Results

EuroTrak UK 2022

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

EuroTrak UK 2022 is part of the EuroTrak / APACTrak studies:

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

Sample sizes:
Representative sample (sample 1): n=15'479 people
Hearing impaired (sample 2):
   HA owners: n= 703 people
   Hearing impaired non-owners: n= 617 people
Summary
2. Market overview

- Stated hearing loss prevalence
  - Total: 8.8%, 18+: 10.4% (2018: 9.7%, 18+: 11.6%).
  - Hearing Tests: 29% (2018: 34%) had a hearing test in the last 5 years, most tests done by ENTs.

- Hearing aid adoption rate (HA penetration)
  - 52.8% of those with self declared HL (2018: 47.6%).
  - 4.7% of total population (2018: 4.6%).
  - 62% of HA owners have binaural treatment (2018: 61%).

- The route to the hearing aid
  - 70% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 58% got hearing aids recommended from the ENT or family doctor (drop out rate=30% / 2018: 28%).
  - 51% of the GP consultations referred to an ENT, 43% to an Audiologist, 20% to get hearing aids. 9% recommended no action.
  - 42% of ENT consultations referred to an Audiologist, 52% recommended to get a hearing aid, 18% 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
  - 71% received NHS hearing devices.
  - 61% of the currently owned HAs were bought in 2019 or later.
  - The average age of the currently owned HAs is 2.9 years.
  - The median age of hearing aids before replacement is 4 years.
  - On average, HAs are worn 8.1 hours a day.
  - RIC is the most often purchased type of HA.
  - Cochlear Implants: <2% of HA owners have a CI. 30% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
  - 22% of the HA owners use a hearing aids app, 65% of those are satisfied with it.
  - 15% of the HAs are (to the knowledge of the owners) equipped with Telecoil. Main usage of Telecoil with phone, conference rooms, theaters and in office buildings.

- Importance of listening situations and satisfaction with HAs
  - 85% of the hearing aid owners say their hearing aid works better than or as expected.
  - 75% of the HA owners are satisfied with their HAs (2018: 74%).
  - 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 in noisy situations are the most important listening situations.

- Positive impact of HAs
  - Significant positive impact of HAs on different aspects: Especially Communication effectiveness, social life, ability to participate in group activities and self confidence improve with hearing aids.
  - 95% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
  - 67% 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 29% of the hearing impaired without hearing aids think that a third party would pay any part of hearing aids.
  - The main reasons for not using hearing aids are that they are thought to be uncomfortable, the hearing loss is not severe enough and people think to hear enough.
  - 8% who own hearing aids don’t use them at all (0 hours); 18% use them less than one hour/day (0-1 hour).

- Social rejection and triggers to buy
  - 64% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid. (only 25% say they are never made fun of because of their hearing loss).
  - The most important influencing factors for getting hearing aids are worsening hearing loss, ENT, audiologists, spouse and GPs (+price for the non owners).
Detailed Results: Roadmap

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

**Organisation**
- Principal of the project EuroTrak UK 2022 is EHIMA.
- Anovum Zurich developed the concept of EuroTrak UK, 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**
- EHIMA may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.
- The raw dataset remains at Anovum. If the principal uses the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:
  
  "Source: Anovum – EuroTrak UK/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=15'479 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=703 hearing aid owners and n=617 hearing impaired non-owners
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age

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<td>0.1%</td>
<td>2.0%</td>
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<td>15 - 24</td>
<td>0.1%</td>
<td>5.6%</td>
<td>5.7%</td>
<td>0.1%</td>
<td>2.0%</td>
<td>0.1%</td>
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<td>25 - 34</td>
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<td>6.7%</td>
<td>6.6%</td>
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<td>1.0%</td>
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<td>6.1%</td>
<td>5.9%</td>
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<td>1.0%</td>
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<td>45 - 54</td>
<td>0.2%</td>
<td>6.1%</td>
<td>6.0%</td>
<td>0.2%</td>
<td>1.0%</td>
<td>0.2%</td>
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<td>55 - 64</td>
<td>0.3%</td>
<td>5.7%</td>
<td>5.8%</td>
<td>0.3%</td>
<td>0.3%</td>
<td>0.3%</td>
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<td>65 - 74</td>
<td>0.5%</td>
<td>3.9%</td>
<td>4.4%</td>
<td>0.4%</td>
<td>0.4%</td>
<td>0.4%</td>
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<td>74+</td>
<td>0.8%</td>
<td>2.5%</td>
<td>3.6%</td>
<td>0.9%</td>
<td>0.5%</td>
<td>0.9%</td>
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</tbody>
</table>
Hearing loss prevalence UK
Self declared hearing loss

