

Results

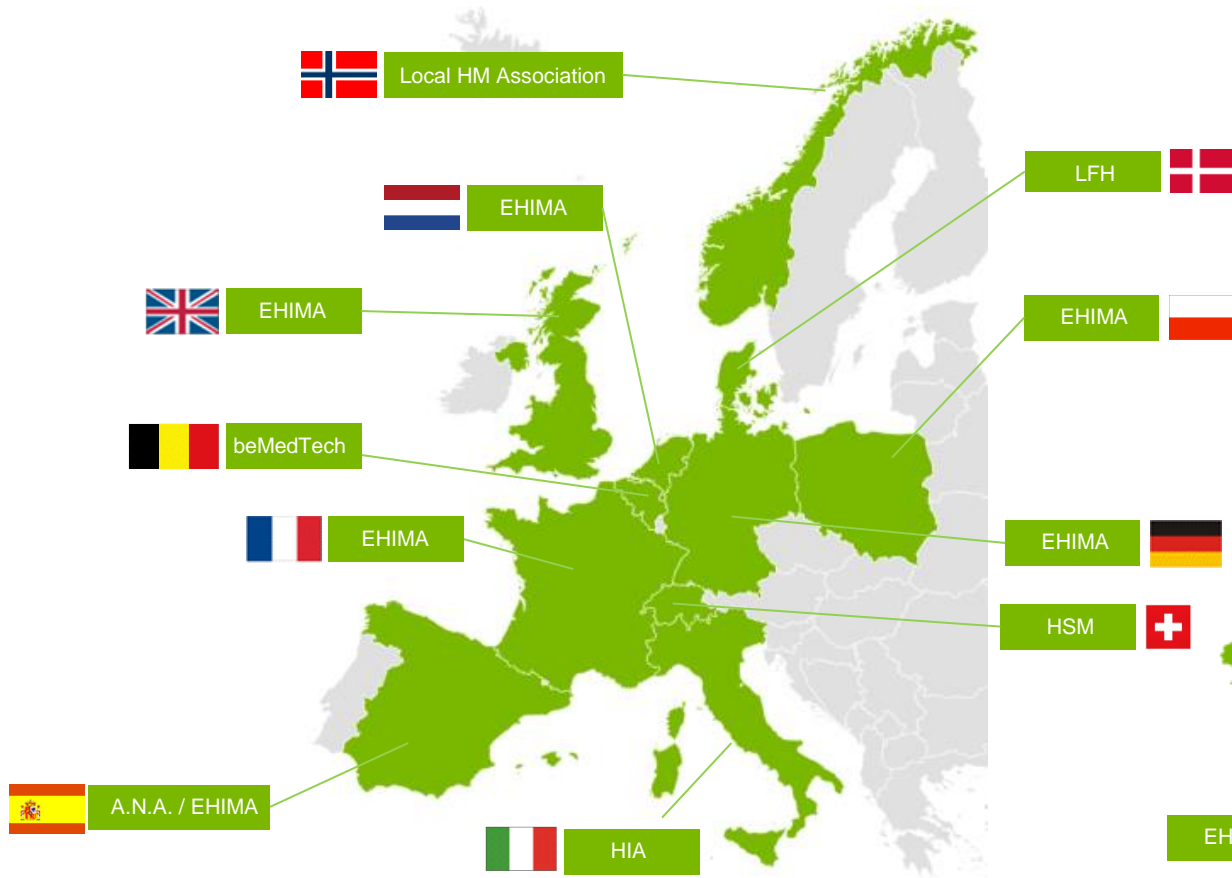
EuroTrak ITA 2022

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 is part of the EuroTrak / APACTrak studies:



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

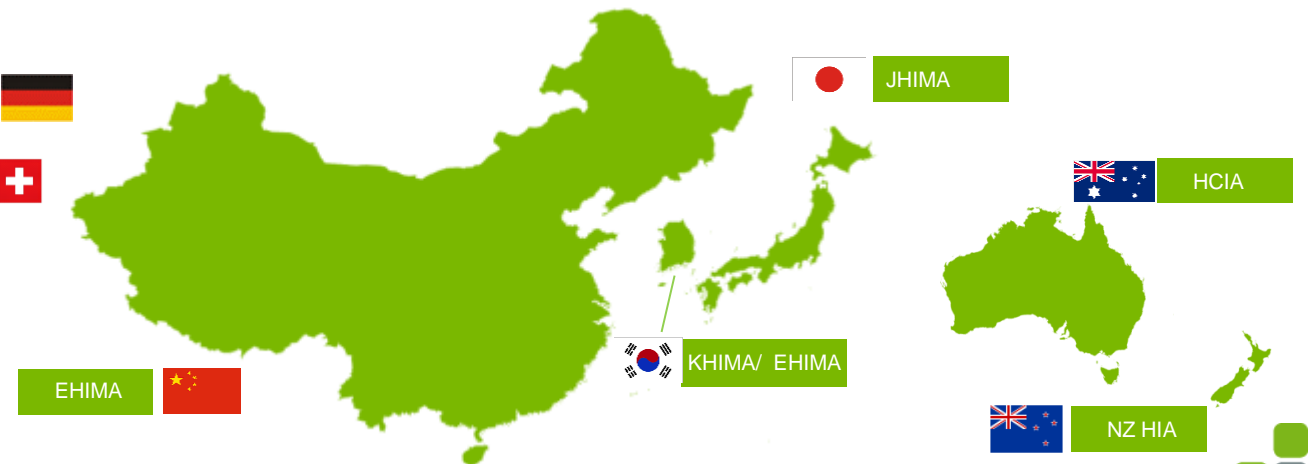
Sample sizes:

Representative sample (sample 1): n=15'210 people

Hearing impaired (sample 2): n=1'317 people

HA owners: n= 494 people

Hearing impaired non-owners: n= 823 people



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

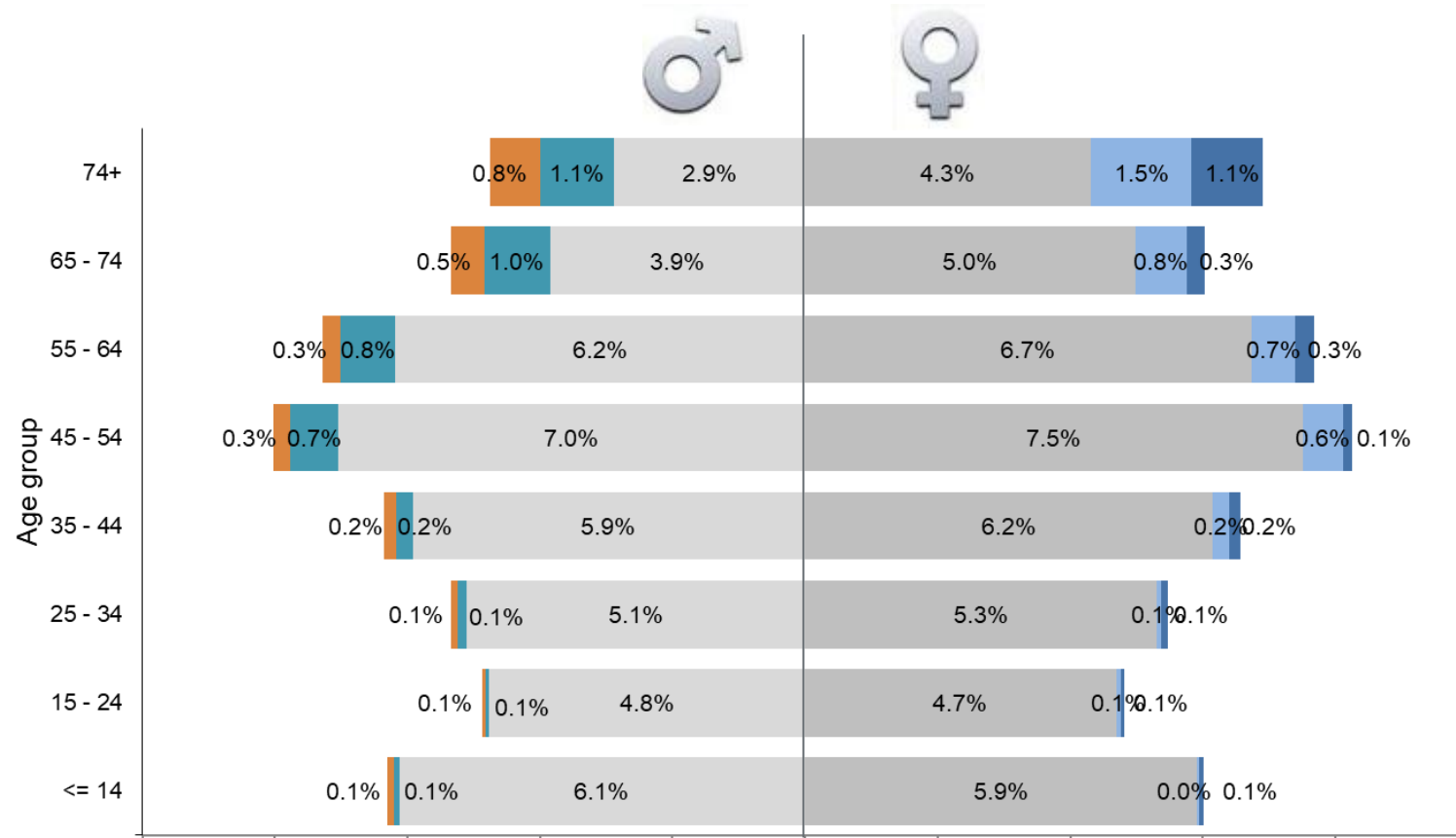
Process:

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



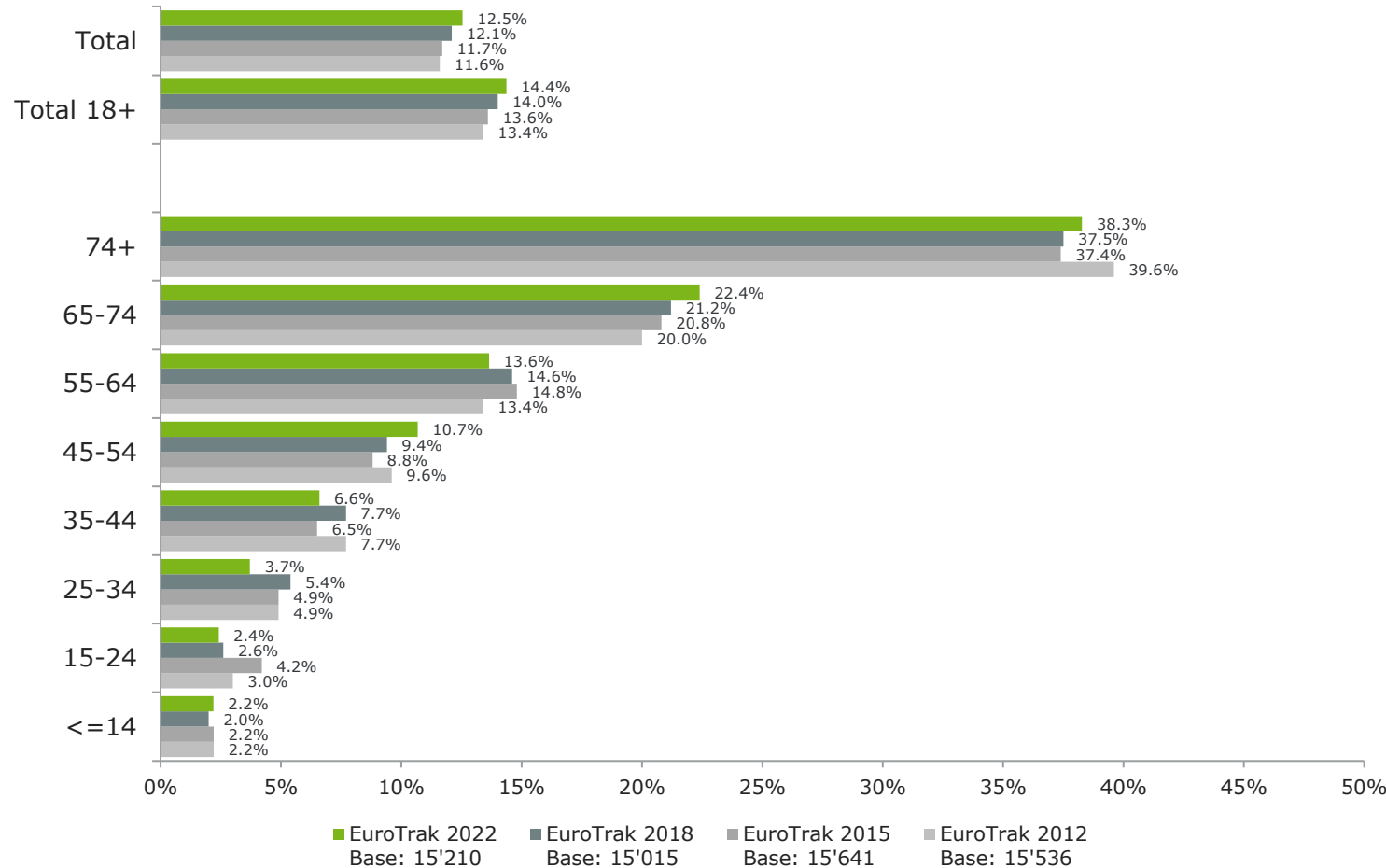
Women: Unimpaired non-owner
 Women: Impaired non-user
 Women: HA owner
 Men: Unimpaired non-owner
 Men: Impaired non-user
 Men: HA owner

n=15'210

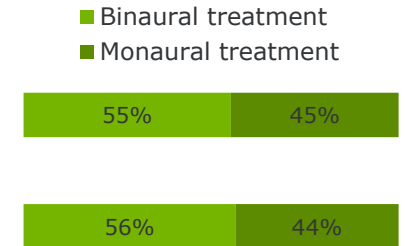
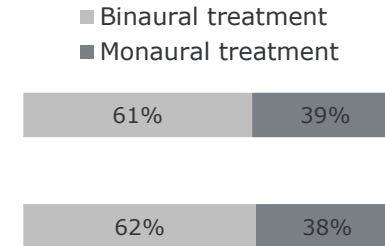
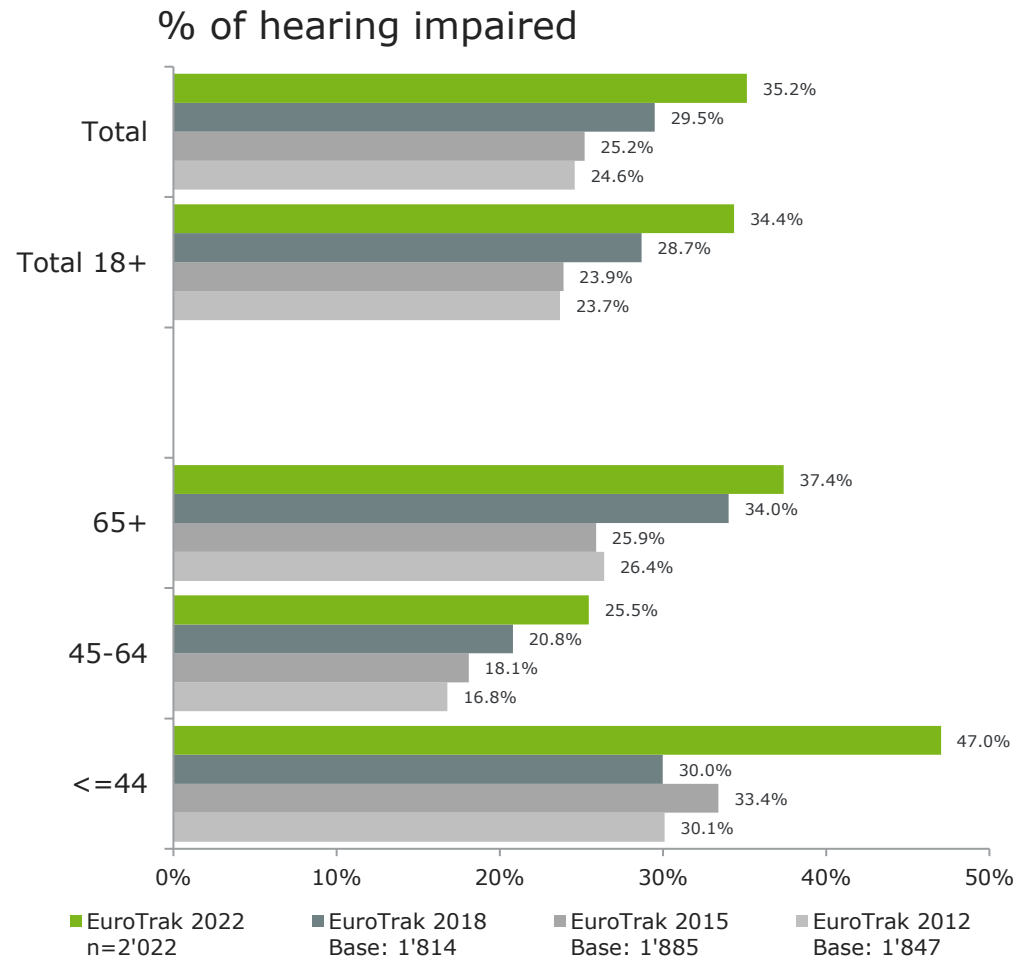
Hearing loss prevalence ITA

Self declared hearing loss

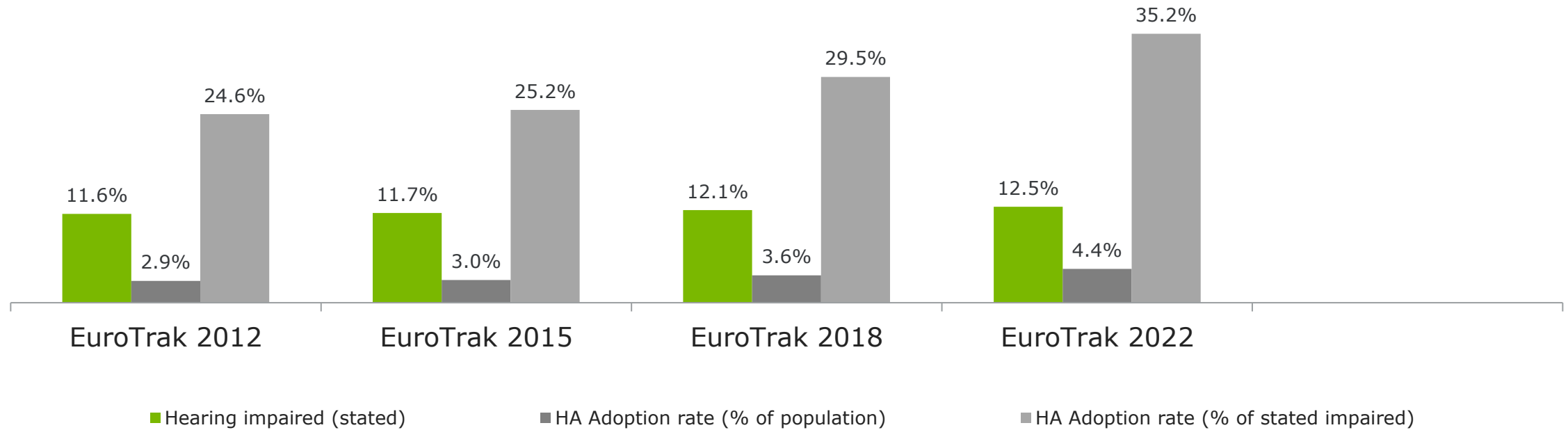
% hearing loss prevalence



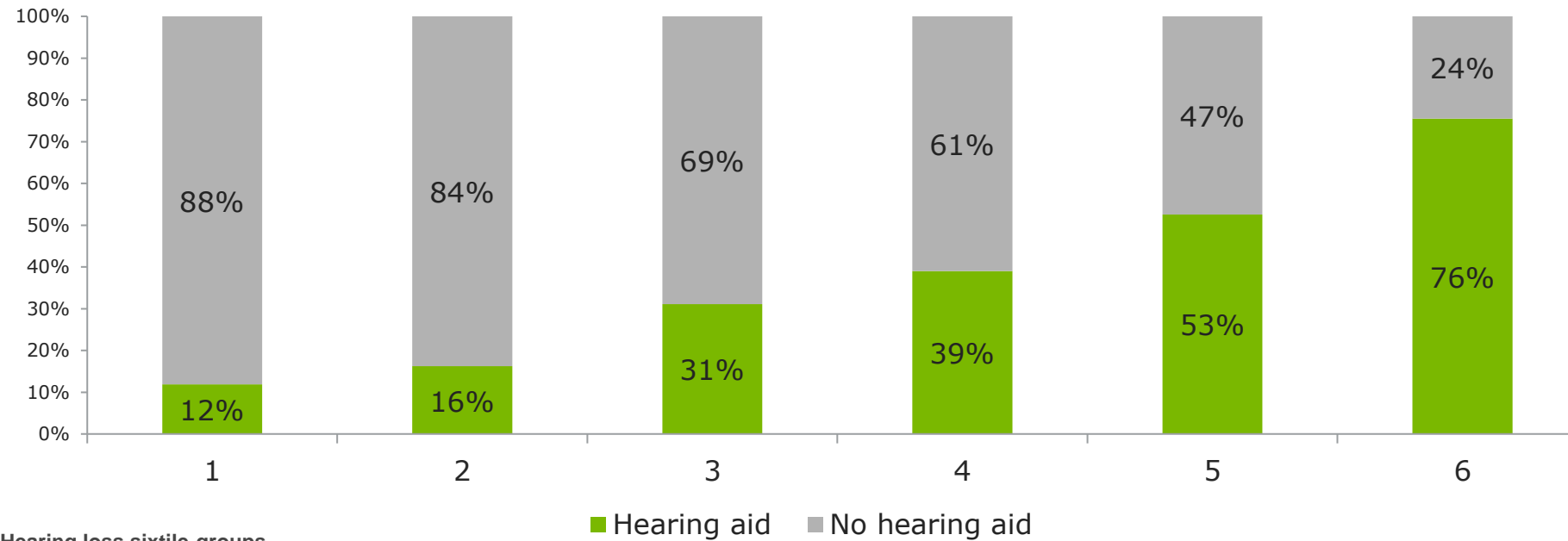
Hearing aid adoption rate: 35% of hearing impaired have hearing aid(s), 55% of them have binaural treatment



