatisfied, 83% satisfied

### Sound quality signal process.
- Clearness of tone and sound: 7% dissatisfied, 8% somewhat satisfied, 80% satisfied
- Natural sounding: 9% dissatisfied, 9% somewhat satisfied, 79% satisfied
- Richness or fidelity of sound: 8% dissatisfied, 8% somewhat satisfied, 79% satisfied
- Comfort with loud sounds: 10% dissatisfied, 10% somewhat satisfied, 76% satisfied

### Product features
- Overall fit/Comfort: 7% dissatisfied, 7% somewhat satisfied, 84% satisfied
- Visibility to others: 6% dissatisfied, 6% somewhat satisfied, 84% satisfied
- Reliability: 9% dissatisfied, 9% somewhat satisfied, 83% satisfied
- Managing whistling/feedback/buzzing: 8% dissatisfied, 8% somewhat satisfied, 81% satisfied
- Ease of changing battery: 6% dissatisfied, 6% somewhat satisfied, 80% satisfied
- Battery life: 11% dissatisfied, 11% somewhat satisfied, 80% satisfied
- Value (performance versus money spent): 12% dissatisfied, 12% somewhat satisfied, 71% satisfied

*% of satisfied HA owners compared to 2018

### Trend*
- Professionalism of Audiologist: +/0%
- Quality of Audiologists counseling: +/- 0%
- Quality of service after purchase: -1%
- Quality of service during hearing aid fitting period: -3%
- Clearness of tone and sound: -3%
- Natural sounding: -4%
- Richness or fidelity of sound: -3%
- Comfort with loud sounds: -4%
- Overall fit/Comfort: -1%
- Visibility to others: -1%
- Reliability: -4%
- Managing whistling/feedback/buzzing: +/- 0%
- Ease of changing battery: -7%
- Battery life: -3%
- Value (performance versus money spent): -3%

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

HA-owner, n=494

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Satisfaction with current hearing aids

<table>
<thead>
<tr>
<th>Listening situations</th>
<th>Trend*</th>
</tr>
</thead>
<tbody>
<tr>
<td>When riding in a car</td>
<td>-2%</td>
</tr>
<tr>
<td>Conversation with one Person</td>
<td>-5%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>-3%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>-2%</td>
</tr>
<tr>
<td>At home with family members</td>
<td>-5%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>-4%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>-1%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>-3%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>-7%</td>
</tr>
<tr>
<td>Listening to Music</td>
<td>-2%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>-1%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>-5%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>+1%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>+4%</td>
</tr>
<tr>
<td>In a larger lecture hall (e.g., theater, concert hall,...)</td>
<td>+2%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>+1%</td>
</tr>
<tr>
<td>Use in noisy situations</td>
<td>-2%</td>
</tr>
</tbody>
</table>

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

*% of satisfied HA owners compared to 2018

HA-owner, n=494
Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA

<table>
<thead>
<tr>
<th>HA dispenser / Audiologist</th>
<th>Influence on overall satisfaction with HA*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of service after purchase</td>
<td>0.63</td>
</tr>
<tr>
<td>Quality of Audiologists counseling</td>
<td>0.63</td>
</tr>
<tr>
<td>Quality of service during hearing aid fitting period</td>
<td>0.63</td>
</tr>
<tr>
<td>Professionalism of Audiologist</td>
<td>0.60</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sound quality signal processing</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Richness or fidelity of sound</td>
<td>0.78</td>
</tr>
<tr>
<td>Comfort with loud sounds</td>
<td>0.77</td>
</tr>
<tr>
<td>Cleanness of tone and sound</td>
<td>0.77</td>
</tr>
<tr>
<td>Natural sounding</td>
<td>0.74</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product features</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliability</td>
<td>0.77</td>
</tr>
<tr>
<td>Managing whistling/feedback/buzzing</td>
<td>0.74</td>
</tr>
<tr>
<td>Overall fit/ Comfort</td>
<td>0.68</td>
</tr>
<tr>
<td>Visibility to others</td>
<td>0.67</td>
</tr>
<tr>
<td>Battery life</td>
<td>0.65</td>
</tr>
<tr>
<td>Value (performance versus money spent)</td>
<td>0.65</td>
</tr>
<tr>
<td>Ease of changing battery</td>
<td>0.60</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.
## Important listening situations