% hearing loss prevalence

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

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Hearing aid adoption rate: 53% of hearing impaired have hearing aid(s), 62% of them have binaural treatment.
Overview hearing loss prevalence and hearing aid adoption

- Hearing impaired (stated)
- Adoption (% of population)
- Adoption (% of stated impaired)
The more severe the hearing loss, the higher the adoption rate

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

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

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

<table>
<thead>
<tr>
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<th>HA-Non-owner</th>
<th>HA Owner</th>
<th>Hearing Aid Adoption (%)</th>
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<tr>
<td><strong>Ears impaired</strong></td>
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<tr>
<td>Unilateral loss</td>
<td>43%</td>
<td>25%</td>
<td>41%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>57%</td>
<td>75%</td>
<td>62%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>42%</td>
<td>17%</td>
<td>32%</td>
</tr>
<tr>
<td>Moderate</td>
<td>47%</td>
<td>57%</td>
<td>58%</td>
</tr>
<tr>
<td>Severe</td>
<td>9%</td>
<td>21%</td>
<td>71%*</td>
</tr>
<tr>
<td>Profound</td>
<td>2%</td>
<td>4%</td>
<td></td>
</tr>
</tbody>
</table>

*combined “severe” and “profound” because n is too small
Hearing tests and where hearing is tested
Hearing Tests: 29% had a hearing test in the last 5 years (2018: 34%), most tests done by ENTs

Have you ever taken a hearing test?
- Yes, in the last 12 months: 11%
- Yes, in the last 1-5 years: 18%
- Yes, more than 5 years ago: 20%
- No, never: 51%

Where/how was your hearing tested?
- Audiologist: 37%
- Family doctor: 31%
- Ear doctor (ENT): 29%
- Online test, smartphone app: 4%
- Other: 7%
- DNK: 4%

Base=12'161
Base= 3'601
The route to the hearing aid:
Sources of information and drop-out rates
Doctors/HCPs are the most important sources of information and therefore the major gatekeepers.

Where did you gather information about hearing aids?

- Family doctor, ear doctor (ENT), Audiologist: 42% (60%)
- Internet research combined: 27% (26%)
- Conversations with friends, relatives already fitted with a hearing aid: 16% (15%)
- Internet research: other websites, google…: 13% (11%)
- Internet research: websites of hearing aids manufacturers: 13% (12%)
- Internet research: websites of hearing aid clinics: 13% (12%)
- Articles in magazines or newspapers: 6% (6%)
- Print ads received in your mailbox: 4% (4%)
- Other: 2% (1%)
- I did not gather information about hearing aids: 15% (31%)

- Hearing loss Total (n=1'320)
- Hearing aid n=(617)
- Hearing loss but no hearing aid (n=703)
Of those who discussed the hearing loss with a doctor, 62% talked to a family doctor (GP) first and 38% 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)?

- Total n= 862
  - 62% Your family doctor
  - 38% Ear doctor (ENT specialist)

Hearing aid (n=554)
- 63% Your family doctor
- 37% Ear doctor (ENT specialist)

Hearing loss but no hearing aid (n=308)
- 61% Your family doctor
- 39% Ear doctor (ENT specialist)
The route to the hearing aid

- All hearing impaired: 100% (Drop out: 30% 2018: 28%)
- Discussed hearing loss with ear doctor or family doctor: 70% (Drop out: 17% 2018: 19%)
- Positive medical advice (Ear doctor or family doctor recommend further action): 58%
- Discussed hearing loss with audiologist: 60%
- Positive advice audiologist: 52%
- Bought hearing aid: 53%

n=1'320
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=1’320
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>Category</th>
<th>2022 n=1'320</th>
<th>2018 n=1'300</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total hearing impaired</td>
<td>57%</td>
<td>60%</td>
</tr>
<tr>
<td>HA owner</td>
<td>70%</td>
<td>78%</td>
</tr>
<tr>
<td>Impaired non-owner</td>
<td>43%</td>
<td>43%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

**HA owner (n=483)**
- Referred to an ear doctor (ENT): 50%
- Referred to an Audiologist: 53%
- Recommended to get a hearing aid: 24%
- Recommended no further action: 1%

**Impaired non-owner (n=249)**
- Referred to an ear doctor (ENT): 54%
- Referred to an Audiologist: 24%
- Recommended to get a hearing aid: 13%
- Recommended no further action: 23%
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></th>
<th>Total hearing impaired</th>
<th>HA owner</th>
<th>Hearing impaired non-owners</th>
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<tbody>
<tr>
<td>2022 n=1'320</td>
<td>55%</td>
<td>69%</td>
<td>40%</td>
</tr>
<tr>
<td>2018 n=1'300</td>
<td>54%</td>
<td>67%</td>
<td>41%</td>
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</tbody>
</table>

What did he/she recommend?