Overview hearing loss prevalence and hearing aid adoption



The more severe the hearing loss, the higher the adoption rate



HA-non-owner, n=823
HA-owner, n=494

* 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

Hearing loss characteristics: Owners compared to non-owners

	HA-Non-owner n=823	HA Owner n=494	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	43%	29%	28%
Bilateral loss	57%	71%	43%
Perceived loss			
Mild	37%	8%	10%
Moderate	50%	45%	33%
Severe	11%	42%	66%*
Profound	2%	6%	

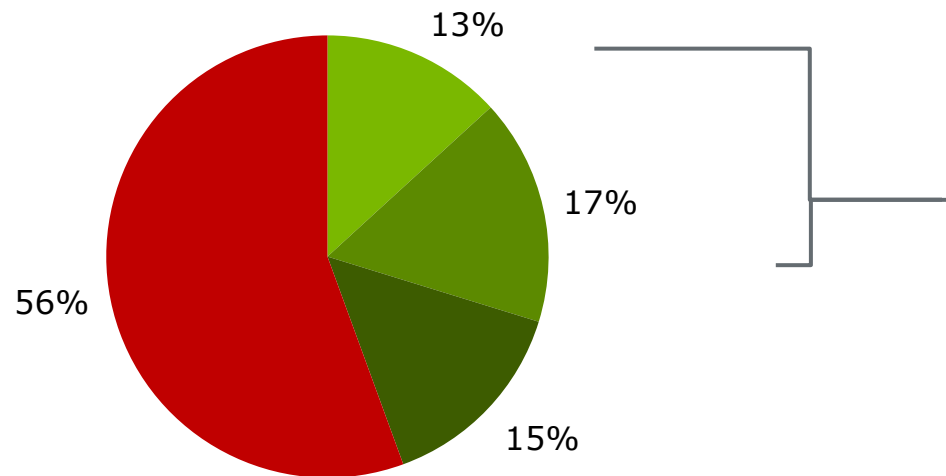
* combined "severe" and "profound" because n is too small

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

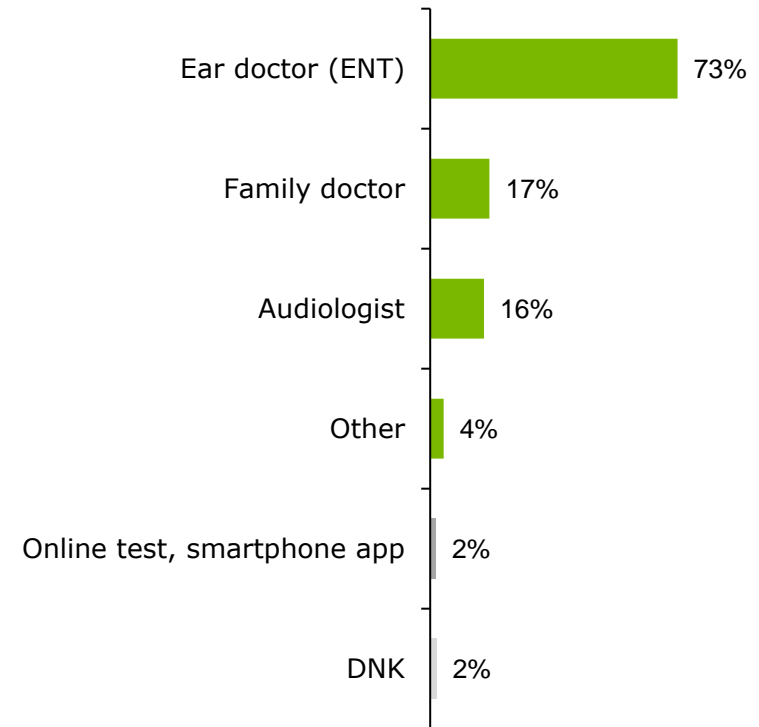
Have you ever taken a hearing test?

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



Base=13'450

Where/how was your hearing tested?



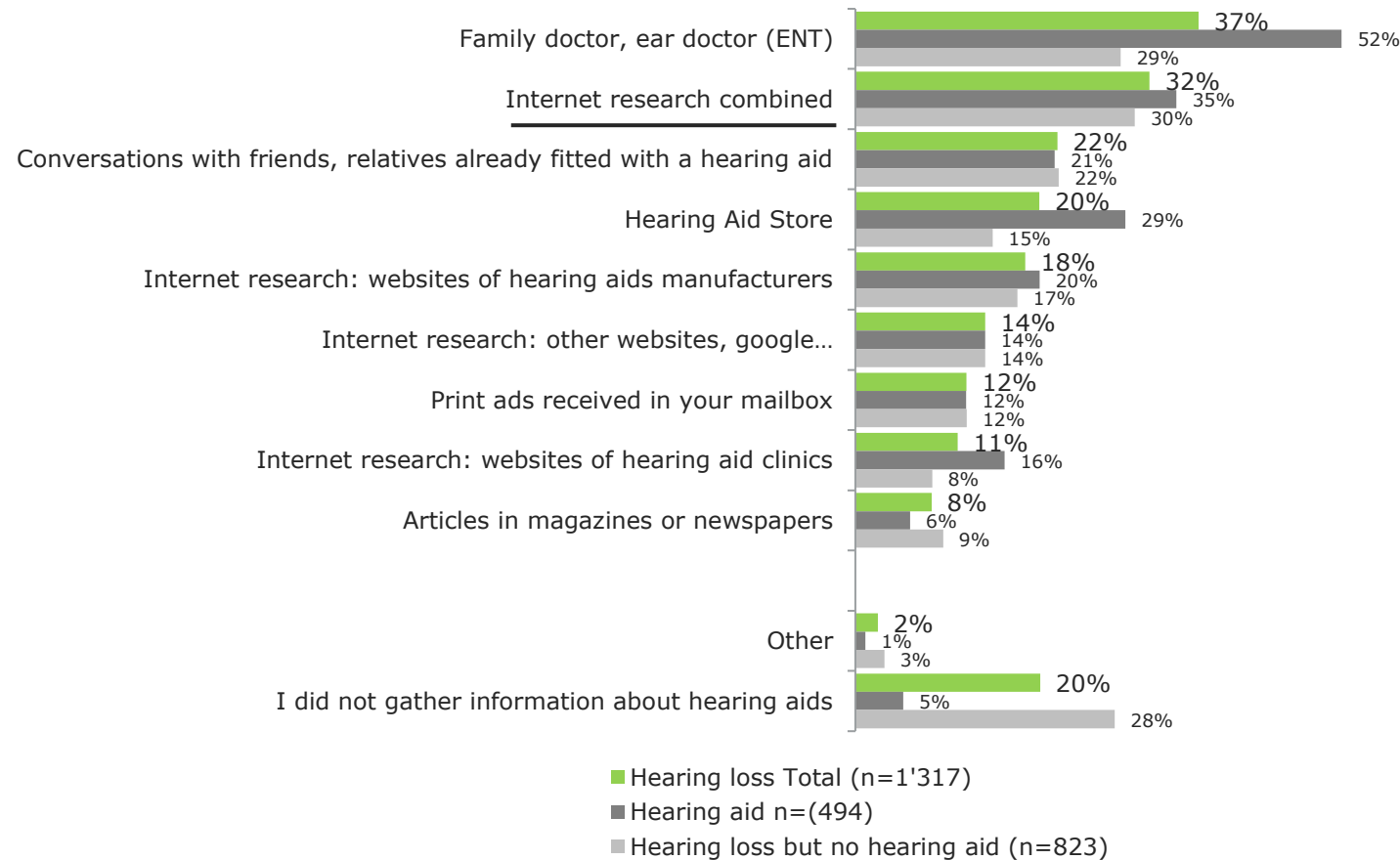
Base= 4'040



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

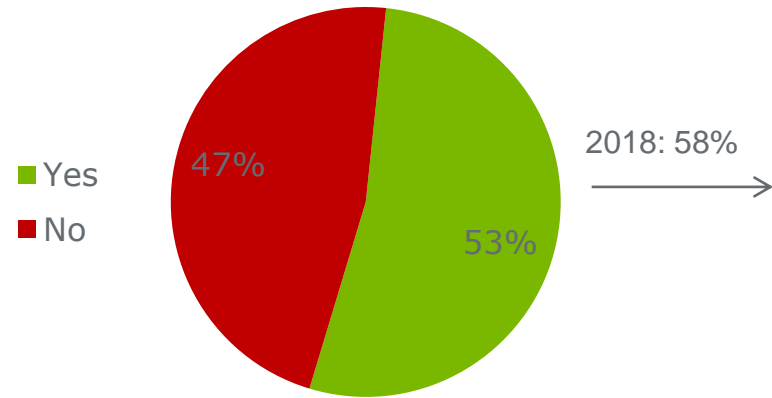
Where did you gather information about hearing aids?



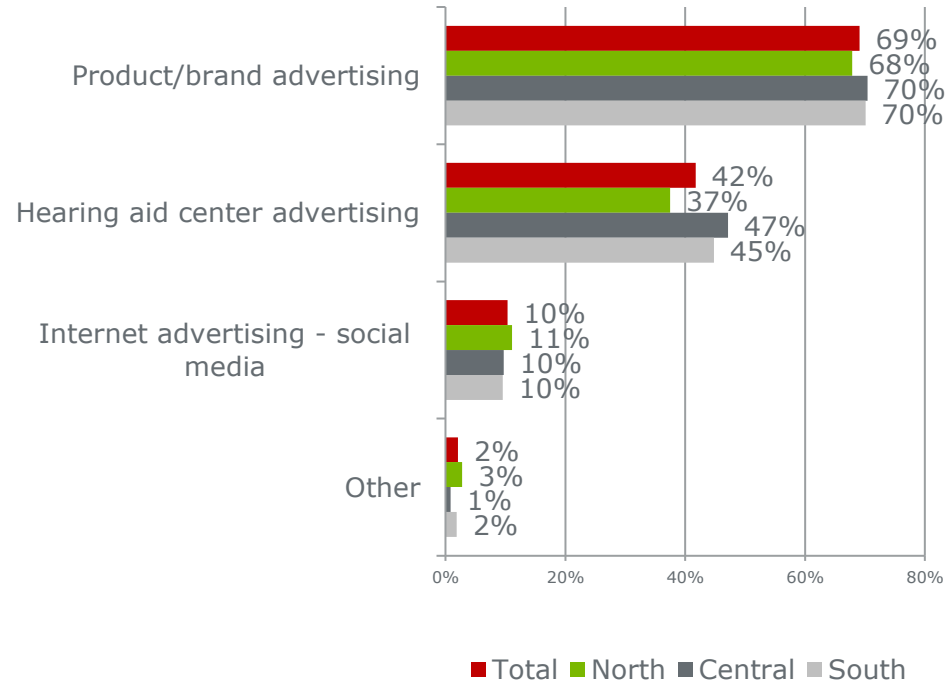
53% of all hearing impaired have seen hearing aids advertisement recently (2018: 58%)

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:')



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



*multiple responses possible (sum doesn't add up to 100%)

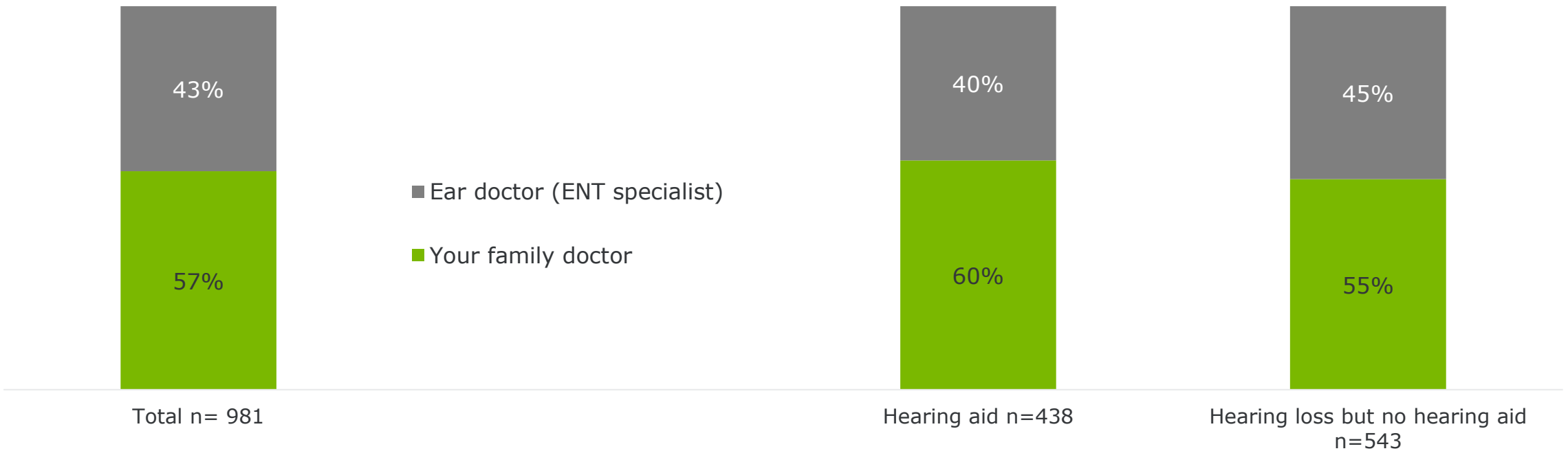
Hearing impaired, n=1'317

Italy specific question

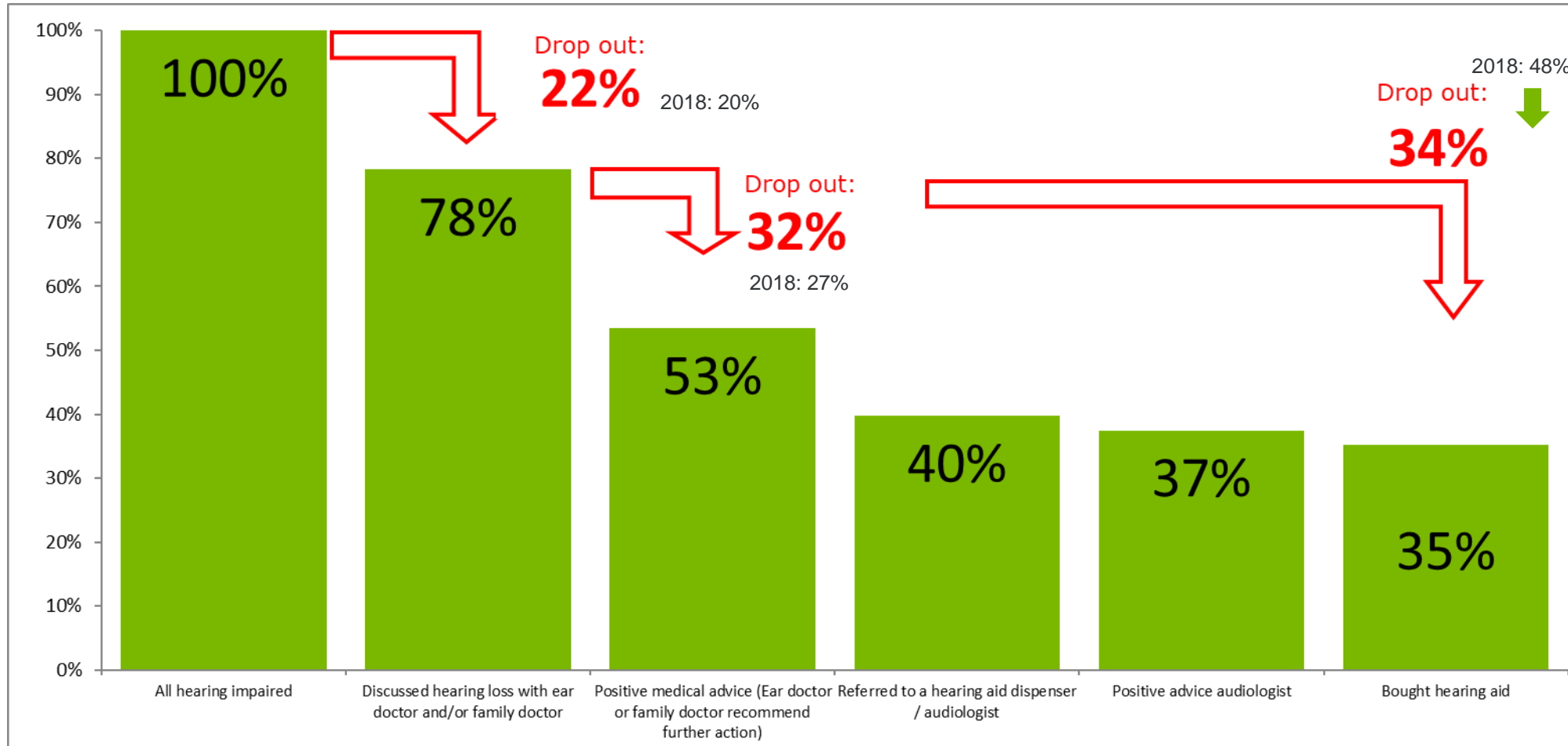


Of those who discussed the hearing loss with a doctor, 57% talked to a family doctor (GP) first and 43% talked to an ENT first

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)?



The route to the hearing aid

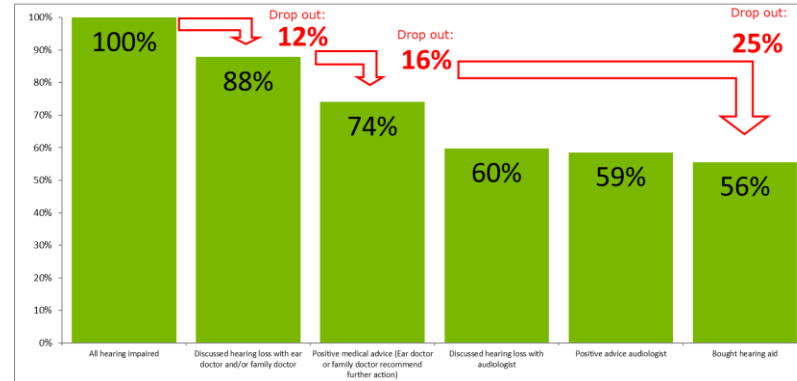


n=1'317

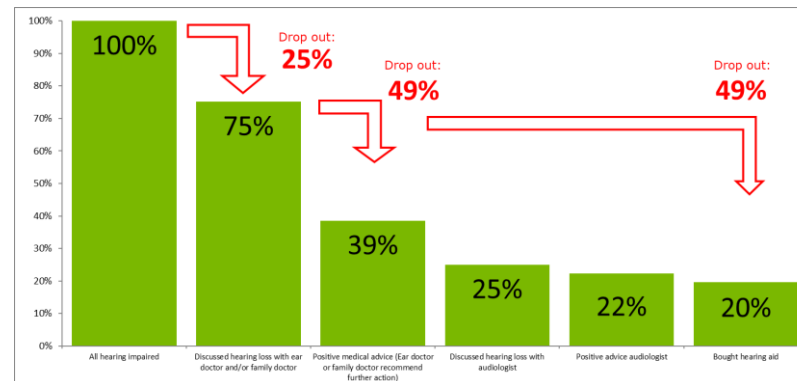
2022 the term "un negozio di apparecchi acustici" was used

Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*



Low 50% hearing loss*



n=1'317

* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

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

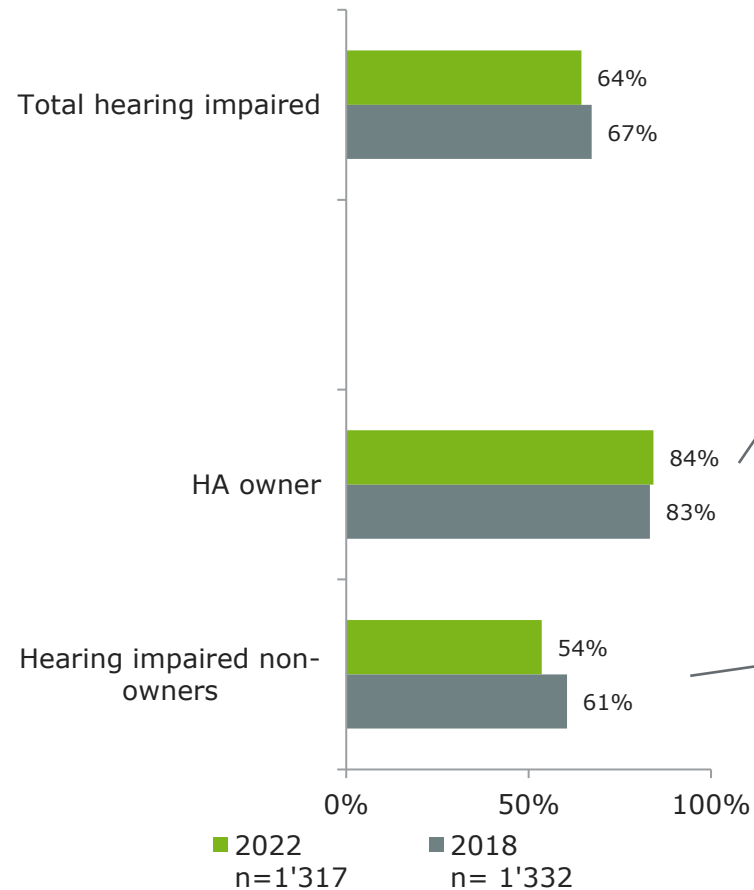
→ People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).