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

<table>
<thead>
<tr>
<th>Situation</th>
<th>Hearing Loss Total (n=1317)</th>
<th>Hearing Aid (n=494)</th>
<th>Hearing Loss but no Hearing Aid (n=823)</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home with family members</td>
<td>56%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When talking on a phone</td>
<td>47%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When watching TV with others</td>
<td>45%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In conversations with 1 person</td>
<td>38%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In conversations with small groups</td>
<td>34%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In noisy situations</td>
<td>28%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In conversations with large groups</td>
<td>28%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>21%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In the workplace</td>
<td>21%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When riding in a car</td>
<td>21%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outdoors</td>
<td>18%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In a larger lecture hall (e.g., theater, concert hall, place...)</td>
<td>17%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When talking to children</td>
<td>13%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When listening to music</td>
<td>12%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>During leisure activities (e.g., exercising, taking a walk,...)</td>
<td>12%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>At a movie theater</td>
<td>11%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Positive impact of hearing aids, quality of life
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>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>Social life</td>
<td>3%</td>
<td>4%</td>
<td>22%</td>
<td>53%</td>
<td>18%</td>
</tr>
<tr>
<td>Relationships at home</td>
<td>4%</td>
<td>4%</td>
<td>24%</td>
<td>49%</td>
<td>22%</td>
</tr>
<tr>
<td>Ability to participate in group activities</td>
<td>3%</td>
<td>5%</td>
<td>22%</td>
<td>53%</td>
<td>17%</td>
</tr>
<tr>
<td>Overall ability to communicate more effectively in most situations</td>
<td>2%</td>
<td>5%</td>
<td>23%</td>
<td>52%</td>
<td>18%</td>
</tr>
<tr>
<td>Mental/emotional health</td>
<td>2%</td>
<td>5%</td>
<td>27%</td>
<td>49%</td>
<td>18%</td>
</tr>
<tr>
<td>Sense of independence</td>
<td>2%</td>
<td>5%</td>
<td>27%</td>
<td>49%</td>
<td>18%</td>
</tr>
<tr>
<td>Sense of safety</td>
<td>2%</td>
<td>5%</td>
<td>26%</td>
<td>49%</td>
<td>18%</td>
</tr>
<tr>
<td>Feelings about yourself</td>
<td>2%</td>
<td>4%</td>
<td>31%</td>
<td>43%</td>
<td>20%</td>
</tr>
<tr>
<td>Confidence in yourself</td>
<td>2%</td>
<td>5%</td>
<td>31%</td>
<td>43%</td>
<td>19%</td>
</tr>
<tr>
<td>Mental ability</td>
<td>2%</td>
<td>5%</td>
<td>34%</td>
<td>43%</td>
<td>18%</td>
</tr>
<tr>
<td>Relationships at work</td>
<td>2%</td>
<td>4%</td>
<td>35%</td>
<td>41%</td>
<td>18%</td>
</tr>
<tr>
<td>Physical health</td>
<td>2%</td>
<td>6%</td>
<td>33%</td>
<td>44%</td>
<td>15%</td>
</tr>
<tr>
<td>Success on the job</td>
<td>3%</td>
<td>6%</td>
<td>38%</td>
<td>35%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Significant positive impact of HAs on different aspects: Especially social life, relationships at home, ability to participate in group activities and to communicate more effectively improved.
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

% of HA owners feeling better/a lot better

- Low 50% hearing loss (n=128)
- Top 50% hearing loss (n=342)
83% 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: 83%
- No: 17%

n=494
84% of hearing aid owners who drive a car feel more confident with hearing aids

Since wearing a hearing aid, do you feel more confident driving your car?

- Yes: 61%
- No: 26%
- I don't drive: 12%

n=494
Also for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids.

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

- **Communication with Person**
  - A lot worse: 9%
  - Worse: 25%
  - The same: 39%
  - Better: 26%

- **Social activities together with Person**
  - A lot worse: 7%
  - Worse: 31%
  - The same: 38%
  - Better: 22%

- **Personal relationship with Person**
  - A lot worse: 6%
  - Worse: 34%
  - The same: 38%
  - Better: 21%

- **Quarrels/disputes with Person**
  - A lot worse: 7%
  - Worse: 34%
  - The same: 37%
  - Better: 21%
97% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

How often do your hearing aids improve your quality of life?