<table>
<thead>
<tr>
<th>HA owner (n=453)</th>
<th>Impaired non-owner (n=239)</th>
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</thead>
<tbody>
<tr>
<td>Referred to an Audiologist</td>
<td></td>
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<tr>
<td>Did prescribe a hearing aid</td>
<td></td>
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<tr>
<td>Recommended no further action</td>
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The route to the hearing aid: Audiologist
Have you ever discussed your hearing problem with a HA dispenser / Audiologist?

% Discussed with Audiologist

- Total hearing impaired: 60% discussed in 2022, 55% in 2018
- HA owner: 88% discussed in 2022, 85% in 2018
- Hearing impaired non-owners: 29% discussed in 2022, 27% in 2018

What did he/she recommend?

- HA owner (n=600):
  - Recommended to get a hearing aid: 97%
  - Recommended not to get a hearing aid: 3%

- Impaired non-owner (n=173):
  - Recommended to get a hearing aid: 53%
  - Recommended not to get a hearing aid: 47%
Recommendations by profession

- GP: 51% referred to an ear doctor (ENT), 43% referred to an Audiologist, 9% recommended to get a hearing aid, 20% recommended no further action.
- ENT: 52% referred to an ear doctor (ENT), 42% referred to an Audiologist, 18% recommended to get a hearing aid, 15% recommended no further action.
- Audiologist: 87% recommended no further action.

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Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities
Work competitiveness: 90% 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: 9%
- Of some use: 47%
- Of significant use: 43%

n=134
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.

- Disagree strongly
- Rather disagree
- Neutral
- Rather agree
- Strongly agree

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<tr>
<th></th>
<th>Hearing aid</th>
<th>Hearing loss, no hearing aid</th>
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<tbody>
<tr>
<td>I think that people with an untreated hearing loss tend to be less promoted in their job</td>
<td>8% 9% 39% 27% 16%</td>
<td>19% 17% 41% 15% 8%</td>
</tr>
<tr>
<td>I think that people with an untreated hearing loss tend not to get the job they deserve</td>
<td>8% 12% 37% 23% 19%</td>
<td>17% 16% 39% 19% 8%</td>
</tr>
<tr>
<td>I think that people with an untreated hearing loss tend to be under salaried</td>
<td>9% 12% 41% 22% 16%</td>
<td>21% 15% 43% 13% 8%</td>
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Base: Hearing loss, no hearing aid n=443/ hearing aid n=433
General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*).

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

Probability of major depressive disorder
- Hearing aid
  - 5% very high
  - 44% medium
  - 51% very low
- Top 50% hearing loss, no hearing aid
  - 19% very high
  - 55% medium
  - 26% very low

Base: hearing aid n=489 / top 50% HL, no hearing aid =137

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

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

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

Are you generally satisfied with the quality of your sleep?

- **Top 50% hearing loss, no hearing aid**
  - No: 66%
  - Yes: 34%

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

Base: hearing aid n=489 / top 50% HL, no hearing aid =137
32% 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.

- Depression: 32%
- Sleeping disorder: 22%
- Dementia: 14%
- High blood pressure: 13%
- Poor eyesight: 10%
- Diabetes: 8%
- Back problems: 6%

Hearing loss is not linked to any of those health issues: 50%

Hearing impaired, n=1'320
3. Analysis of hearing aid owners
Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
Low adoption rates within mild hearing loss

<table>
<thead>
<tr>
<th>Stated hearing loss</th>
<th>(% of impaired population*)</th>
<th>Adoption rate %</th>
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<tbody>
<tr>
<td>Profound (3%)</td>
<td>1% 2%</td>
<td>71%*</td>
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<tr>
<td>Severe (16%)</td>
<td>4% 11%</td>
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<tr>
<td>Moderate (52%)</td>
<td>22% 30%</td>
<td>58%</td>
</tr>
<tr>
<td>Mild (29%)</td>
<td>20% 9%</td>
<td>32%</td>
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Sums can differ from 100% due to rounding
* combined “severe” and “profound” because n is too small

n=1'320

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61% 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: 52%
- Behind the ear hearing aid with a tube and earpiece: 31%
- In the ear hearing aid: 13%
- Cochlear Implant: 2%
- Other: 2%

**Age of currently owned HAs (Mean):**
- 2022: 2.9 years
- 2018: 2.3 years

**Year of purchase**

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<td>2022</td>
<td>26%</td>
<td>42%</td>
<td>61%</td>
<td>77%</td>
<td>84%</td>
<td>88%</td>
<td>93%</td>
<td>95%</td>
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<td>2018</td>
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41% of the population in UK have never heard of Cochlear Implants. 30% 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?