The route to the hearing aid: GP/Family doctor

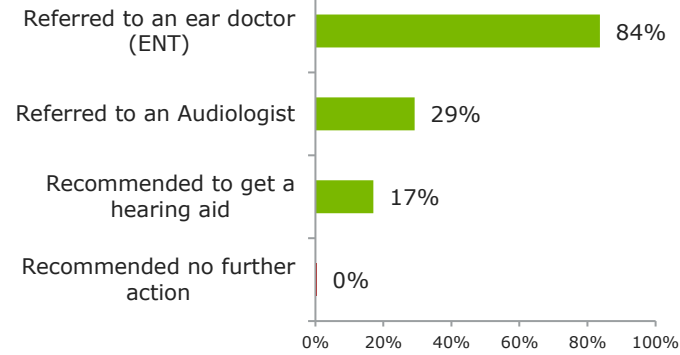
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

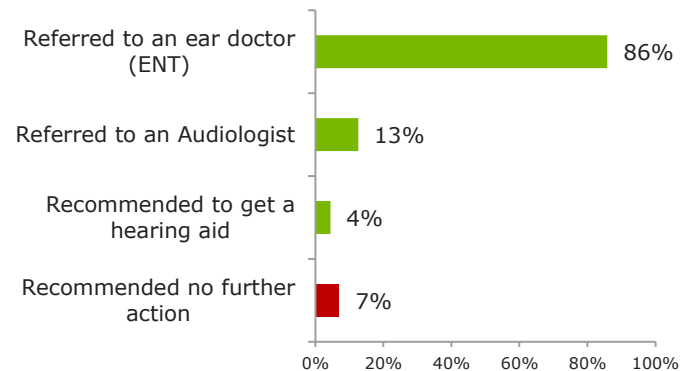


What did he/she recommend ?

HA owner (n=401)



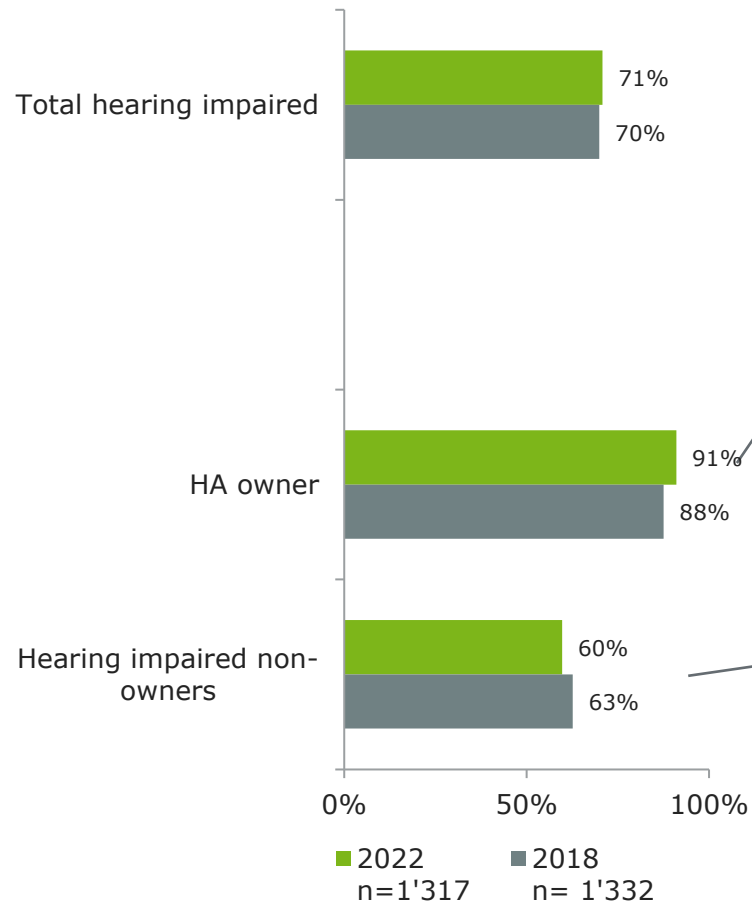
Impaired non-owner (n=419)



The route to the hearing aid: ENT

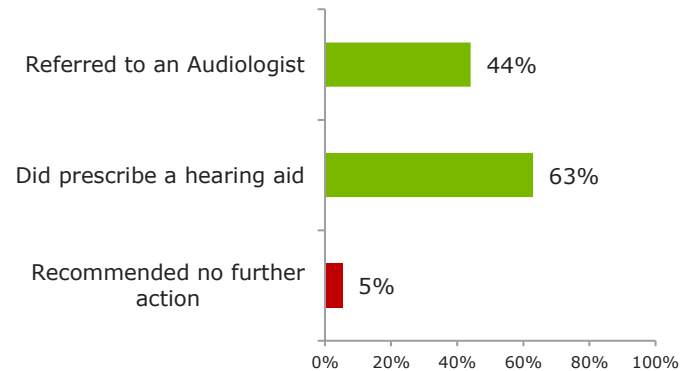
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

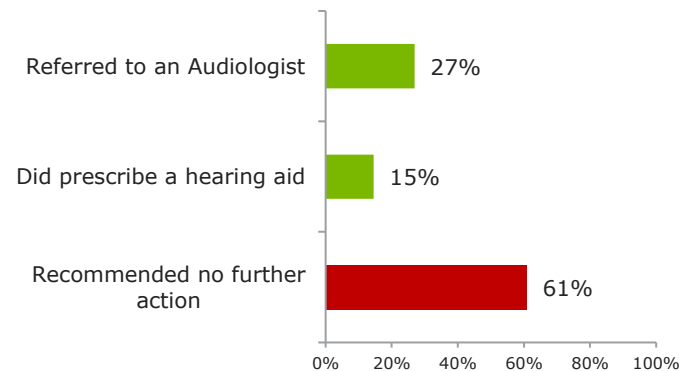


What did he/she recommend ?

HA owner (n=430)



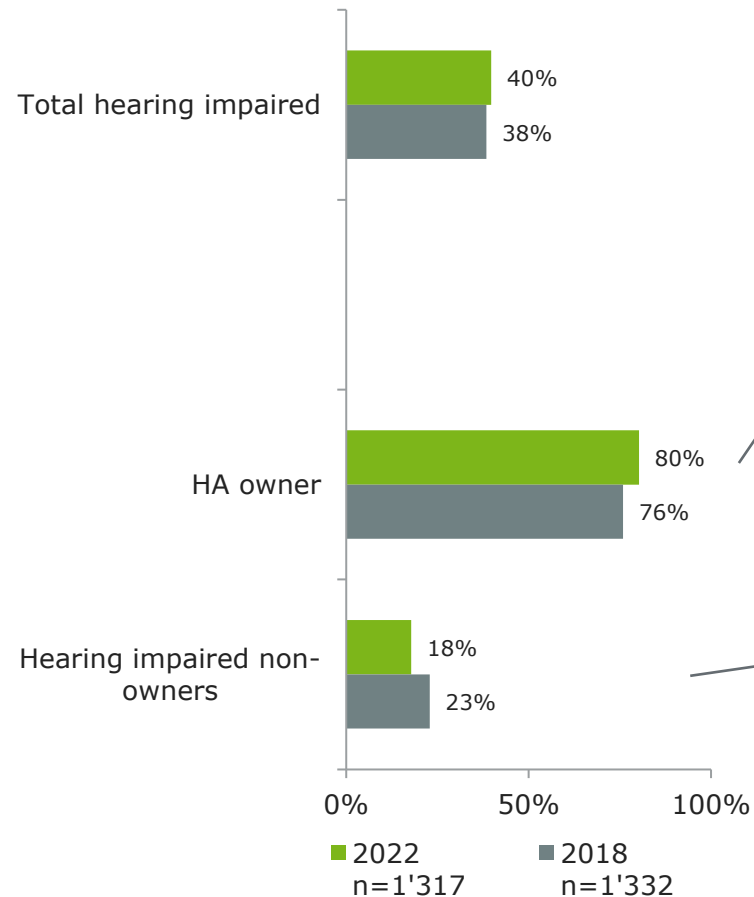
Impaired non-owner (n=484)



The route to the hearing aid: Audiologist

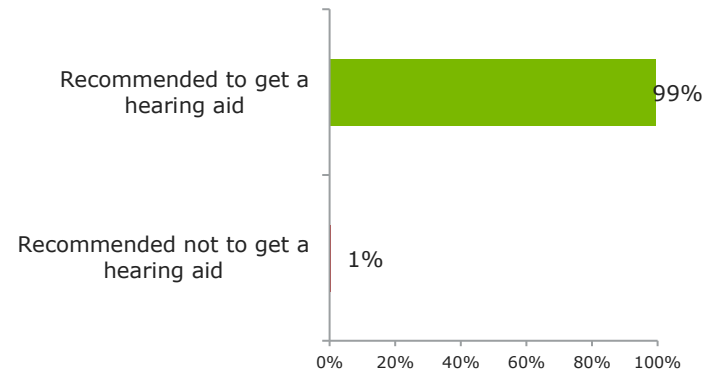
Have you ever discussed your hearing problem with a HA dispenser / Audiologist?

% Discussed with hearing aid dispenser / Audiologist

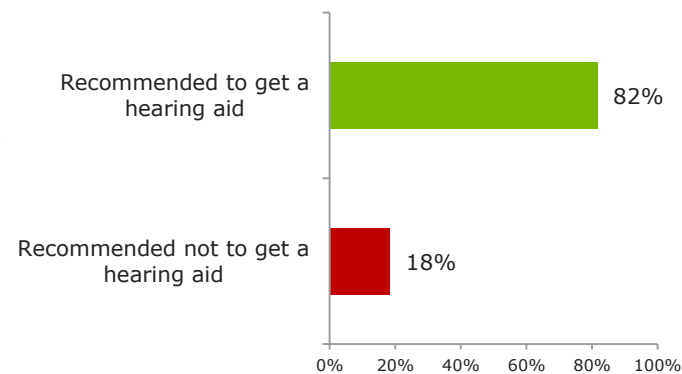


What did he/she recommend ?

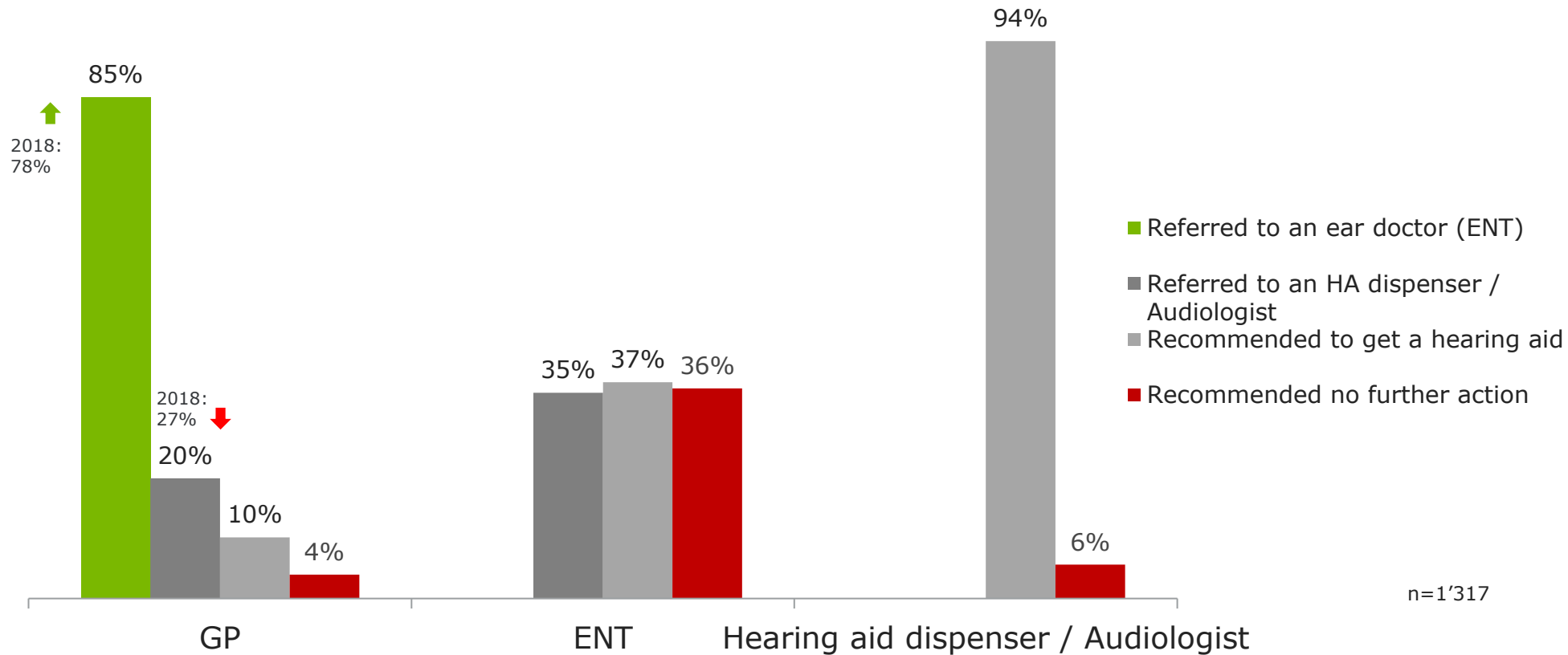
HA owner (n=386)



Impaired non-owner (n=137)



Recommendations by profession



n=1'317

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 ■ No, I went to the audiologist first

[IF SEEN THE AUDIOLOGIST FIRST]

Did the HA dispenser / Audiologist refer you to the family doctor? (n=42)



■ Yes ■ No, I decided by myself

[IF SEEN ENT & AUDIOLOGIST]

Did you discuss your hearing loss with the ear doctor (ENT) BEFORE visiting the HA dispenser / Audiologist? (n=469)



■ Yes ■ No, I went to the audiologist first

[IF SEEN THE AUDIOLOGIST FIRST]

Did the HA dispenser / Audiologist refer you to the ear doctor (ENT)? (n=30)



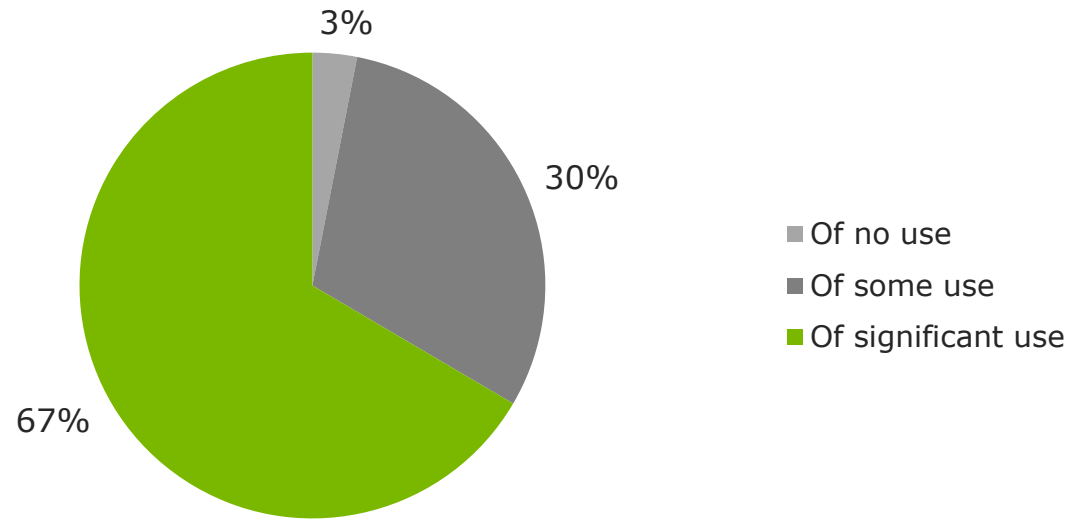
■ Yes ■ No, I decided by myself



Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities

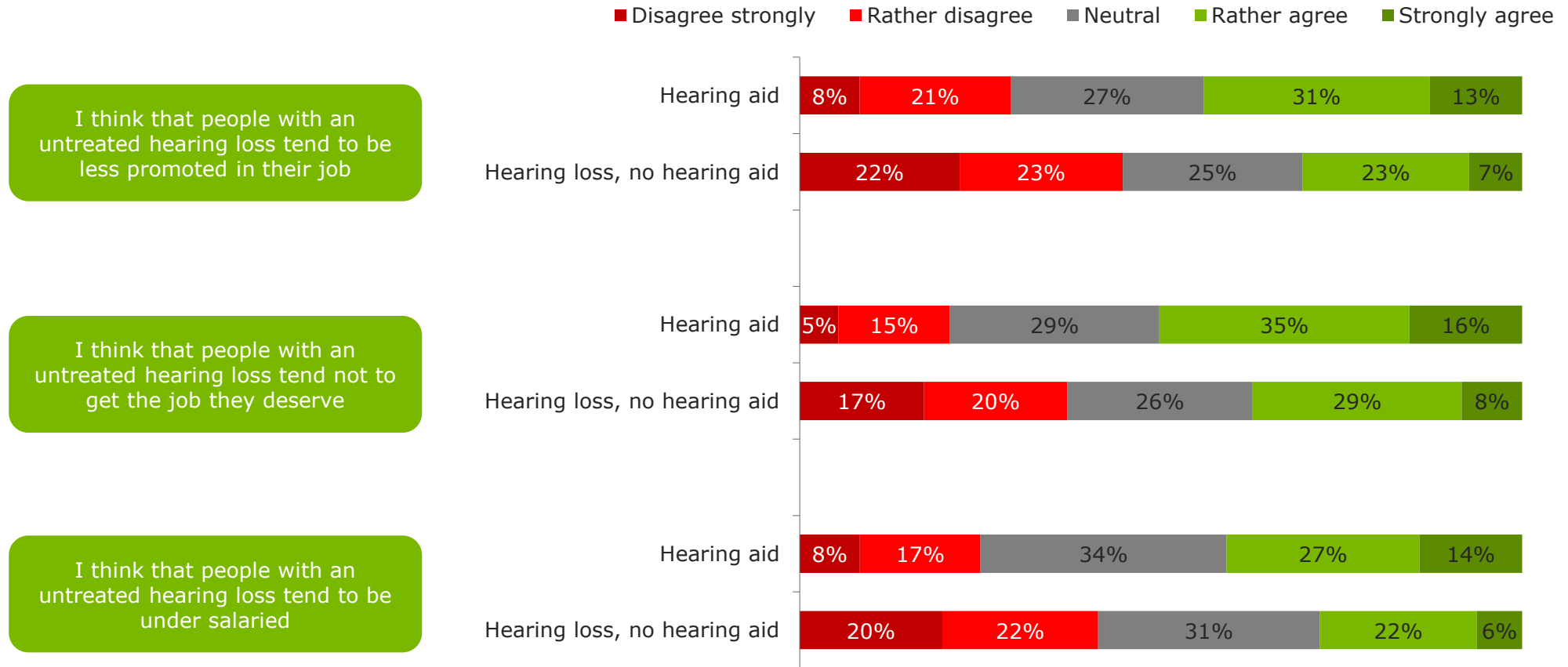
Work competitiveness: 97% of the working hearing aid owners state their hearing aid(s) are useful on their job

How useful are your hearing aids on your job?