- Never: 3%
- Rarely: 11%
- Occasionally: 33%
- Regularly: 52%

n=494
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

|                     | HA Owner  
n=494 | HA-Non-owner Low 50% HL  
n=469 | Non-owner Top 50% HL  
n=218 |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>29%</td>
<td>48%</td>
<td>36%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>71%</td>
<td>52%</td>
<td>64%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>8%</td>
<td>49%</td>
<td>7%</td>
</tr>
<tr>
<td>Moderate</td>
<td>45%</td>
<td>46%</td>
<td>61%</td>
</tr>
<tr>
<td>Severe</td>
<td>42%</td>
<td>4%</td>
<td>27%</td>
</tr>
<tr>
<td>Profound</td>
<td>6%</td>
<td>1%</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>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>41%</td>
<td>25%</td>
<td>34%</td>
</tr>
<tr>
<td>Uncomfortable</td>
<td>40%</td>
<td>24%</td>
<td>35%</td>
</tr>
<tr>
<td>Hearing loss not severe enough</td>
<td>38%</td>
<td>26%</td>
<td>36%</td>
</tr>
<tr>
<td>Cannot afford a hearing aid</td>
<td>39%</td>
<td>23%</td>
<td>38%</td>
</tr>
<tr>
<td>Have more serious priorities</td>
<td>42%</td>
<td>19%</td>
<td>39%</td>
</tr>
<tr>
<td>They do not restore your hearing to normal</td>
<td>40%</td>
<td>21%</td>
<td>39%</td>
</tr>
<tr>
<td>Ear doctors opinion (ENT)</td>
<td>45%</td>
<td>15%</td>
<td>40%</td>
</tr>
<tr>
<td>Would be embarrassed to wear a hearing aid</td>
<td>38%</td>
<td>21%</td>
<td>41%</td>
</tr>
<tr>
<td>They do not work well in noisy situations</td>
<td>36%</td>
<td>21%</td>
<td>43%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>36%</td>
<td>20%</td>
<td>44%</td>
</tr>
</tbody>
</table>
## Less important reasons for not having a hearing aid (II/II)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Not a reason</th>
<th>Somewhat a reason</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bad design</td>
<td>20%</td>
<td>19%</td>
<td>45%</td>
</tr>
<tr>
<td>Family doctors opinion (GP)</td>
<td>39%</td>
<td>14%</td>
<td>47%</td>
</tr>
<tr>
<td>Do not admit I have a hearing loss in public</td>
<td>35%</td>
<td>18%</td>
<td>47%</td>
</tr>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>33%</td>
<td>19%</td>
<td>48%</td>
</tr>
<tr>
<td>Have hearing loss in only one ear</td>
<td>28%</td>
<td>23%</td>
<td>49%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>35%</td>
<td>15%</td>
<td>50%</td>
</tr>
<tr>
<td>Have not had hearing tested yet</td>
<td>22%</td>
<td>11%</td>
<td>51%</td>
</tr>
<tr>
<td>Another hearing aid owners opinion</td>
<td>30%</td>
<td>14%</td>
<td>53%</td>
</tr>
<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>27%</td>
<td>17%</td>
<td>56%</td>
</tr>
<tr>
<td>Audiolists opinion</td>
<td>26%</td>
<td>18%</td>
<td>56%</td>
</tr>
<tr>
<td>I have vision or dexterity problems</td>
<td>24%</td>
<td>18%</td>
<td>58%</td>
</tr>
<tr>
<td>Do not trust Audiologist</td>
<td>28%</td>
<td>13%</td>
<td>59%</td>
</tr>
<tr>
<td>Do not know where to get hearing aids</td>
<td>20%</td>
<td>13%</td>
<td>67%</td>
</tr>
<tr>
<td>Social / Family opinion such as child, spouse, friend</td>
<td>19%</td>
<td>10%</td>
<td>71%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>14%</td>
<td>8%</td>
<td>77%</td>
</tr>
</tbody>
</table>
Top 10 reasons for HA owners NOT using them

- They do not work well in noisy situations: 48% Reason, 52% Somewhat a reason, 0% Not a reason
- Have more serious priorities: 31% Reason, 58% Somewhat a reason, 11% Not a reason
- They do not restore your hearing to normal: 25% Reason, 59% Somewhat a reason, 17% Not a reason
- Uncomfortable: 42% Reason, 38% Somewhat a reason, 20% Not a reason
- Have hearing loss only with high pitch sounds: 25% Reason, 47% Somewhat a reason, 29% Not a reason
- Hear well enough in most situations: 10% Reason, 54% Somewhat a reason, 36% Not a reason
- I have vision or dexterity problems: 59% Reason, 0% Somewhat a reason, 41% Not a reason
- Hearing loss not severe enough: 28% Reason, 30% Somewhat a reason, 42% Not a reason
- Have hearing loss only with low frequency sounds: 44% Reason, 11% Somewhat a reason, 46% Not a reason
- Have hearing loss in only one ear: 33% Reason, 21% Somewhat a reason, 46% Not a reason

Owners who don't use, n=19 (low sample!)
Social rejection because of hearing loss compared to the acceptance of hearing aids
48% 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?