- 9% Yes, know it well
- 50% Yes, know it a little
- 9% No, never heard of it
- 31% don't know

n=4'144

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

- 30% Yes
- 65% No
- 4% don't know

n=167 (HA owners with severe/profound HL)
Hearing aids are used for 4 years before they are being replaced. On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids.

**Current HAs = first HAs?**
- Yes: 40%
- No: 60%

**HA non owners (1st HA):**
Thinking back before you acquired your first hearing aid: How many years have passed since you became aware of your hearing loss until you acquired a hearing aid?
- 1 year: 17%
- 2 years: 28%
- 3 years: 26%
- 4-6 years: 17%
- more than 6 years: 12%

**How many years did you own your previous HAs?**
- 41% 1-3 years
- 36% 4-6 years
- 14% 7-10 years
- 9% 11 years or longer

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

**HA non owners:**
How many years had passed since you became aware of your hearing loss?
- 14% 1 year
- 19% 2 years
- 17% 3 years
- 17% 4-6 years
- 34% more than 6 years

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66% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on social life.

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

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

- Better social life: 63%
- Better mental/emotional health: 38%
- Better performance at work: 31%
- Less fatigue in the evening: 17%
- Other opportunity: 8%

HA-owner, n=703
n=462
71% of the hearing aid owners received a free-of-charge NHS instrument. A majority of hearing impaired without hearing aids don’t know whether a third party would pay any part of hearing aids.

**Owners**: Did you purchase your most current hearing aid in the private sector or did you receive a free-of-charge NHS instrument?

- **27%** NHS (free of charge)
- **71%** Private sector
- **2%** I don’t know

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

- **43%** Yes
- **29%** No
- **28%** I don’t know

2018: 75% NHS

2018: 28% Private sector

HA-owner, n=703

HA-non-owners, n=617
NHS is the preferred place for obtaining hearing aids (both for owners and non owners).

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

- NHS hospital/clinic: 56%
- Optician: 16%
- Specialized hearing aid store: 16%
- Pharmacy: 7%
- Online: 4%

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

- NHS hospital/clinic: 59%
- Optician: 10%
- Specialized hearing aid store: 23%
- Pharmacy: 2%
- Online: 2%

NHS is the preferred place for obtaining hearing aids (both for owners and non owners).
Recommendation intention of the place where the hearing aid(s) have been obtained: Positive NPS score of 22.

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

NPS = PROMOTERS – DETRACTORS = 22

HA-owner, n=703
On average, HAs are worn 8.1 hours a day

How many hours a day are HA worn?

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33% 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)?

- 33% Yes, I know it by heart
- 30% No, but I could find out
- 37% No, and can't find out

HA-owner, n=703
22% of the HA owners use a hearing aid app, 65% of those are satisfied with it.

Have you been informed by your hearing care professional about hearing aid apps? (HA owners, n=703)

- Yes: 29%
- No: 63%
- don’t know / no answer: 8%

Do you personally use apps for your hearing aids? (HA owners, n=703)

- Yes: 22%
- No: 78%

IF APPS USED (n=137):
Overall, how satisfied with the performance of your accessory(s)?

- very dissatisfied: 8%
- dissatisfied: 8%
- somewhat dissatisfied: 18%
- neutral: 12%
- somewhat satisfied: 30%
- satisfied: 23%
- very satisfied: 23%
15% of the HAs are (to the knowledge of the owners) equipped with Telecoil. Main usage of Telecoil with phone, in office buildings and conference rooms and in theaters.

Are your hearing aids equipped with Telecoil?

- Yes: 15%
- No: 58%
- don't know: 28%

<table>
<thead>
<tr>
<th>HA-owner, n=703</th>
</tr>
</thead>
<tbody>
<tr>
<td>15%</td>
</tr>
</tbody>
</table>

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

- never: 6%
- rarely: 17%
- occasionally: 31%
- often: 25%
- very often: 21%

<table>
<thead>
<tr>
<th>HA-owner (equipped with Telecoil), n=85</th>
</tr>
</thead>
<tbody>
<tr>
<td>6%</td>
</tr>
</tbody>
</table>

Where do you use your telecoil to improve your hearing?

- Phone: 43%
- Conference room: 29%
- Theater / auditorium: 28%
- Office buildings: 26%
- Church: 21%
- Airport: 18%
- Train station: 17%
- School / university: 16%
- Drive thru / ticket window / bank…: 16%
- Other: 3%

<table>
<thead>
<tr>
<th>HA-owner (use Telecoil), n=79</th>
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</thead>
<tbody>
<tr>
<td>43%</td>
</tr>
</tbody>
</table>

How satisfied are you with the telecoil option?