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



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



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*)

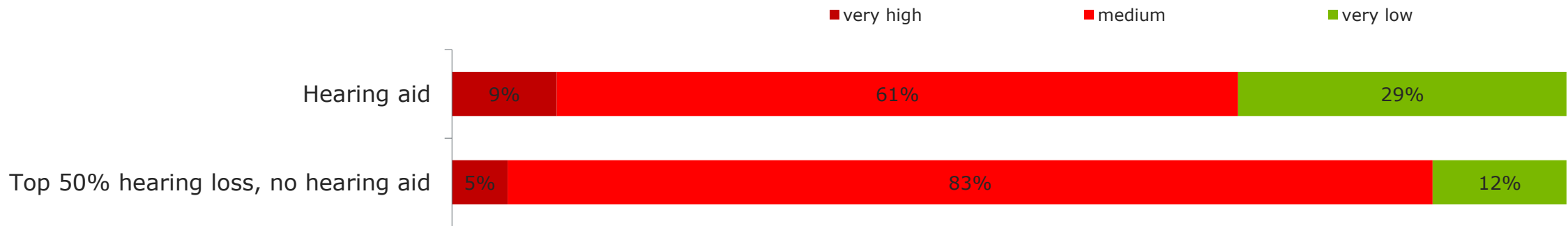
Depression symptoms:

PHQ-2 Screening:

In the last 2 weeks:

- Little interest or pleasure
- Feeling down, depressed, hopeless

Probability of major depressive disorder



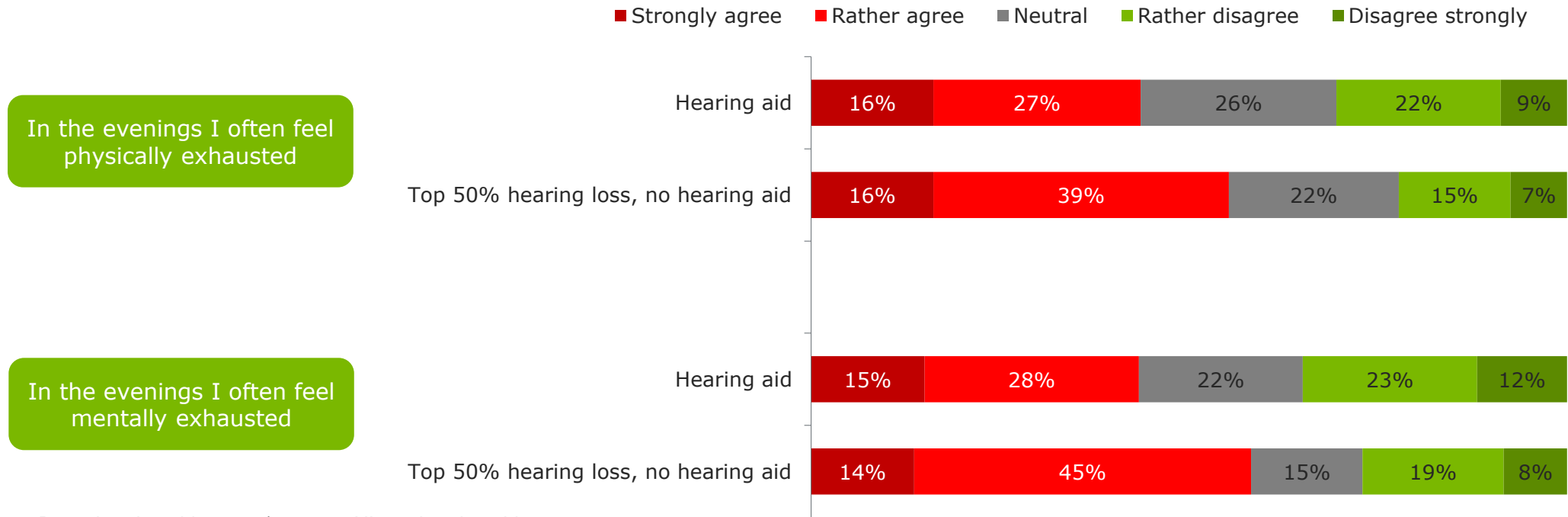
Base: hearing aid n=286 / top 50% HL, no hearing aid =117

*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



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:

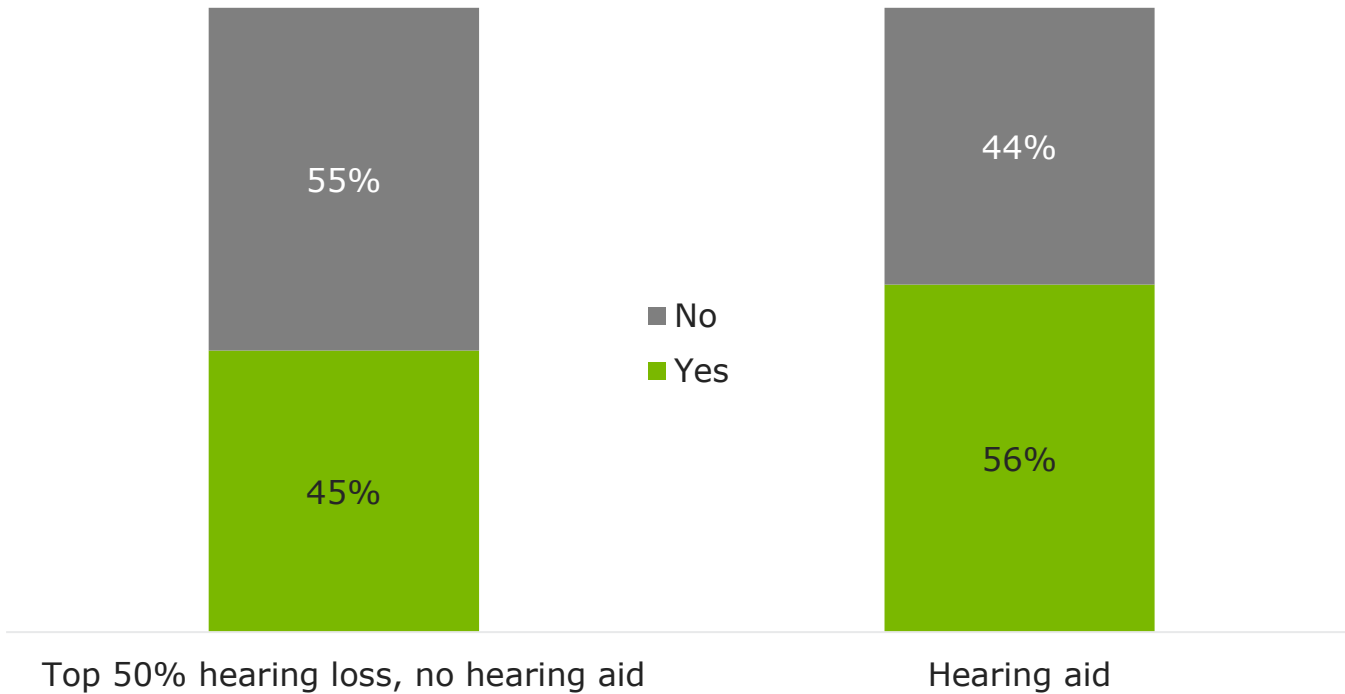
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC - like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

→ 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

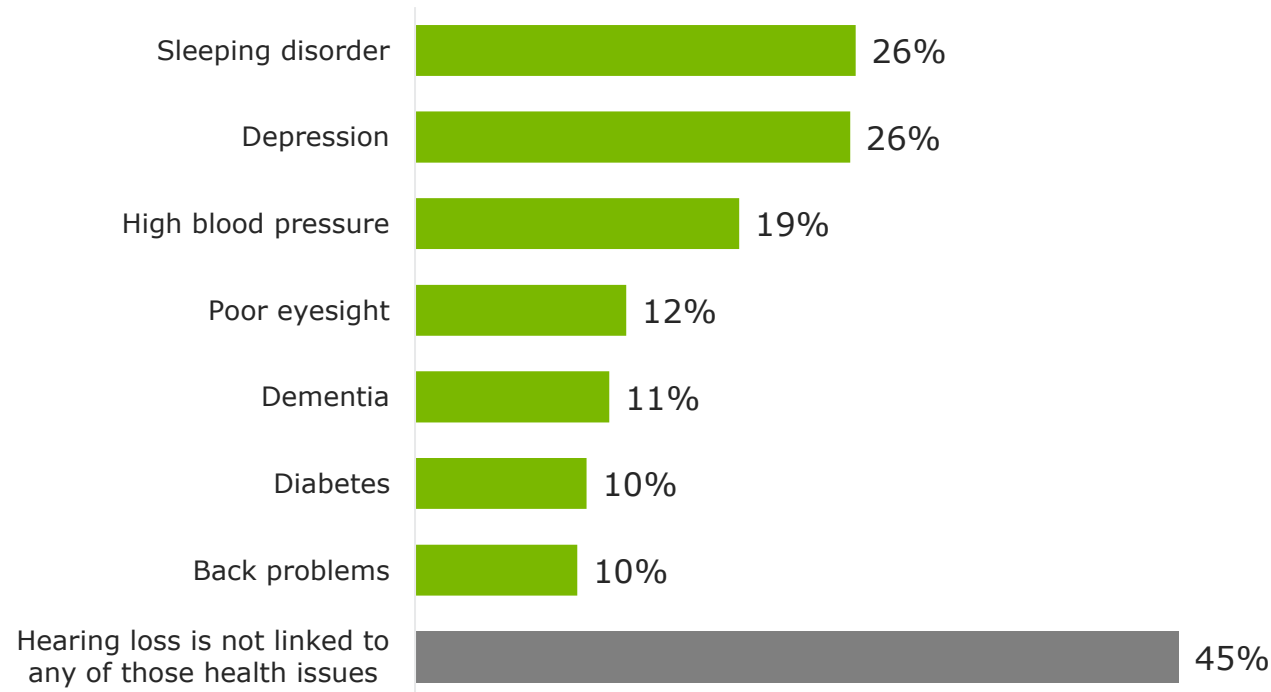
Are you generally satisfied with the quality of your sleep?



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.

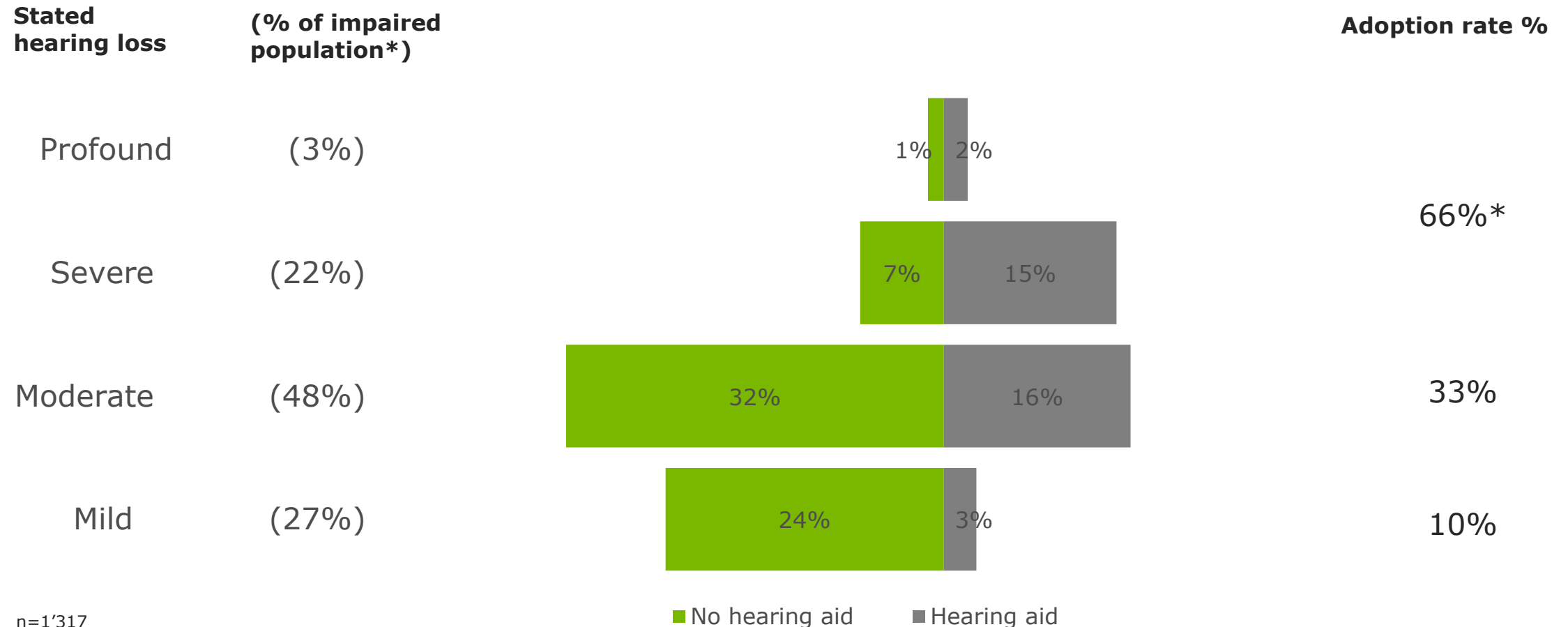


Hearing impaired, n=1'317

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



n=1'317

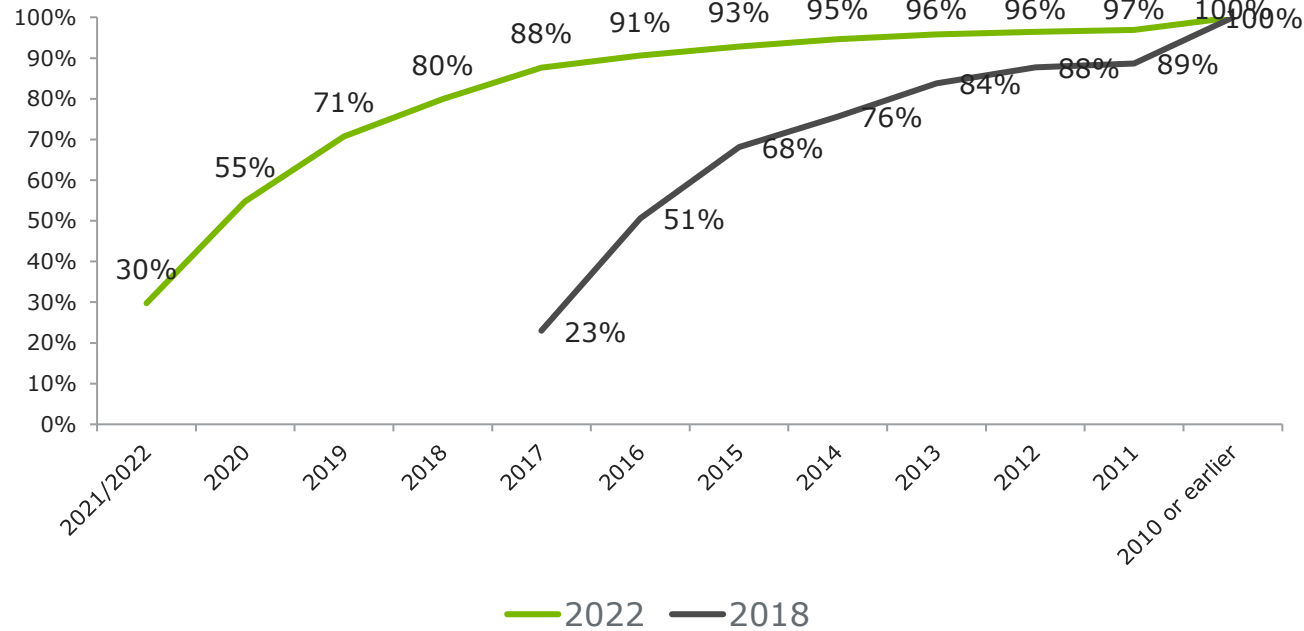
Sums can differ from 100% due to rounding

* combined "severe" and "profound" because n is too small



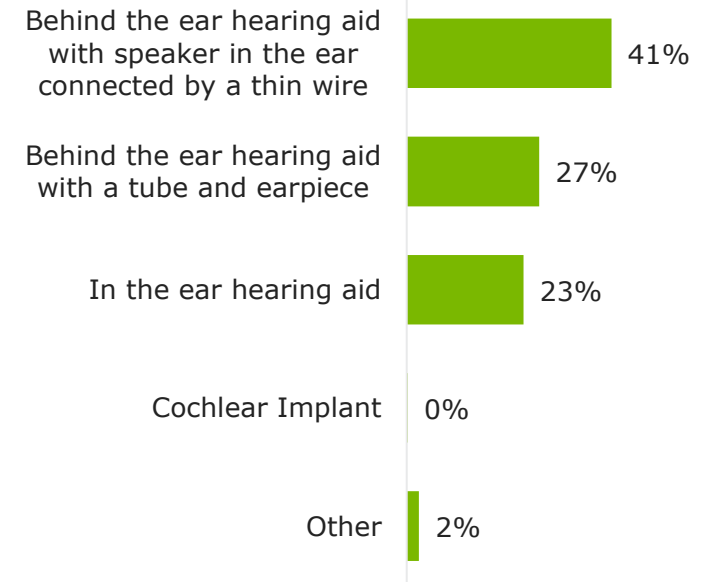
71% of the currently owned HAs were acquired in 2019 or later
 RIC is the most often purchased type of HA.

Year of purchase



Age of currently owned HAs (Mean):
 2022: 3.2 years
 2018: 2.9 years

Type of HA

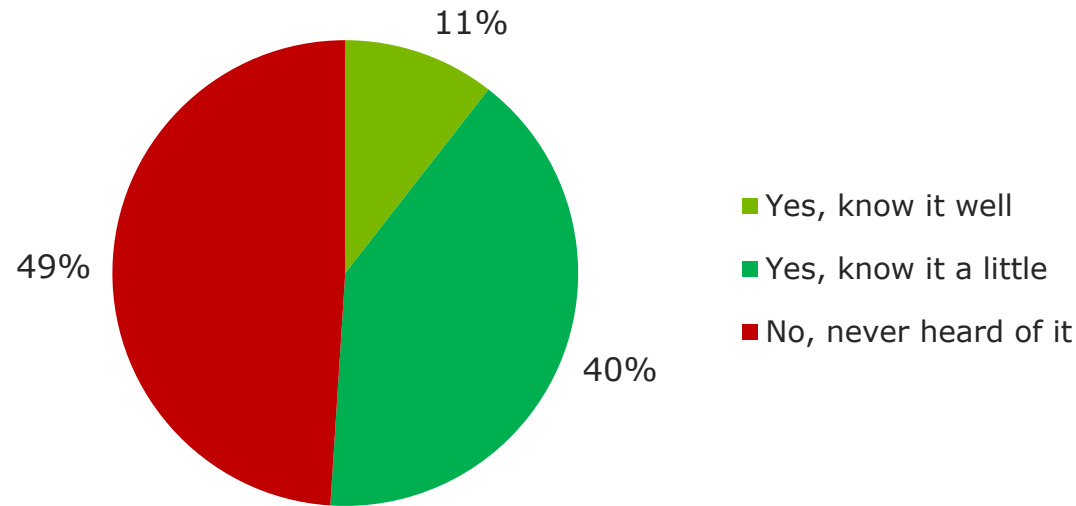


HA-owner, n=494



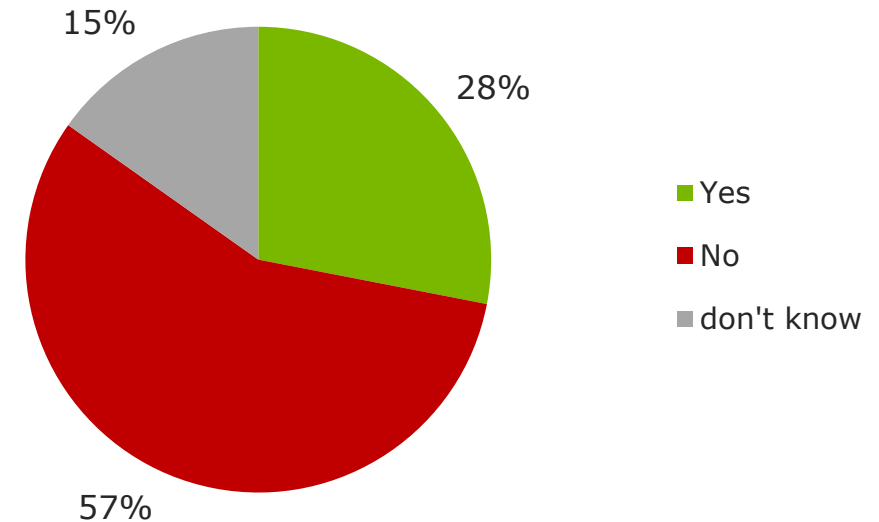
49% of the population in ITA have never heard of Cochlear Implants.
 28% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.