- 48% Never
- 23% Rarely
- 20% Occasionally
- 10% Regularly

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

- 39% Never
- 34% Rarely
- 6% Occasionally
- 6% Regularly

Base: Top 50% hearing loss, no hearing aid n=218
Most important triggers to buy
The most important influencing factors for getting hearing aids are worsening hearing loss, GP, ENT, audiologists and spouse (+price 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)?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Influence</th>
<th>Owner (%)</th>
<th>Non-owner (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENT/ Ear Doctor</td>
<td>46%</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>Hearing loss gets/got worse</td>
<td>42%</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>GP /Family doctor</td>
<td>29%</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Price of hearing aid</td>
<td>10%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>Free due to coverage by Insurance / Received hearing aid free</td>
<td>15%</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Child</td>
<td>12%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Spouse</td>
<td>11%</td>
<td>19%</td>
<td></td>
</tr>
<tr>
<td>Another hearing aid owner (word of mouth)</td>
<td>10%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>HA dispenser / Audiologist</td>
<td>8%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Financial Situation improved</td>
<td>11%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Safety concerns</td>
<td>15%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Relative, friend</td>
<td>10%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>TV advertisement</td>
<td>8%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Hearing loss article or literature</td>
<td>7%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Information/advice about hearing loss from consumer</td>
<td>13%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Internet: Websites of hearing aids manufacturers</td>
<td>7%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Internet: Websites of hearing aid clinics</td>
<td>4%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Newspaper advertisement</td>
<td>3%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Co-worker or boss</td>
<td>7%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Magazine advertisement</td>
<td>4%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Direct mail piece</td>
<td>2%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Internet: Other websites, google...</td>
<td>4%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Radio advertisement</td>
<td>3%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Celebrity or public personality</td>
<td>2%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Telemarketing phone call</td>
<td>2%</td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

2022 the term "un negozio di apparecchi acustici" was used

* = Top 5 influences for HA owners in EuroTrak 2018
❄️ = Top 5 influences for non owners in EuroTrak 2018
The most important trigger to buy a hearing aid is worsening hearing loss, followed by ENT, Audiologist and spouse.