- very dissatisfied: 5%
- dissatisfied: 13%
- somewhat dissatisfied: 24%
- neutral: 31%
- satisfied: 24%

<table>
<thead>
<tr>
<th>HA-owner (use Telecoil), n=79</th>
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<tbody>
<tr>
<td>5%</td>
</tr>
</tbody>
</table>

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8% of the HA owners have already used remote fitting, 17% have at least heard of it, 74% 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
85% of the hearing aid owners say their hearing aid works better than or as expected

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

- 35% hearing aids work better than I expected
- 50% hearing aids work as I expected
- 15% hearing aids work worse than I expected

n=703
Overall satisfaction with HA: 75% of hearing aid owners are satisfied with their hearing aid(s)
Satisfaction with current hearing aids

**Professionalism of Audiologist**
- Dissatisfied: 5%
- Satisfied: 87%

**Quality of Audiologists counseling**
- Dissatisfied: 6%
- Satisfied: 82%

**Quality of service during hearing aid fitting period**
- Dissatisfied: 9%
- Satisfied: 81%

**Quality of service after purchase**
- Dissatisfied: 10%
- Satisfied: 80%

**Sound quality**
- Dissatisfied: 15%
- Satisfied: 74%

**Signal process**
- Dissatisfied: 14%
- Satisfied: 74%

**Comfort with loud sounds**
- Dissatisfied: 15%
- Satisfied: 71%

**Richness or fidelity of sound**
- Dissatisfied: 14%
- Satisfied: 69%

**Product features**
- **Ease of changing battery**
  - Dissatisfied: 7%
  - Satisfied: 83%

- **Reliability**
  - Dissatisfied: 9%
  - Satisfied: 80%

- **Battery life**
  - Dissatisfied: 13%
  - Satisfied: 77%

- **Overall fit/Comfort**
  - Dissatisfied: 13%
  - Satisfied: 75%

- **Value (performance versus money spent)**
  - Dissatisfied: 6%
  - Satisfied: 75%

- **Visibility to others**
  - Dissatisfied: 13%
  - Satisfied: 73%

- **Managing whistling/feedback/buzzing**
  - Dissatisfied: 15%
  - Satisfied: 72%

---

*% of satisfied HA owners compared to 2018

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### Satisfaction with current hearing aids

#### Listening situations

<table>
<thead>
<tr>
<th>Situation</th>
<th>%dissatisfied</th>
<th>%satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversation with one Person</td>
<td>22%</td>
<td>78%</td>
</tr>
<tr>
<td>At home with family members</td>
<td>18%</td>
<td>82%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>18%</td>
<td>82%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>12%</td>
<td>88%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>12%</td>
<td>88%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>14%</td>
<td>86%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>12%</td>
<td>88%</td>
</tr>
<tr>
<td>Listening to Music</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>13%</td>
<td>87%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>11%</td>
<td>89%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>17%</td>
<td>83%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>12%</td>
<td>88%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>18%</td>
<td>82%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>18%</td>
<td>82%</td>
</tr>
<tr>
<td>In a larger lecture hall (e.g., theater, concert hall,...)</td>
<td>18%</td>
<td>82%</td>
</tr>
</tbody>
</table>

#### Use in noisy situations

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

---

*Trend*:

- Conversation with one Person: -2%
- At home with family members: +1%
- Watching TV: -2%
- Outdoors: +2%
- In a store, when shopping: +2%
- When talking to children: +3%
- Conversation in small groups: -1%
- When riding in a car: +0%
- Listening to Music: -2%
- At a movie theater: +3%
- Leisure activities: -2%
- On the telephone: +0%
- In the workplace: +3%
- Conversation in large groups: +0%
- In school or a classroom (as an observer or student): -6%
- In a larger lecture hall (e.g., theater, concert hall,...): -5%

HA-owner, n=703

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Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA

<table>
<thead>
<tr>
<th>Audiologist</th>
<th>Influence on overall satisfaction with HA*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of service after purchase</td>
<td>0.61</td>
</tr>
<tr>
<td>Quality of service during hearing aid fitting period</td>
<td>0.58</td>
</tr>
<tr>
<td>Quality of Audiologists counseling</td>
<td>0.53</td>
</tr>
<tr>
<td>Professionalism of Audiologist</td>
<td>0.51</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sound quality signal process.</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Clearness of tone and sound</td>
<td>0.74</td>
</tr>
<tr>
<td>Natural sounding</td>
<td>0.73</td>
</tr>
<tr>
<td>Comfort with loud sounds</td>
<td>0.69</td>
</tr>
<tr>
<td>Richness or fidelity of sound</td>
<td>0.68</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product features</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliability</td>
<td>0.69</td>
</tr>
<tr>
<td>Overall fit/ Comfort</td>
<td>0.65</td>
</tr>
<tr>
<td>Managing whistling/feedback/buzzing</td>
<td>0.57</td>
</tr>
<tr>
<td>Visibility to others</td>
<td>0.54</td>
</tr>
<tr>
<td>Value (performance versus money spent)</td>
<td>0.52</td>
</tr>
<tr>
<td>Battery life</td>
<td>0.48</td>
</tr>
<tr>
<td>Ease of changing battery</td>
<td>0.46</td>
</tr>
</tbody>
</table>