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



n=4'056

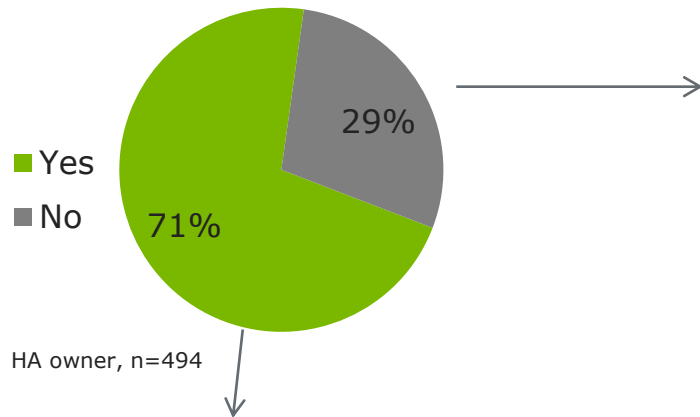
Have you been informed about cochlear implants by a medical professional?



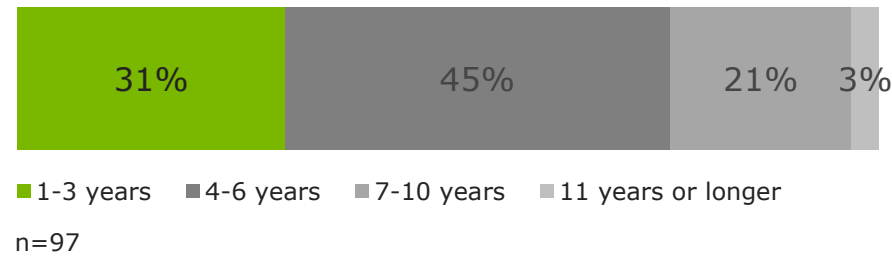
n=181 (HA owners with severe/profound HL)

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.

Current HAs = first HAs?



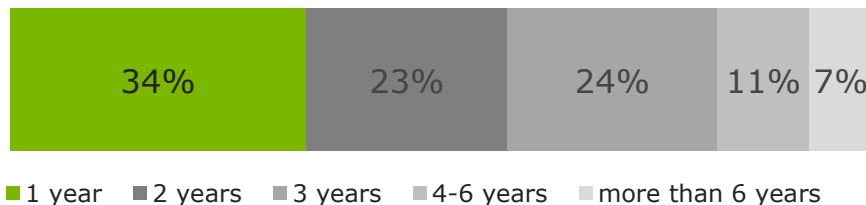
How many years did you own your previous HAs?



Age of HA before it has been replaced:
 2022: 5 years (median)
 2018: 4 years (median)

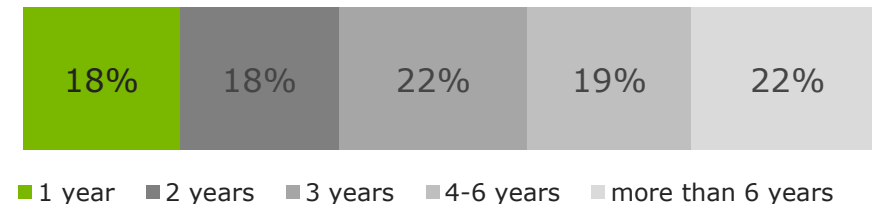
HA owners (1st HA):

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?



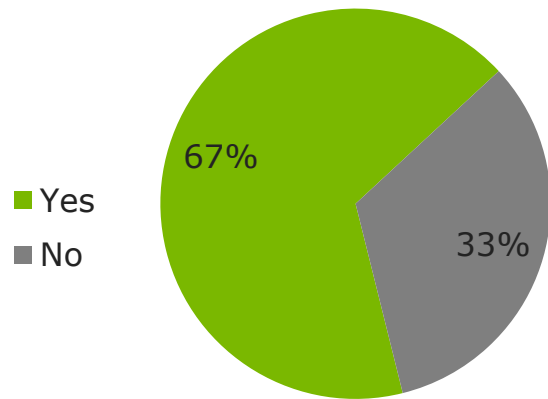
HA non owners:

How many years had passed since you became aware of your hearing loss?



67% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on social life.

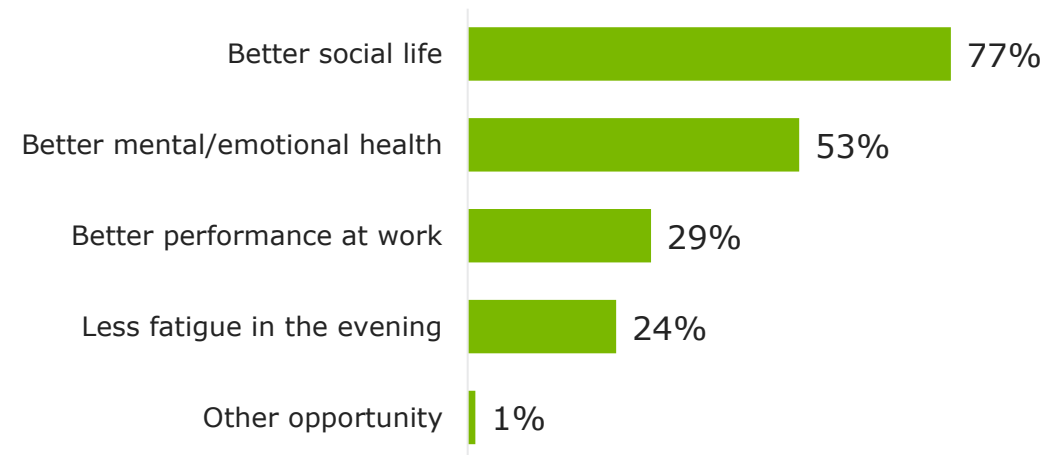
Thinking back before you obtained your first hearing aid(s): do you think, you should have gotten them sooner?



HA-owner, n=494

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



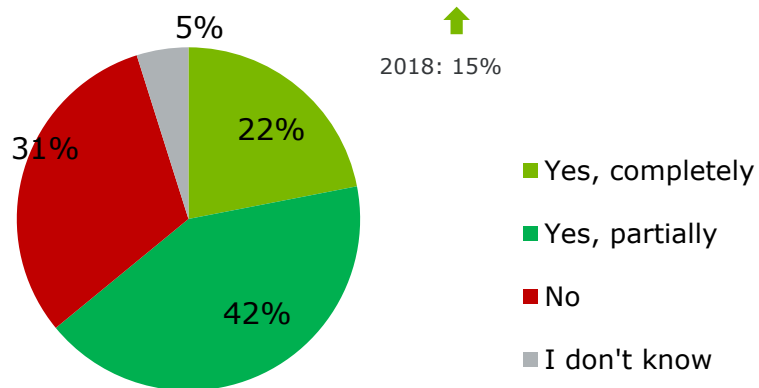
n=349



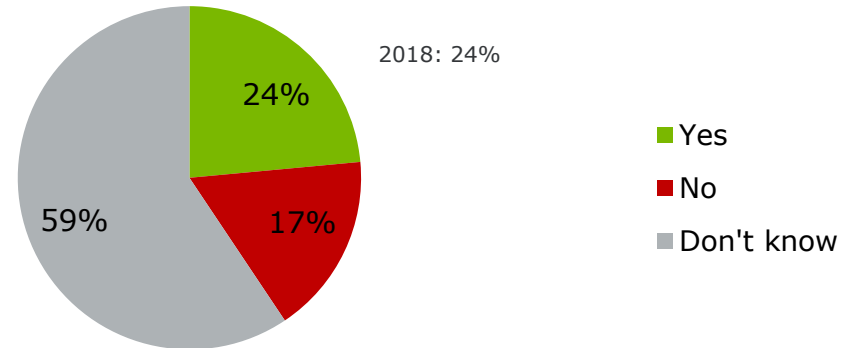
64% of the hearing aid owners received some kind of third party reimbursement. A majority of hearing impaired without hearing aids don't know whether a third party would pay any part of hearing aids.

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

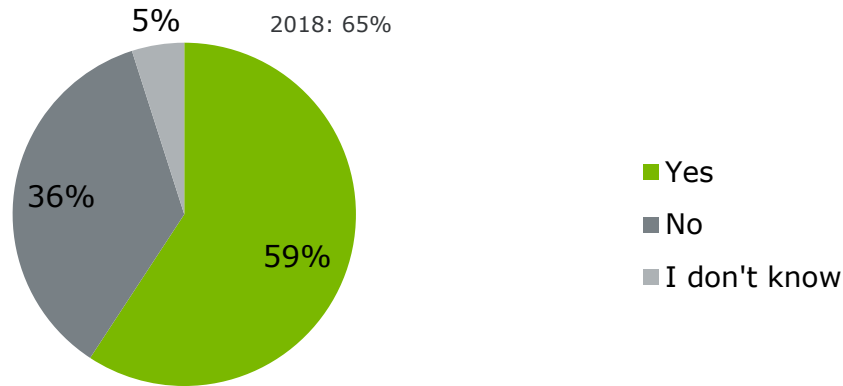


HA-non-owners, n=823

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.

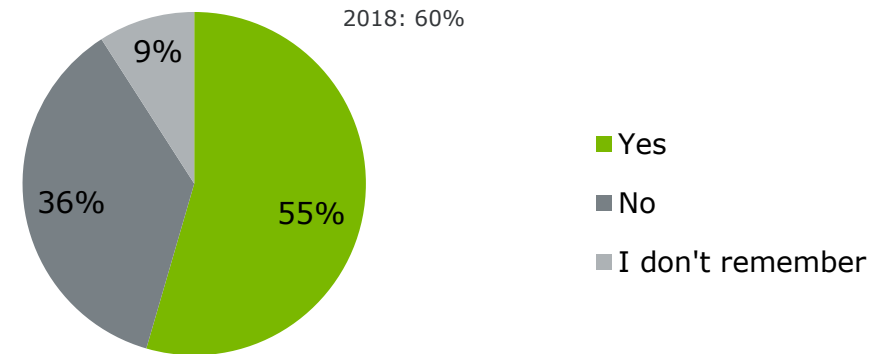
[IF REIMBURSEMENT RECEIVED]

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



HA-owner with reimbursement, n=297

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



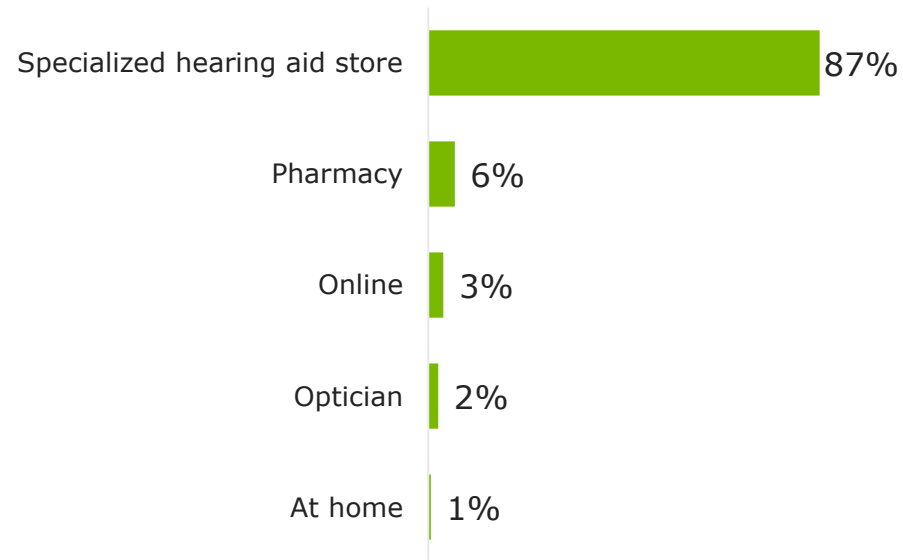
HA-owner, n=494



A specialized hearing aid store is the preferred place for obtaining hearing aids (both for owners and non-owners)

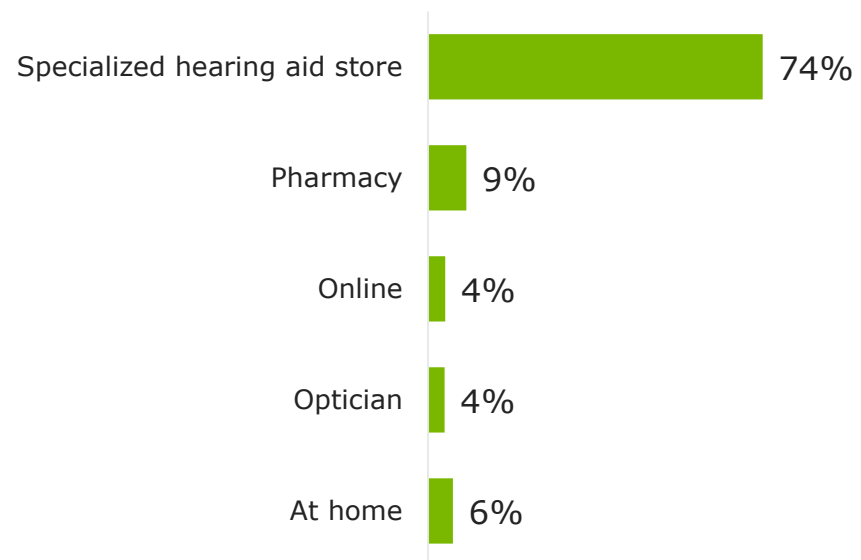
Owners:

Where was your most current hearing aid obtained?



HA-owner, n=494

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

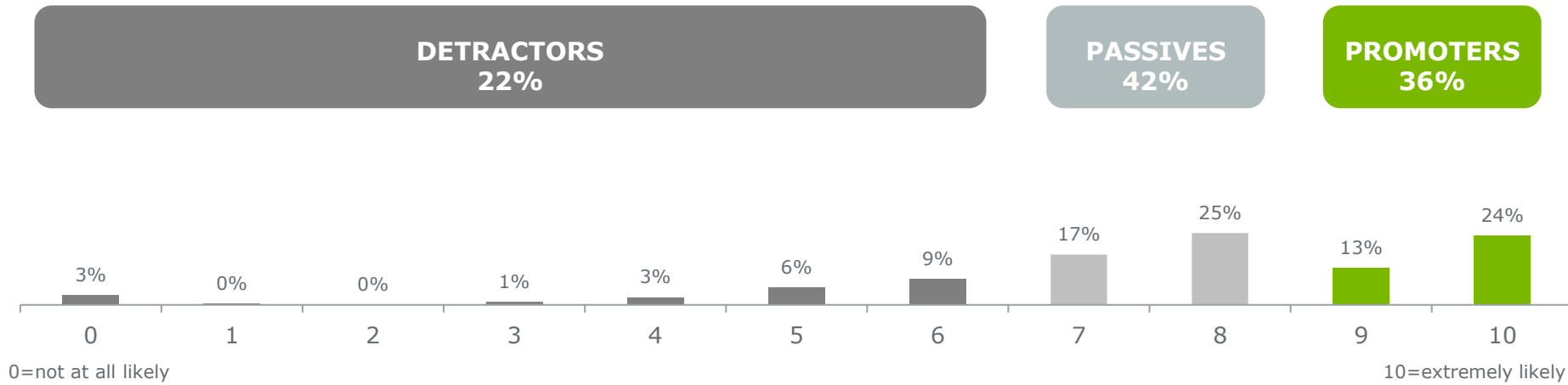


HA-non-owner, n=823



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%

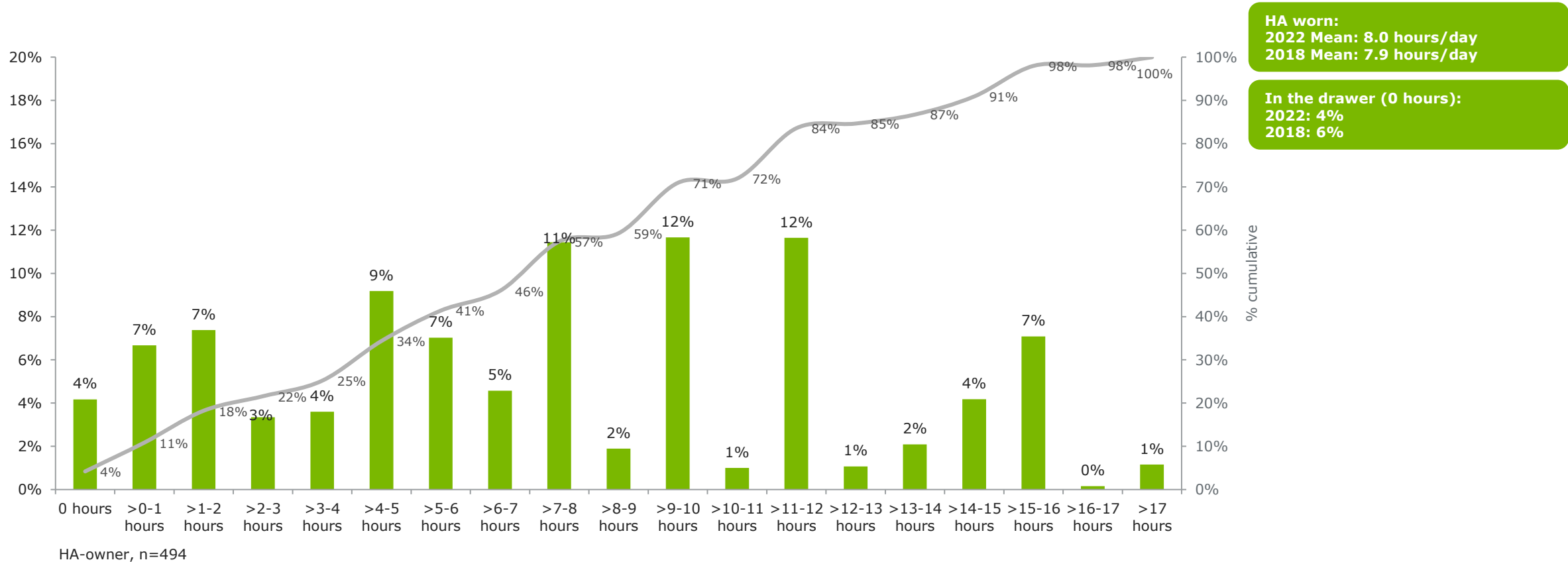
NPS = PROMOTERS – DETRACTORS = 15 (exact figure rounded)

HA-owner, n=494



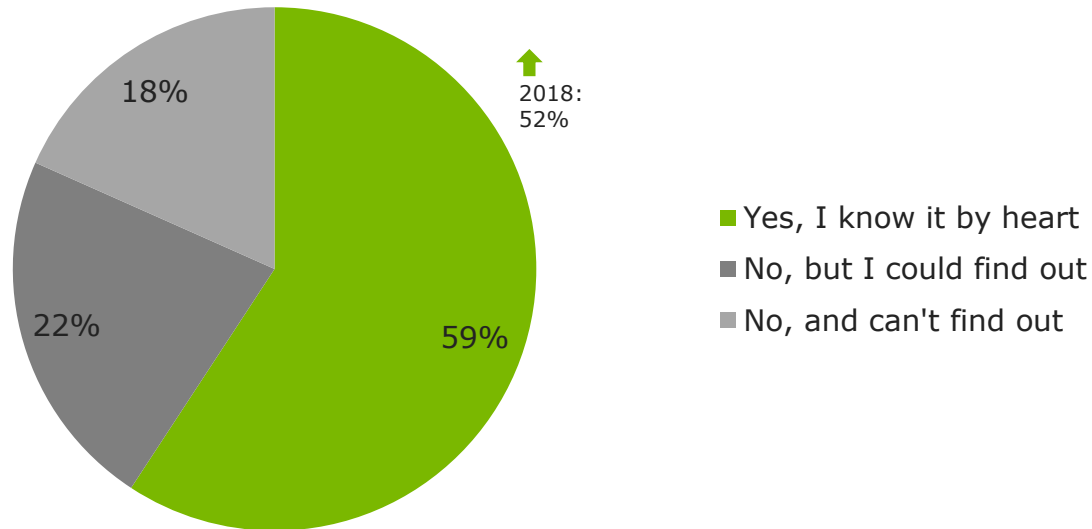
On average, HAs are worn 8 hours a day

How many hours a day are HA worn?



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)?



HA-owner, n=494

26% of the HA owners use a hearing aid app, 74% of those are satisfied with it.