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

- Hearing loss got/gets worse: 25%
- ENT/ Ear Doctor: 20%
- Spouse: 8%
- GP /Family doctor: 7%
- Child: 5%
- Hearing aid dispenser / Audiologist: 5%
- Another hearing aid owner (word of mouth): 3%
- Safety concerns: 3%
- Price of hearing aid: 3%
- Friend / relative: 3%
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 aids</th>
<th>Hearing aids</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>7'343</td>
<td>13.3%</td>
<td>35.1%</td>
<td>47.9%</td>
<td>51.1%</td>
<td>50.9%</td>
</tr>
<tr>
<td>Female</td>
<td>7'867</td>
<td>11.9%</td>
<td>35.2%</td>
<td>52.1%</td>
<td>48.9%</td>
<td>49.1%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 - 14</td>
<td>1'872</td>
<td>2.2%</td>
<td>62.4%</td>
<td>13.8%</td>
<td>1.3%</td>
<td>3.8%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1'474</td>
<td>2.4%</td>
<td>48.7%</td>
<td>10.8%</td>
<td>1.5%</td>
<td>2.6%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>1'643</td>
<td>3.7%</td>
<td>44.6%</td>
<td>11.9%</td>
<td>2.7%</td>
<td>4.1%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1'966</td>
<td>6.6%</td>
<td>42.9%</td>
<td>13.8%</td>
<td>6.0%</td>
<td>8.3%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>2'477</td>
<td>10.7%</td>
<td>22.9%</td>
<td>16.6%</td>
<td>16.5%</td>
<td>9.1%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>2'275</td>
<td>13.6%</td>
<td>27.6%</td>
<td>14.8%</td>
<td>18.2%</td>
<td>12.8%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1'730</td>
<td>22.4%</td>
<td>30.8%</td>
<td>10.1%</td>
<td>21.7%</td>
<td>17.8%</td>
</tr>
<tr>
<td>74+</td>
<td>1'774</td>
<td>38.3%</td>
<td>41.2%</td>
<td>8.2%</td>
<td>32.3%</td>
<td>41.7%</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>1'084</td>
<td>23.2%</td>
<td>36.7%</td>
<td>6.3%</td>
<td>12.9%</td>
<td>13.8%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>2'424</td>
<td>14.7%</td>
<td>33.8%</td>
<td>15.5%</td>
<td>19.1%</td>
<td>18.0%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>9'251</td>
<td>10.2%</td>
<td>36.0%</td>
<td>62.5%</td>
<td>48.6%</td>
<td>50.5%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>915</td>
<td>11.0%</td>
<td>31.1%</td>
<td>6.1%</td>
<td>5.6%</td>
<td>4.6%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>91</td>
<td>39.8%</td>
<td>38.5%</td>
<td>0.4%</td>
<td>1.8%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Other</td>
<td>1'444</td>
<td>15.5%</td>
<td>33.0%</td>
<td>9.2%</td>
<td>12.1%</td>
<td>11.0%</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 aids</th>
<th>Hearing aids</th>
</tr>
</thead>
<tbody>
<tr>
<td>The head of the household (alone or together with someone)</td>
<td>6'322</td>
<td>19.3%</td>
<td>35.0%</td>
<td>38.4%</td>
<td>63.9%</td>
<td>63.6%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>3'724</td>
<td>12.5%</td>
<td>33.2%</td>
<td>24.5%</td>
<td>25.1%</td>
<td>23.0%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>4'504</td>
<td>2.5%</td>
<td>35.8%</td>
<td>33.0%</td>
<td>5.9%</td>
<td>6.1%</td>
</tr>
<tr>
<td>Other person</td>
<td>660</td>
<td>17.0%</td>
<td>43.8%</td>
<td>4.1%</td>
<td>5.1%</td>
<td>7.3%</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>5'146</td>
<td>9.8%</td>
<td>30.6%</td>
<td>40.9%</td>
<td>28.5%</td>
<td>23.9%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>1'271</td>
<td>7.5%</td>
<td>28.0%</td>
<td>10.4%</td>
<td>5.6%</td>
<td>4.1%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>2'032</td>
<td>8.5%</td>
<td>28.2%</td>
<td>16.4%</td>
<td>10.2%</td>
<td>7.6%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
<td>378</td>
<td>28.8%</td>
<td>48.9%</td>
<td>2.4%</td>
<td>4.6%</td>
<td>8.3%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>399</td>
<td>22.8%</td>
<td>38.2%</td>
<td>2.7%</td>
<td>4.6%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>2'798</td>
<td>31.0%</td>
<td>36.3%</td>
<td>17.0%</td>
<td>45.3%</td>
<td>48.9%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>1'184</td>
<td>2.2%</td>
<td>42.4%</td>
<td>10.2%</td>
<td>1.3%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scuola elementare</td>
<td>942</td>
<td>33.6%</td>
<td>34.9%</td>
<td>5.5%</td>
<td>16.8%</td>
<td>17.2%</td>
</tr>
<tr>
<td>Scuola media inferiore</td>
<td>2'194</td>
<td>17.8%</td>
<td>31.3%</td>
<td>15.9%</td>
<td>22.0%</td>
<td>19.0%</td>
</tr>
<tr>
<td>Scuola media superiore</td>
<td>5'279</td>
<td>12.1%</td>
<td>30.9%</td>
<td>40.9%</td>
<td>36.3%</td>
<td>30.8%</td>
</tr>
<tr>
<td>Formazione professionale</td>
<td>1'092</td>
<td>16.7%</td>
<td>44.5%</td>
<td>8.0%</td>
<td>8.3%</td>
<td>12.6%</td>
</tr>
<tr>
<td>Università</td>
<td>3'601</td>
<td>9.2%</td>
<td>39.1%</td>
<td>28.8%</td>
<td>16.6%</td>
<td>20.1%</td>
</tr>
<tr>
<td>Other</td>
<td>99</td>
<td>2.5%</td>
<td>67.2%</td>
<td>0.9%</td>
<td>0.1%</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

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

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

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