*The Influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction, 1 means a maximal relationship. Read: Clearness of tone and sound is the most important criteria for satisfaction.
Important listening situations

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

- At home with family members: 51%
- When talking on a phone: 47%
- When watching TV with others: 44%
- In noisy situations: 38%
- In conversations with small groups: 35%
- In conversations with 1 person: 35%
- In conversations with large groups: 34%
- In a store, when shopping: 19%
- In the workplace: 18%
- When talking to children: 17%
- In a larger lecture hall (e.g., theater, concert hall, place...): 15%
- When listening to music: 15%
- When riding in a car: 14%
- During leisure activities (e.g., exercising, taking a walk,...): 12%
- Outdoors: 11%
- At a movie theater: 10%
- In school or a classroom (as an observer or student): 7%
Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially Communication effectiveness, social life, ability to participate in group activities self confidence and relationship at home improve with hearing aids.

Since you started using your hearing aid(s), please rate the changes you have experienced in each of the following areas, that you believe are due to your hearing aid(s).

Overall ability to communicate more effectively in most situations
- 6% a lot worse
- 29% worse
- 42% the same
- 21% better
- 6% a lot better

Ability to participate in group activities
- 5% a lot worse
- 29% worse
- 37% the same
- 17% better
- 9% a lot better

Social life
- 5% a lot worse
- 39% worse
- 34% the same
- 18% better
- 8% a lot better

Confidence in yourself
- 5% a lot worse
- 43% worse
- 31% the same
- 19% better
- 8% a lot better

Relationships at home
- 4% a lot worse
- 48% worse
- 26% the same
- 20% better
- 12% a lot better

Feelings about yourself
- 4% a lot worse
- 49% worse
- 30% the same
- 16% better
- 11% a lot better

Sense of safety
- 2% a lot worse
- 2% worse
- 27% the same
- 17% better
- 17% a lot better

Sense of independence
- 6% a lot worse
- 0% worse
- 27% the same
- 17% better
- 17% a lot better

Relationships at work
- 4% a lot worse
- 52% worse
- 24% the same
- 19% better
- 14% a lot better

Success on the job
- 5% a lot worse
- 52% worse
- 26% the same
- 16% better
- 16% a lot better

Mental/emotional health
- 8% a lot worse
- 58% worse
- 22% the same
- 15% better
- 15% a lot better

Mental ability
- 2% a lot worse
- 59% worse
- 23% the same
- 13% better
- 12% a lot better

Physical health
- 4% a lot worse
- 65% worse
- 18% the same
- 12% better
- 12% a lot better

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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
67% 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: 67%
- No: 33%

n=703
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: 5%
  - Worse: 13%
  - The same: 33%
  - Better: 30%
  - A lot better: 19%

- **Social activities together with Person**
  - A lot worse: 4%
  - Worse: 10%
  - The same: 53%
  - Better: 20%
  - A lot better: 13%

- **Personal relationship with Person**
  - A lot worse: 3%
  - Worse: 7%
  - The same: 60%
  - Better: 16%
  - A lot better: 14%

- **Quarrels/disputes with Person**
  - A lot worse: 4%
  - Worse: 8%
  - The same: 60%
  - Better: 18%
  - A lot better: 11%

Someone in HH / parent has HA, n=625
95% 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?

- 45% Regularly
- 35% Occasionally
- 15% Rarely
- 5% Never

n=703
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.

<table>
<thead>
<tr>
<th>Hearing loss characteristics: Owners compared to non-owners</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired (stated)</strong></td>
</tr>
<tr>
<td>Unilateral loss</td>
</tr>
<tr>
<td>Bilateral loss</td>
</tr>
<tr>
<td>More similar hearing loss-structure</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
</tr>
<tr>
<td>Mild</td>
</tr>
<tr>
<td>Moderate</td>
</tr>
<tr>
<td>Severe</td>
</tr>
<tr>
<td>Profound</td>
</tr>
</tbody>
</table>
Top 10 reasons for not having a hearing aid (I/II)