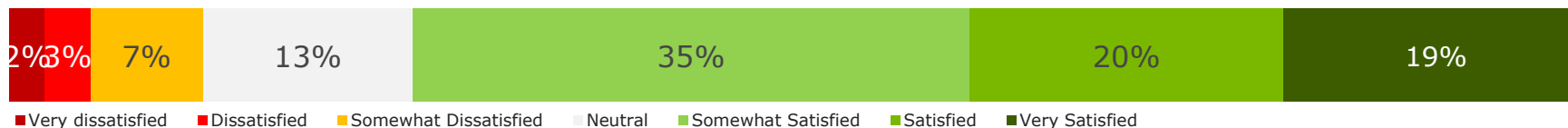
Have you been informed by your hearing care professional about hearing aid apps?
(HA owners, n=494)



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

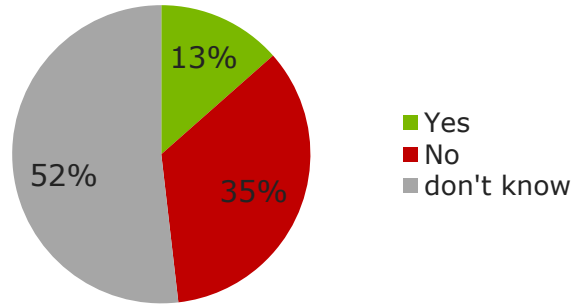


IF APPS USED (n=165):
Overall, how satisfied with the performance of your apps?



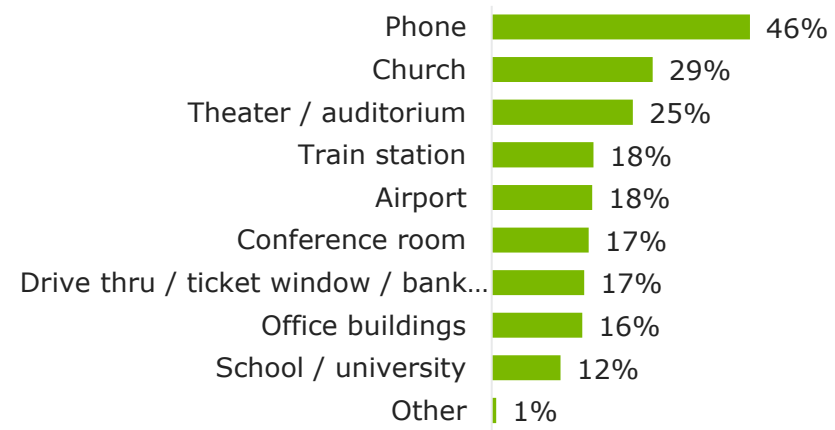
13% of the HAs are (to the knowledge of the owners) equipped with Telecoil. The primary usage of Telecoil is with the phone, in a church, and a theatre /auditorium.

Are your hearing aids equipped with Telecoil?



HA-owner, n=494

Where do you use your telecoil to improve your hearing?



HA-owner (use Telecoil), n=84

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



■ Never ■ Rarely ■ Occasionally ■ Often ■ Very often

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

How satisfied are you with the telecoil option?

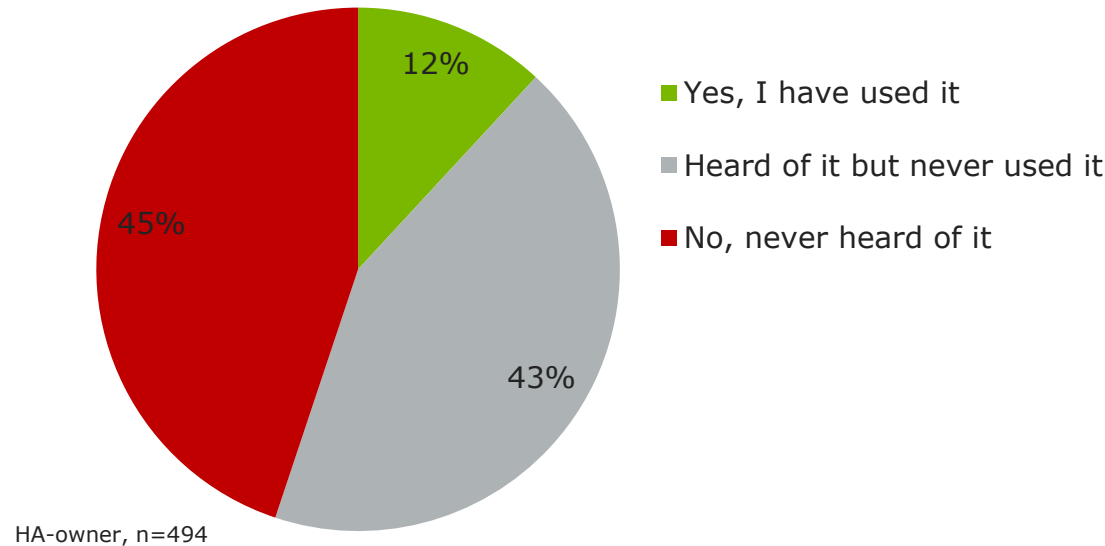


■ Very dissatisfied ■ Dissatisfied ■ Somewhat Dissatisfied ■ Neutral ■ Somewhat Satisfied ■ Satisfied ■ Very Satisfied

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

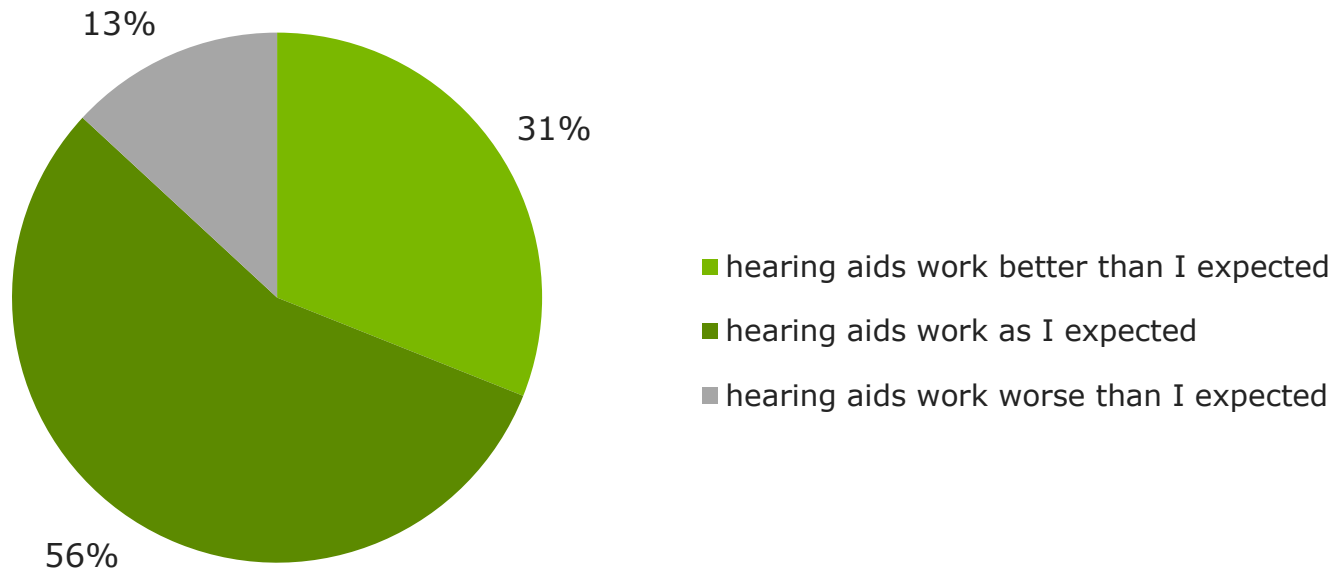
Have you ever heard of Remote fitting for your hearing aids? (Remote fitting: enables your hearing care professional to fit and fine-tune hearing aids from a distance (in real-time via video chat via an app), so that you don't need to leave your house to get your hearing aids adjusted)



Satisfaction with hearing aids and drivers

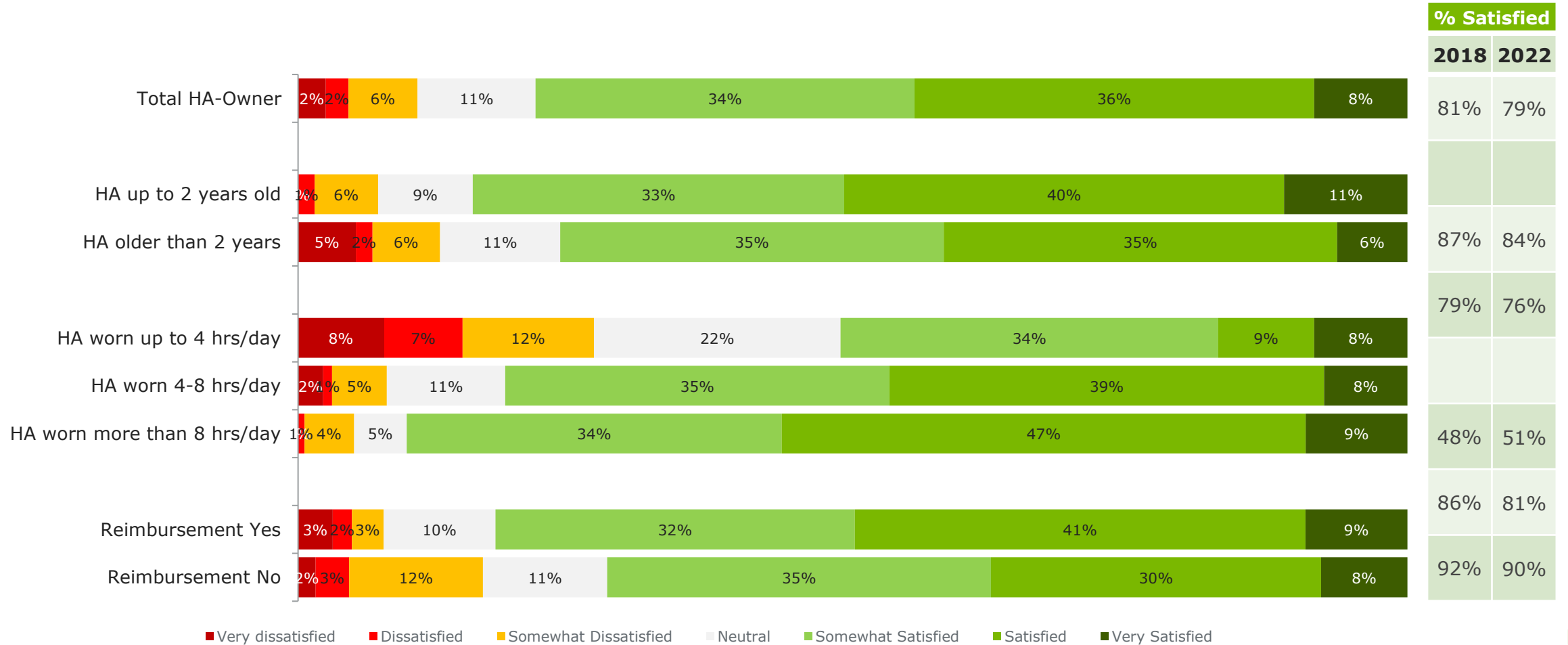
87% of the hearing aid owners say their hearing aid works better than or as expected

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

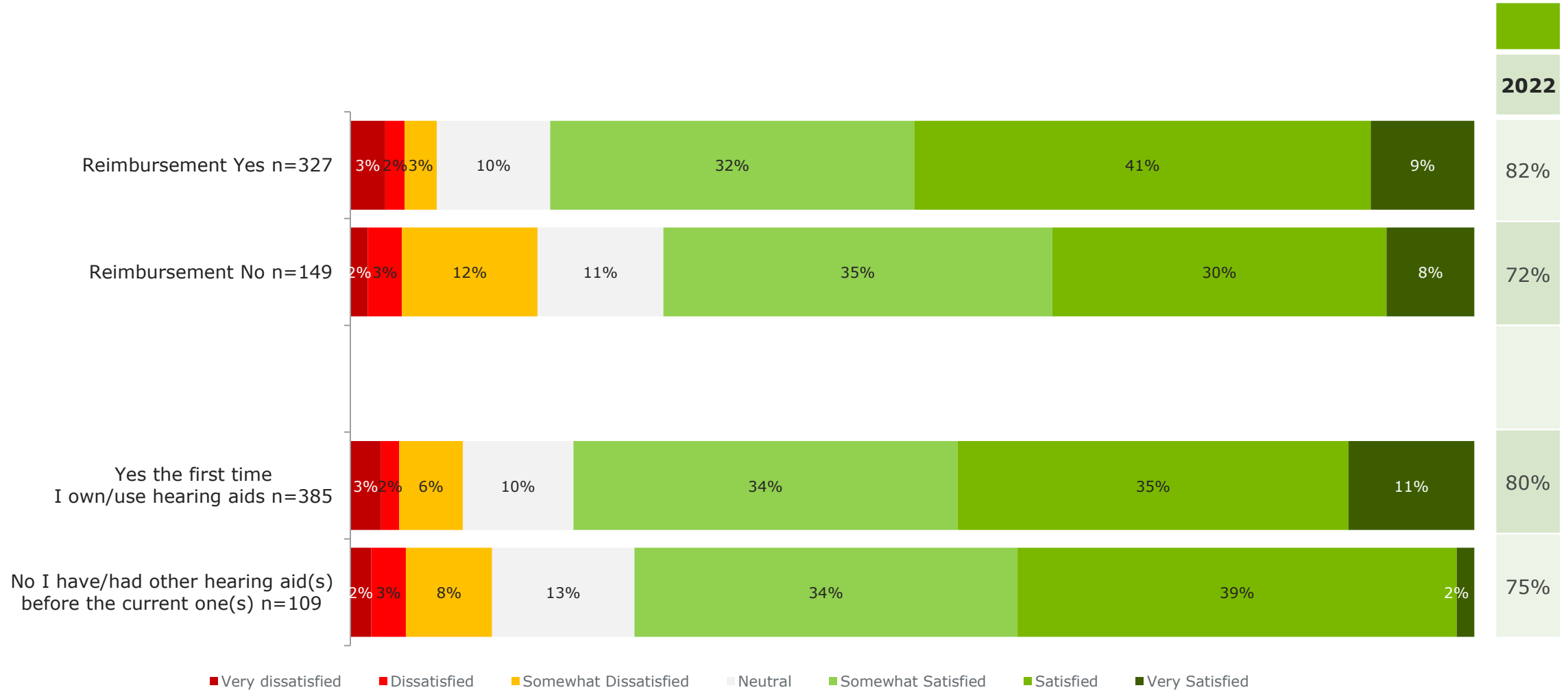


n=494

Overall satisfaction with HA: 79% of hearing aid owners are satisfied with their hearing aid(s)



Overall satisfaction: Additional analysis

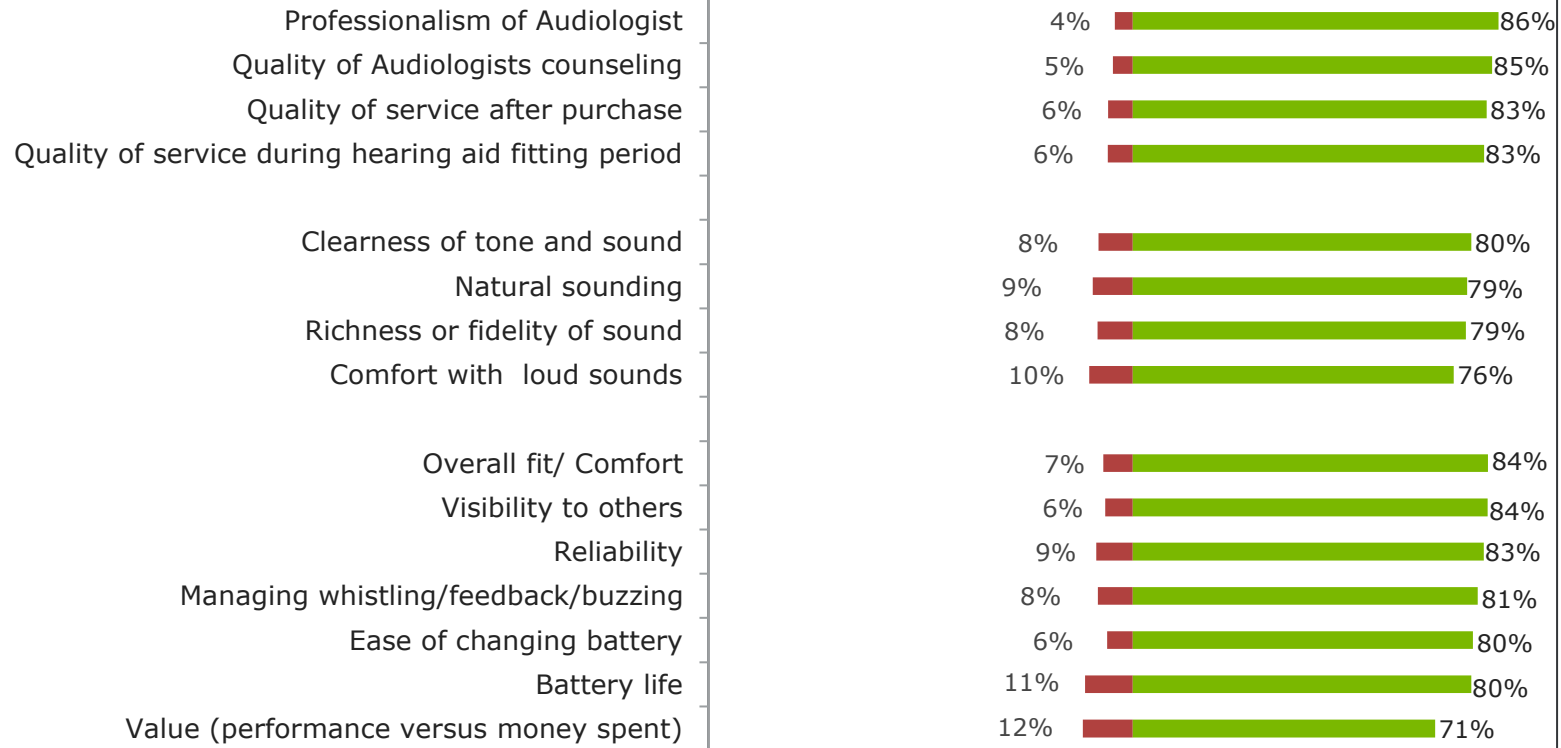


Satisfaction with current hearing aids

HA dispenser / Audiologist

Sound quality signal process.

Product features



Trend*
+/-0%
+/-0%
-1%
-3%
-3%
-4%
-3%
-4%
-1%
-1%
-4%
+/-0%
-7%
-3%
-3%

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

■ dissatisfied ■ satisfied

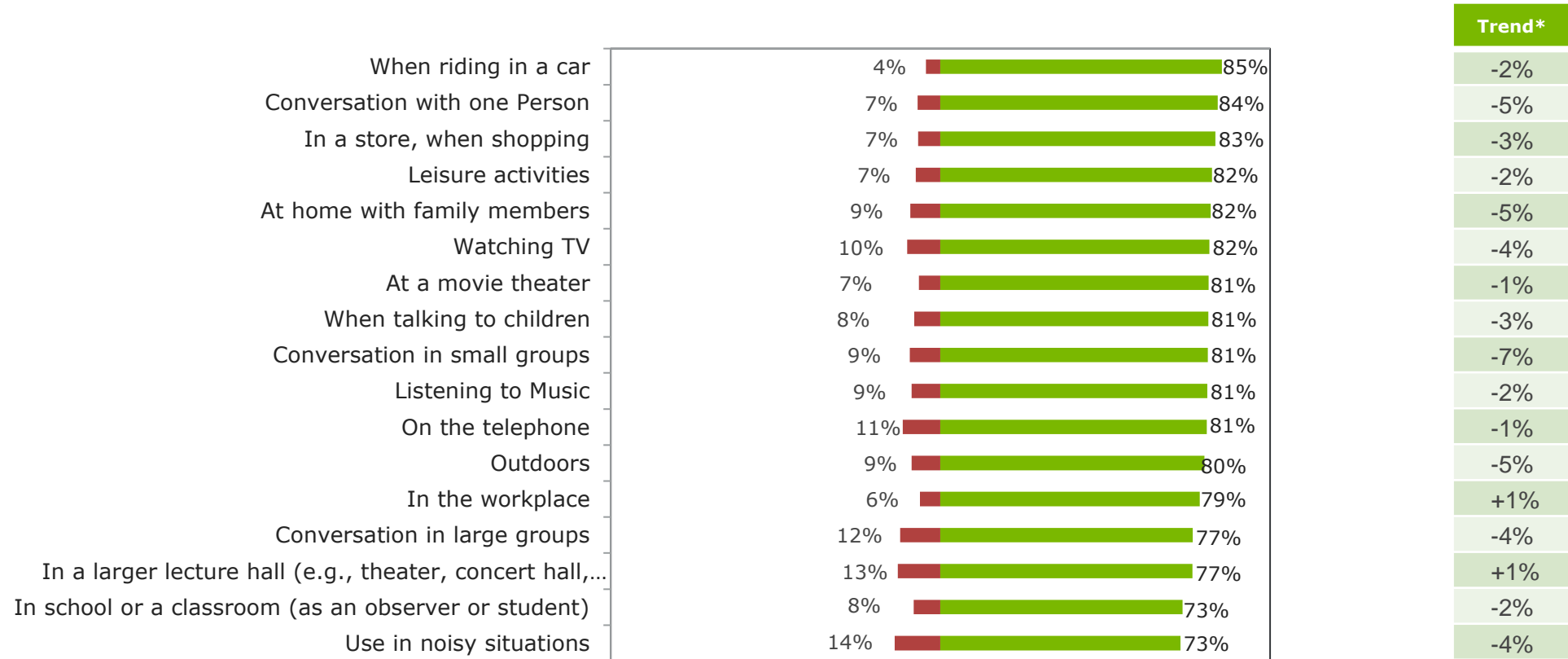
*% of satisfied HA owners compared to 2018

HA-owner, n=494



Satisfaction with current hearing aids

Listening situations



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

■ dissatisfied ■ 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

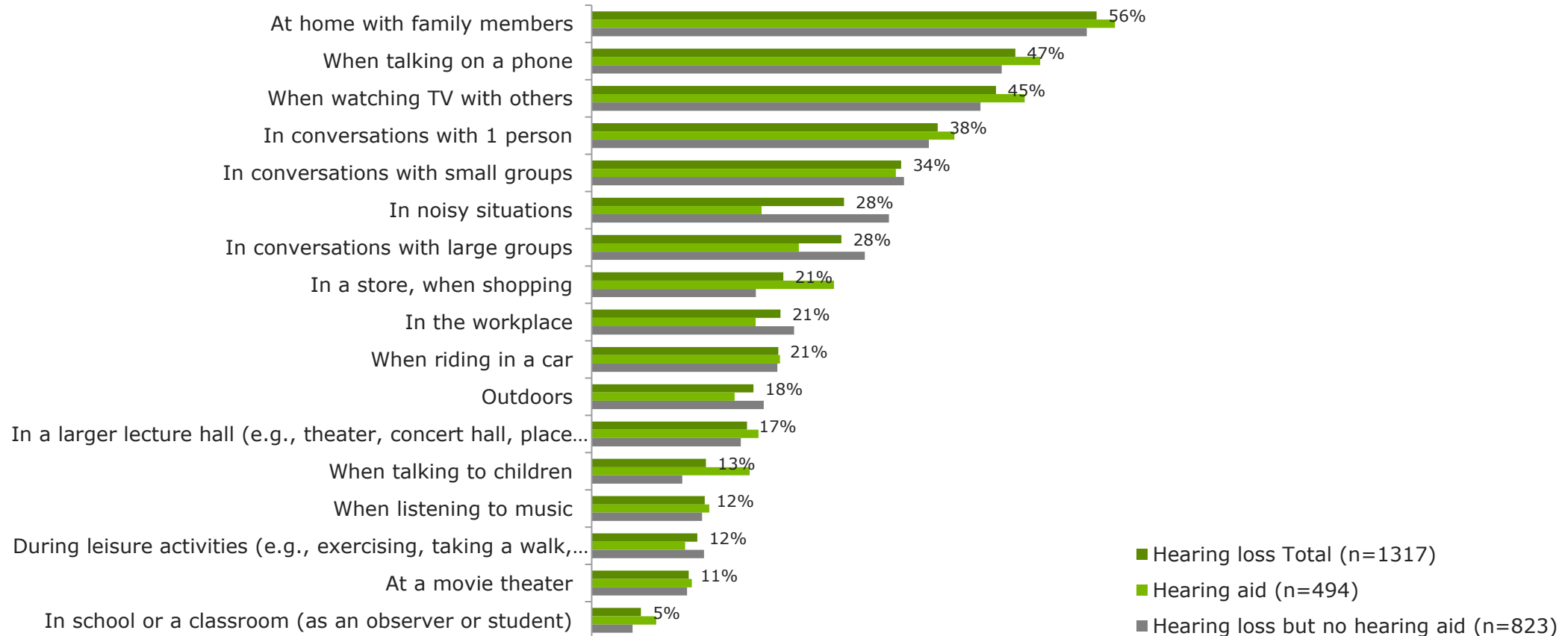
Influence on overall satisfaction with HA*

Category	Factor	Influence Score
HA dispenser / Audiologist	Quality of service after purchase	0.63
	Quality of Audiologists counseling	0.63
	Quality of service during hearing aid fitting period	0.63
	Professionalism of Audiologist	0.60
Sound quality signal processing	Richness or fidelity of sound	0.78
	Comfort with loud sounds	0.77
	Clearness of tone and sound	0.77
	Natural sounding	0.74
Product features	Reliability	0.77
	Managing whistling/feedback/buzzing	0.74
	Overall fit/ Comfort	0.68
	Visibility to others	0.67
	Battery life	0.65
	Value (performance versus money spent)	0.65
	Ease of changing battery	0.60

*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

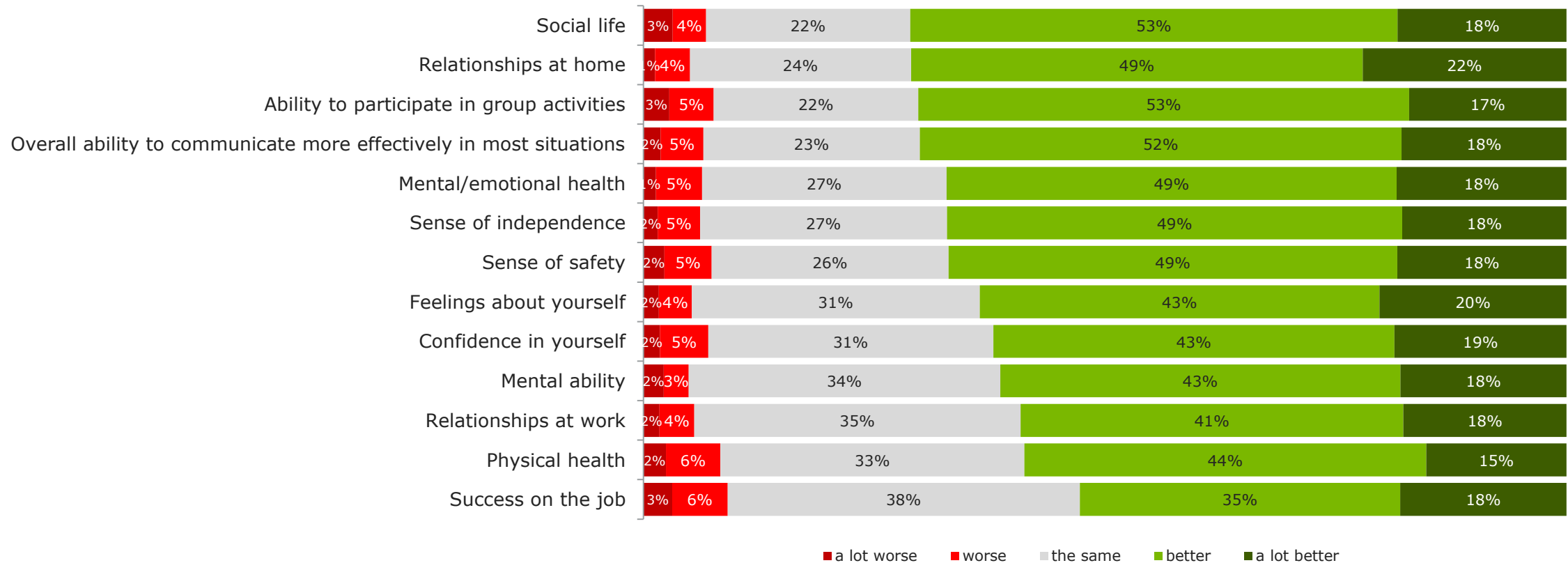
In which of these situations is it most important for you to hear well?
(choose up to 5)



Positive impact of hearing aids, quality of life

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

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).

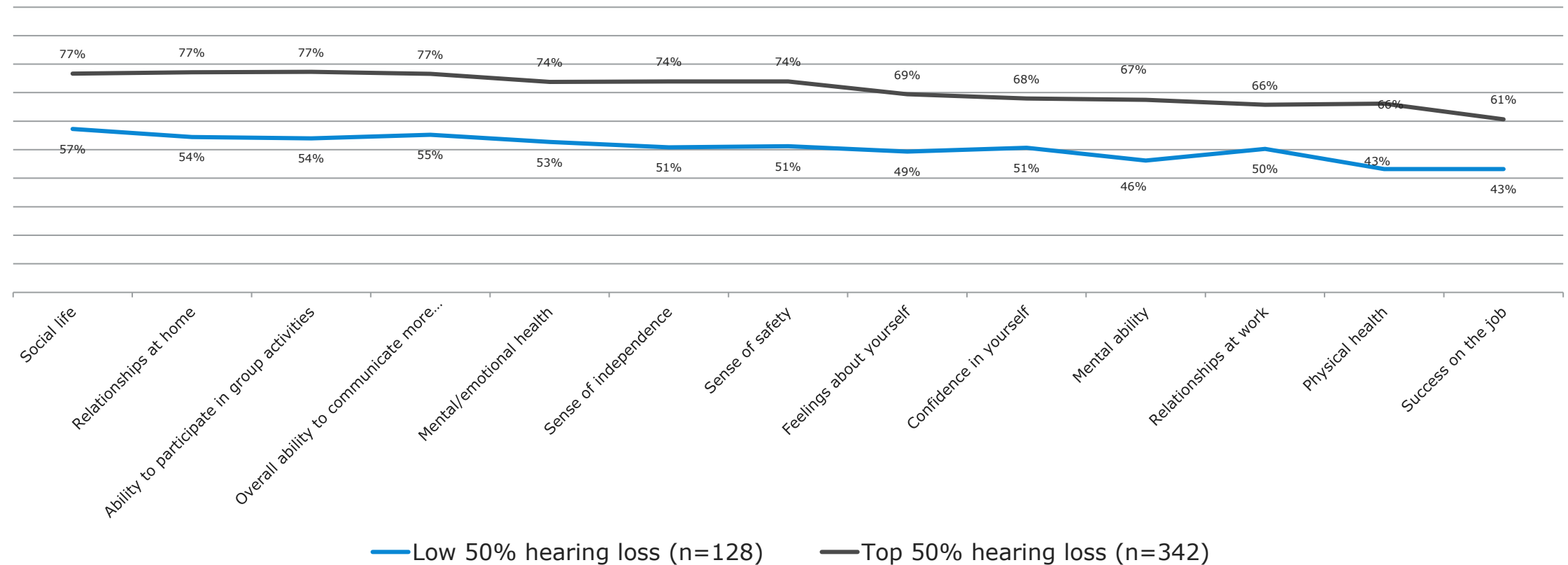


HA-owner, n=494



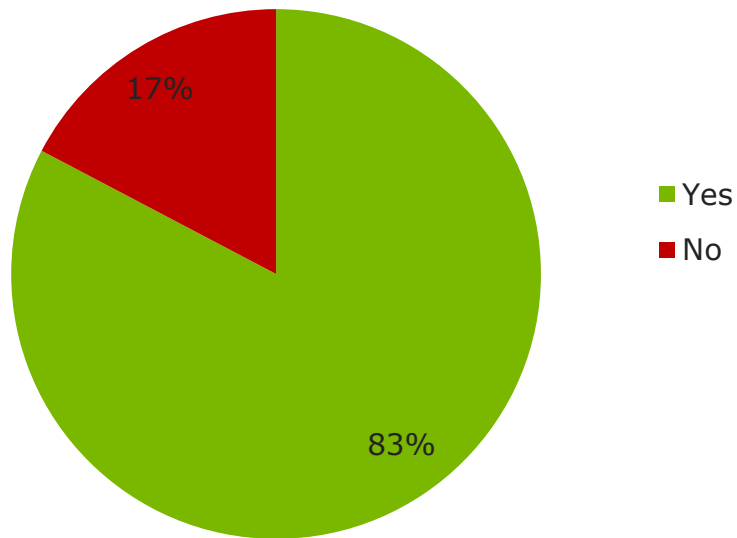
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

% of HA owners feeling better/a lot better



83% of the hearing aid owners feel more confident moving in a city since wearing hearing aids.

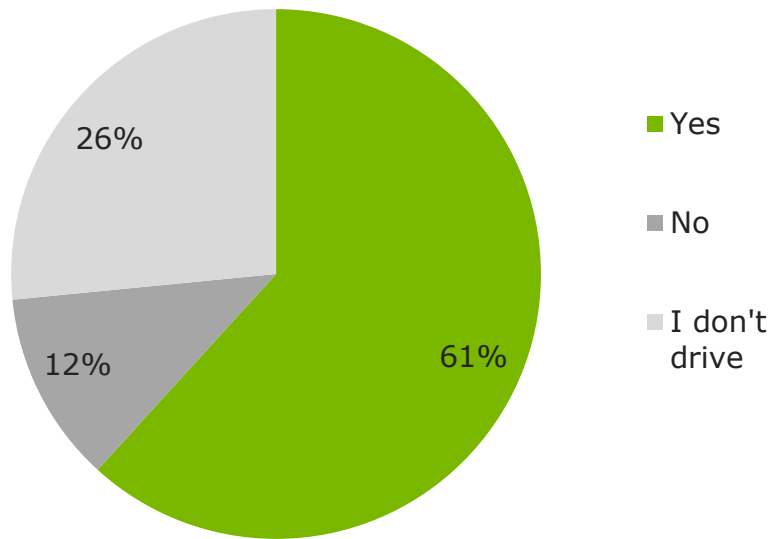
Since wearing a hearing aid, do you feel more confident moving in a city, e.g. because you hear traffic signals/vehicles approaching?



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?

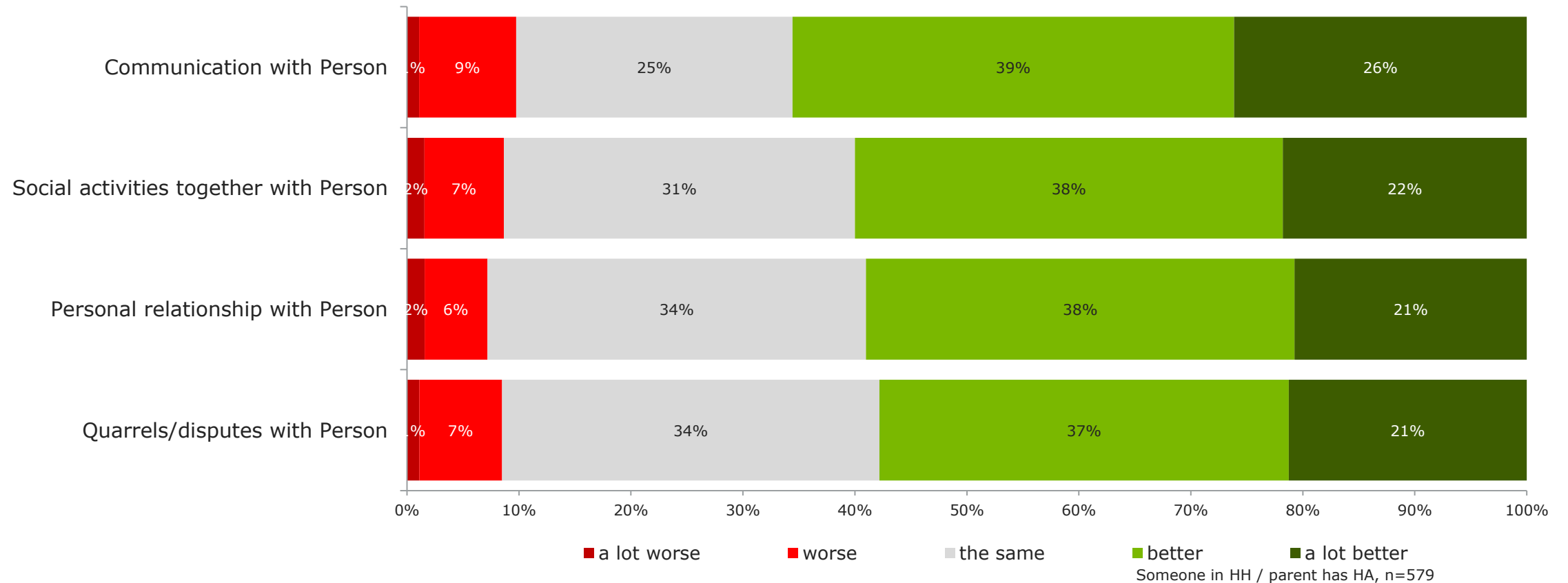


n=494



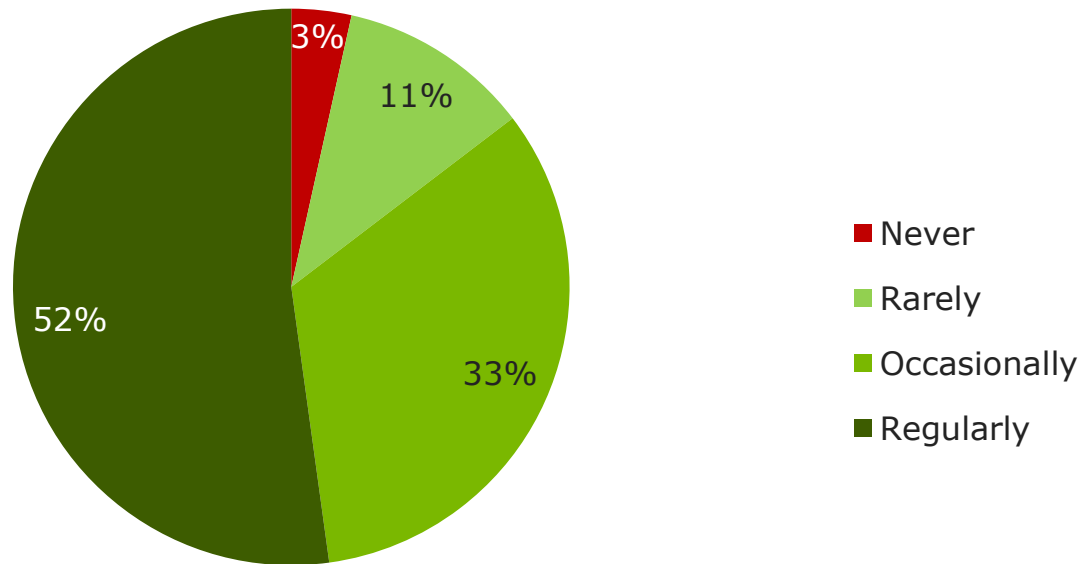
Also for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids

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



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?



n=494

4. Analysis of hearing impaired non-owners

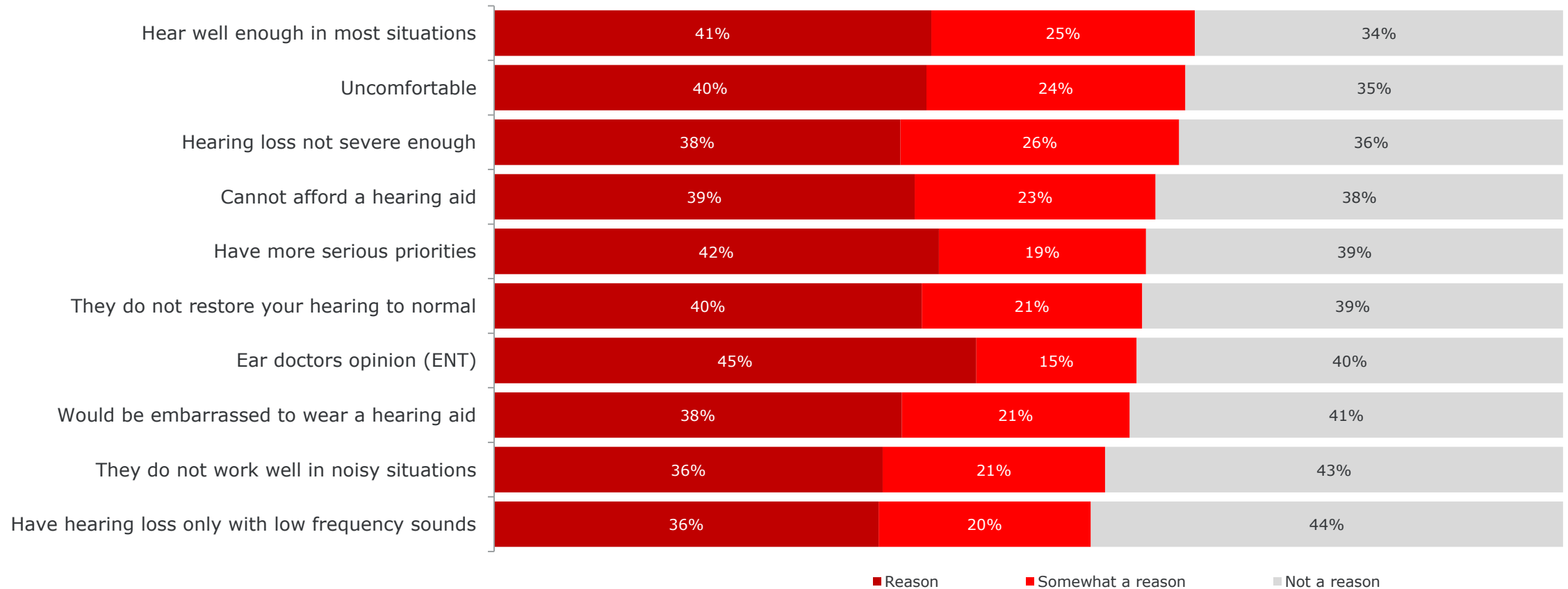
To analyse reasons of non-adoption we look at the Top 50% HL group, as the structure of hearing loss is more similar to that of HA owners