1. Uncomfortable: 49% Reason, 18% Somewhat a reason, 33% Not a reason
2. Hearing loss not severe enough: 45% Reason, 20% Somewhat a reason, 35% Not a reason
3. Hear well enough in most situations: 39% Reason, 25% Somewhat a reason, 36% Not a reason
4. They do not work well in noisy situations: 43% Reason, 18% Somewhat a reason, 39% Not a reason
5. Would be embarrassed to wear a hearing aid: 44% Reason, 14% Somewhat a reason, 41% Not a reason
6. Have more serious priorities: 47% Reason, 12% Somewhat a reason, 41% Not a reason
7. They do not restore your hearing to normal: 36% Reason, 20% Somewhat a reason, 44% Not a reason
8. Cannot afford a hearing aid: 41% Reason, 9% Somewhat a reason, 50% Not a reason
9. Do not admit I have a hearing loss in public: 37% Reason, 11% Somewhat a reason, 52% Not a reason
10. Have not had hearing tested yet: 35% Reason, 13% Somewhat a reason, 52% Not a reason

Base: non owners Top 50% HL: n=204
Less important reasons for not having a hearing aid (II/II)

<table>
<thead>
<tr>
<th>Reason</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
<th>70%</th>
<th>80%</th>
<th>90%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ear doctors opinion (ENT)</td>
<td></td>
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<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>30%</td>
<td>21%</td>
<td>17%</td>
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<tr>
<td>Bad design</td>
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<tr>
<td>Have hearing loss in only one ear</td>
<td>31%</td>
<td>21%</td>
<td>17%</td>
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<tr>
<td>Have hearing loss only with low frequency sounds</td>
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<tr>
<td>Audiologists opinion</td>
<td>20%</td>
<td>17%</td>
<td>13%</td>
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<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>27%</td>
<td>11%</td>
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<tr>
<td>Family doctors opinion (GP)</td>
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<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>22%</td>
<td>16%</td>
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<tr>
<td>Do not know where to get hearing aids</td>
<td>28%</td>
<td>10%</td>
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<tr>
<td>Social / Family opinion such as child, spouse, friend</td>
<td>23%</td>
<td>9%</td>
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<tr>
<td>Another hearing aid owners opinion</td>
<td></td>
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<tr>
<td>I have vision or dexterity problems</td>
<td>18%</td>
<td>12%</td>
<td></td>
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<tr>
<td>Have tried hearing aid and they do not work</td>
<td>19%</td>
<td>8%</td>
<td></td>
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<tr>
<td>Had surgery - hearing aids won’t help</td>
<td>20%</td>
<td>7%</td>
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<tr>
<td>Hearing problem requires surgery</td>
<td>17%</td>
<td>9%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do not trust Audiologist</td>
<td>19%</td>
<td>5%</td>
<td></td>
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</tr>
</tbody>
</table>

Base: non owners Top 50% HL: n=204
Top 10 reasons for HA owners NOT using them

1. They do not restore your hearing to normal
   - Reason: 65%
   - Somewhat a reason: 20%
   - Not a reason: 15%

2. They do not work well in noisy situations
   - Reason: 63%
   - Somewhat a reason: 18%
   - Not a reason: 19%

3. Uncomfortable
   - Reason: 62%
   - Somewhat a reason: 16%
   - Not a reason: 22%

4. Have tried hearing aid and they do not work
   - Reason: 56%
   - Somewhat a reason: 13%
   - Not a reason: 31%

5. Bad design
   - Reason: 44%
   - Somewhat a reason: 18%
   - Not a reason: 38%

6. Hearing loss not severe enough
   - Reason: 33%
   - Somewhat a reason: 19%
   - Not a reason: 48%

7. Hear well enough in most situations
   - Reason: 27%
   - Somewhat a reason: 25%
   - Not a reason: 48%

8. Do not admit I have a hearing loss in public
   - Reason: 25%
   - Somewhat a reason: 23%
   - Not a reason: 52%

9. Have tinnitus (ringing in ears)
   - Reason: 28%
   - Somewhat a reason: 16%
   - Not a reason: 55%

10. Have hearing loss in only one ear
    - Reason: 26%
    - Somewhat a reason: 17%
    - Not a reason: 57%

Owners who don't use, n=55 (low sample!)
Social rejection because of hearing loss compared to the acceptance of hearing aids
64% 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?

- Never: 64%
- Rarely: 16%
- Occasionally: 14%
- Regularly: 6%

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

- Never: 25%
- Rarely: 34%
- Occasionally: 34%
- Regularly: 7%

Base: Top 50% hearing loss, no hearing aid n=204
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)?