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
Ears impaired (stated)			
Unilateral loss	29%	48%	36%
Bilateral loss	71%	52%	64%
Perceived loss			
Mild	8%	49%	7%
Moderate	45%	46%	61%
Severe	42%	4%	27%
Profound	6%	1%	5%

← More similar hearing loss-structure →

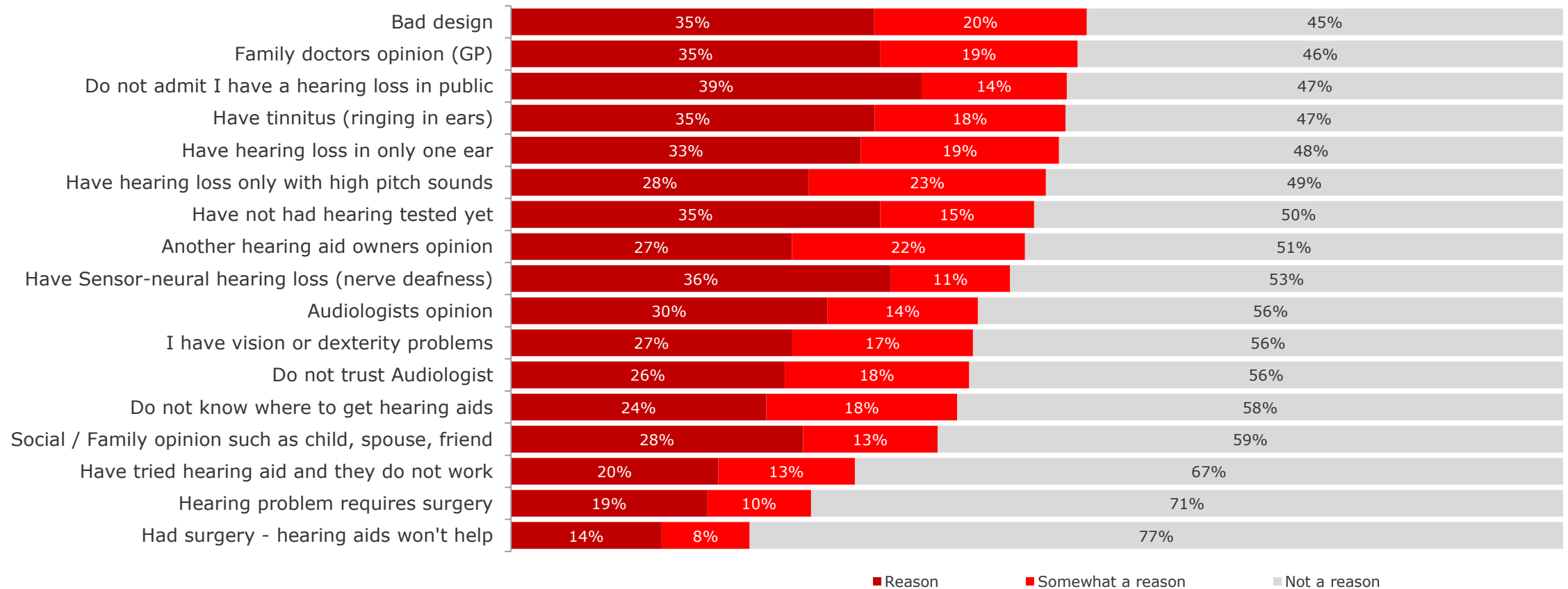
Top 10 reasons for not having a hearing aid (I/II)



Base: non owners Top 50% HL: n=218



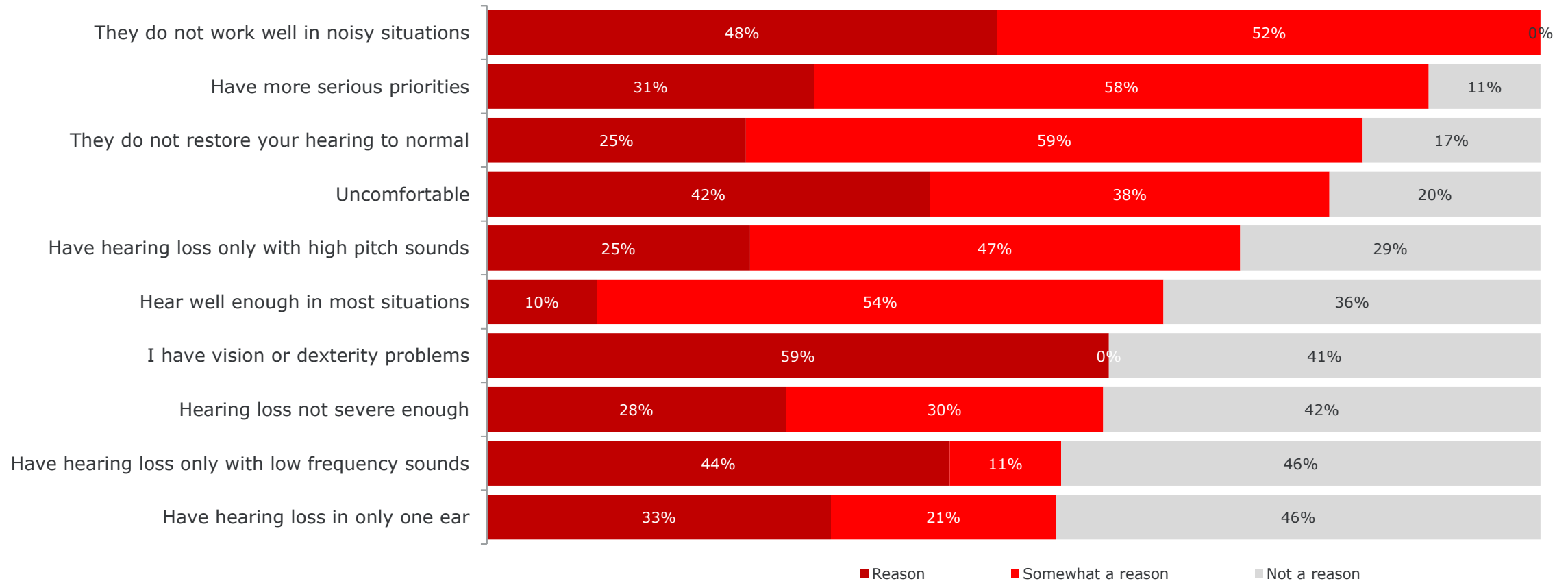
Less important reasons for not having a hearing aid (II/II)



Base: non owners Top 50% HL: n=218



Top 10 reasons for HA owners NOT using them



Owners who don't use, n=19 (low sample!)

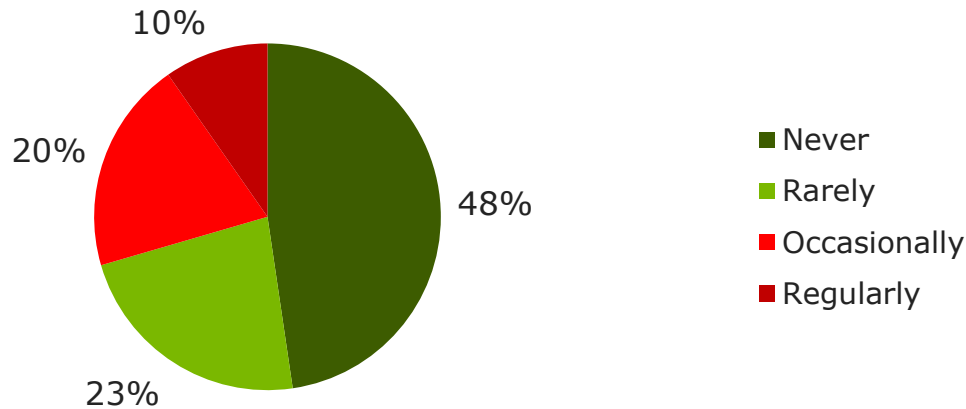


Social rejection because of hearing loss compared to the acceptance of hearing aids

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:

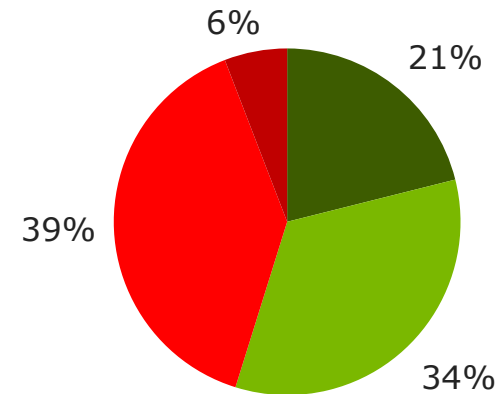
How often do you feel you are made fun of or rejected because you are wearing a hearing aid?



n=494

Hearing impaired non-owners:

How often do you feel you are made fun of or rejected because your hearing loss?



Base: Top 50% hearing loss, no hearing aid n=218

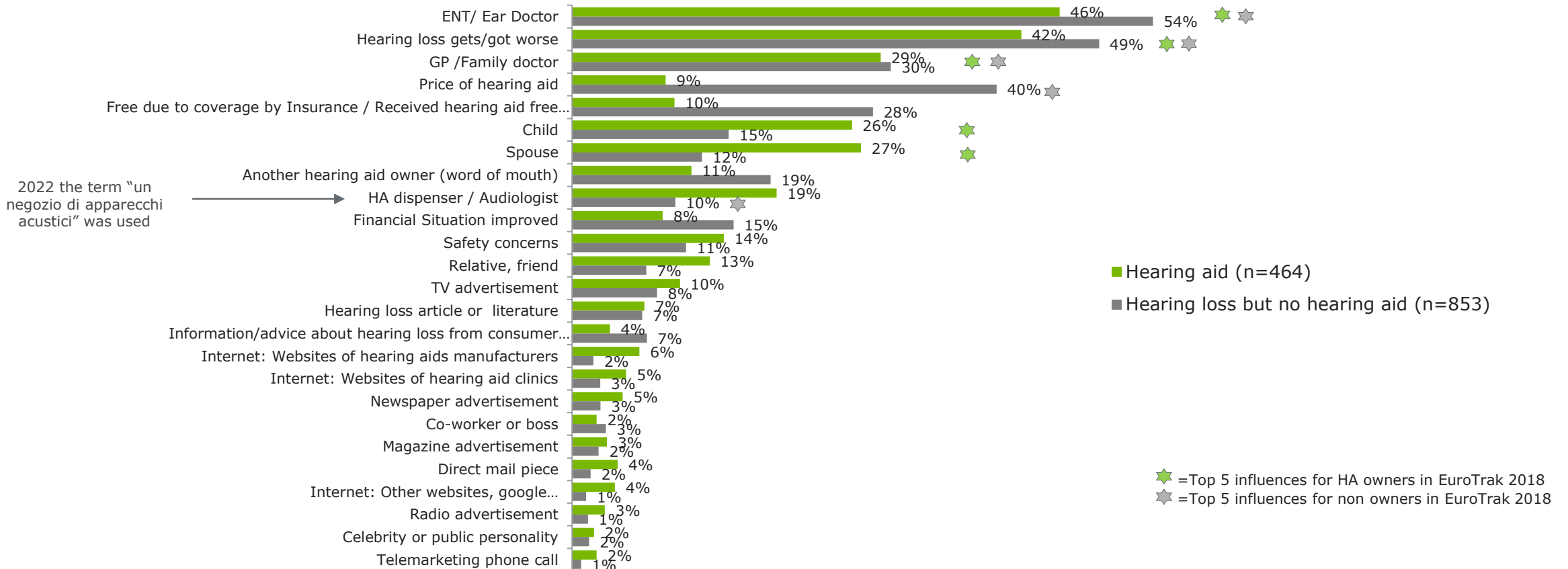


Most important triggers to buy

The most important influencing factors for getting hearing aids are worsening hearing loss, GP, ENT, audiologists and spouse (+price for the non owners).

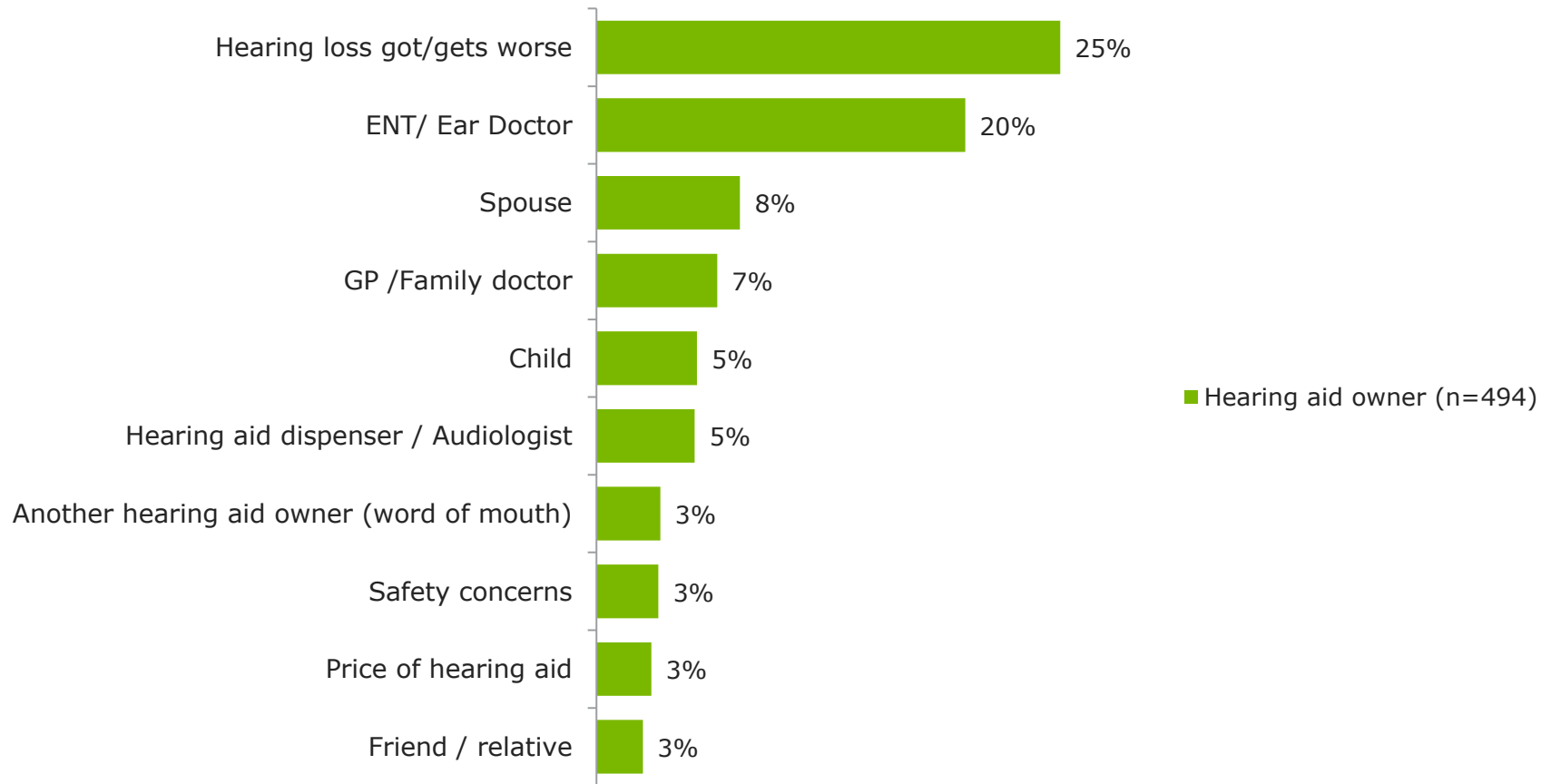
Owner: Thinking back to when you obtained your first hearing aid(s), what influenced you to obtain /purchase the hearing aid(s)?

Non-owner: What do you think would influence you to obtain / purchase a hearing aid ?



The most important trigger to buy a hearing aid is worsening hearing loss, followed by ENT, Audiologist and spouse.

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






Stefan Ruf lic. rer. pol.

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Demographics (1) Hearing instrument adoption rates and populations

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=Hearing impaired)	No hearing loss	Hearing loss but no hearing aids	Hearing aids
Gender						
Male	7'343	13.3%	35.1%	47.9%	51.1%	50.9%
Female	7'867	11.9%	35.2%	52.1%	48.9%	49.1%
Age						
1 - 14	1'872	2.2%	62.4%	13.8%	1.3%	3.8%
15 - 24	1'474	2.4%	48.7%	10.8%	1.5%	2.6%
25 - 34	1'643	3.7%	44.6%	11.9%	2.7%	4.1%
35 - 44	1'966	6.6%	42.9%	13.8%	6.0%	8.3%
45 - 54	2'477	10.7%	22.9%	16.6%	16.5%	9.1%
55 - 64	2'275	13.6%	27.6%	14.8%	18.2%	12.8%
65 - 74	1'730	22.4%	30.8%	10.1%	21.7%	17.8%
74+	1'774	38.3%	41.2%	8.2%	32.3%	41.7%
Type of household						
single household	1'084	23.2%	36.7%	6.3%	12.9%	13.8%
Couple, no kids	2'424	14.7%	33.8%	15.5%	19.1%	18.0%
Couple with kid(s)	9'251	10.2%	36.0%	62.5%	48.6%	50.5%
Single mom/dad with kid(s)	915	11.0%	31.1%	6.1%	5.6%	4.6%
Retirement home, hospital etc.	91	39.8%	38.5%	0.4%	1.8%	2.1%
Other	1'444	15.5%	33.0%	9.2%	12.1%	11.0%

Demographics (2) Hearing instrument adoption rates and populations

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=Hearing impaired)	No hearing loss	Hearingloss but no hearing aids	Hearing aids
Status						
The head of the household (alone or together with someone)	6'322	19.3%	35.0%	38.4%	63.9%	63.6%
The spouse of the head of the household	3'724	12.5%	33.2%	24.5%	25.1%	23.0%
Daughter/son of head of household	4'504	2.5%	35.8%	33.0%	5.9%	6.1%
Other person	660	17.0%	43.8%	4.1%	5.1%	7.3%
Employment						
Full time employed	5'146	9.8%	30.6%	40.9%	28.5%	23.9%
Part time employed	1'271	7.5%	28.0%	10.4%	5.6%	4.1%
Unemployed / not working	2'032	8.5%	28.2%	16.4%	10.2%	7.6%
Retired under a disability pension scheme (fully or partly)	378	28.8%	48.9%	2.4%	4.6%	8.3%
Early retired under an early retirement benefit scheme	399	22.8%	38.2%	2.7%	4.6%	5.4%
Retired (at the official retirement age)	2'798	31.0%	36.3%	17.0%	45.3%	48.9%
Student / pupil / in training	1'184	2.2%	42.4%	10.2%	1.3%	1.8%
Education						
Scuola elementare	942	33.6%	34.9%	5.5%	16.8%	17.2%
Scuola media inferiore	2'194	17.8%	31.3%	15.9%	22.0%	19.0%
Scuola media superiore	5'279	12.1%	30.9%	40.9%	36.3%	30.8%
Formazione professionale	1'092	16.7%	44.5%	8.0%	8.3%	12.6%
Università	3'601	9.2%	39.1%	28.8%	16.6%	20.1%
Other	99	2.5%	67.2%	0.9%	0.1%	0.3%

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)

Sample size	Random sample error	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
	Real value is within interval:	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
50	± 13.9	± 9.9
100	± 9.8	± 7.0
250	± 6.2	± 4.4
500	± 4.4	± 3.1
1'000	± 3.1	± 2.2
5'000	± 1.4	± 1.0
10'000	± 1.0	± 0.7