- Hearing loss got/gets worse: 22%
- ENT/ Ear Doctor: 17%
- Hearing aid dispenser / Audiologist: 16%
- Spouse: 12%
- GP /Family doctor: 11%
- Friend / relative: 4%
- Child: 3%
- Free due to coverage by Insurance / Received hearing aid free of charge: 3%

Hearing aid owner (n=703)
## 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>7'694</td>
<td>9.2%</td>
<td>50.8%</td>
<td>49.5%</td>
<td>53.8%</td>
<td>49.7%</td>
</tr>
<tr>
<td>Female</td>
<td>7'785</td>
<td>8.5%</td>
<td>54.9%</td>
<td>50.5%</td>
<td>46.2%</td>
<td>50.3%</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>2'663</td>
<td>3.2%</td>
<td>73.3%</td>
<td>18.3%</td>
<td>3.5%</td>
<td>8.6%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1'825</td>
<td>4.4%</td>
<td>45.7%</td>
<td>12.4%</td>
<td>6.7%</td>
<td>5.0%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>2'147</td>
<td>4.5%</td>
<td>41.8%</td>
<td>14.5%</td>
<td>8.6%</td>
<td>5.5%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1'982</td>
<td>5.7%</td>
<td>32.2%</td>
<td>13.3%</td>
<td>11.8%</td>
<td>5.0%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>2'015</td>
<td>7.2%</td>
<td>38.8%</td>
<td>13.3%</td>
<td>13.7%</td>
<td>7.8%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>1'968</td>
<td>9.8%</td>
<td>43.4%</td>
<td>12.6%</td>
<td>16.9%</td>
<td>11.6%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1'515</td>
<td>15.9%</td>
<td>56.1%</td>
<td>9.0%</td>
<td>16.4%</td>
<td>18.7%</td>
</tr>
<tr>
<td>74+</td>
<td>1'364</td>
<td>30.6%</td>
<td>65.4%</td>
<td>6.7%</td>
<td>22.4%</td>
<td>37.8%</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>1'796</td>
<td>16.6%</td>
<td>56.4%</td>
<td>10.6%</td>
<td>20.1%</td>
<td>23.2%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>3'511</td>
<td>12.9%</td>
<td>58.5%</td>
<td>21.7%</td>
<td>29.1%</td>
<td>36.6%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>7'227</td>
<td>5.4%</td>
<td>44.4%</td>
<td>48.4%</td>
<td>33.7%</td>
<td>24.0%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>1'368</td>
<td>5.1%</td>
<td>37.4%</td>
<td>9.2%</td>
<td>6.7%</td>
<td>3.6%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>192</td>
<td>33.3%</td>
<td>66.8%</td>
<td>0.9%</td>
<td>3.3%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Other</td>
<td>1'384</td>
<td>6.8%</td>
<td>51.0%</td>
<td>9.1%</td>
<td>7.1%</td>
<td>6.6%</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>7'925</td>
<td>12.3%</td>
<td>52.5%</td>
<td>49.3%</td>
<td>71.6%</td>
<td>70.7%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>2'636</td>
<td>8.9%</td>
<td>59.0%</td>
<td>17.0%</td>
<td>15.0%</td>
<td>19.2%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>3'899</td>
<td>2.5%</td>
<td>41.1%</td>
<td>26.9%</td>
<td>8.8%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Other person</td>
<td>1'019</td>
<td>6.2%</td>
<td>52.6%</td>
<td>6.8%</td>
<td>4.6%</td>
<td>4.6%</td>
</tr>
</tbody>
</table>

**Employment**

<table>
<thead>
<tr>
<th>Employment</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>Full time employed</td>
<td>5'517</td>
<td>6.2%</td>
<td>37.6%</td>
<td>45.5%</td>
<td>34.5%</td>
<td>19.6%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>1'522</td>
<td>6.9%</td>
<td>43.6%</td>
<td>12.5%</td>
<td>9.6%</td>
<td>7.0%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>1'439</td>
<td>8.0%</td>
<td>36.9%</td>
<td>11.6%</td>
<td>11.8%</td>
<td>6.5%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
<td>474</td>
<td>20.5%</td>
<td>64.6%</td>
<td>3.3%</td>
<td>5.5%</td>
<td>9.5%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>583</td>
<td>13.1%</td>
<td>66.7%</td>
<td>4.5%</td>
<td>4.1%</td>
<td>7.7%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>2'272</td>
<td>23.0%</td>
<td>61.4%</td>
<td>15.4%</td>
<td>32.4%</td>
<td>48.6%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>839</td>
<td>2.5%</td>
<td>33.8%</td>
<td>7.2%</td>
<td>2.2%</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

**Education**

<table>
<thead>
<tr>
<th>Education</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>Secondary/Grammar School</td>
<td>2'518</td>
<td>14.1%</td>
<td>53.4%</td>
<td>19.0%</td>
<td>26.6%</td>
<td>28.7%</td>
</tr>
<tr>
<td>^O^ Levels</td>
<td>1'720</td>
<td>12.4%</td>
<td>53.8%</td>
<td>13.3%</td>
<td>15.9%</td>
<td>17.5%</td>
</tr>
<tr>
<td>^A^ Levels</td>
<td>2'198</td>
<td>6.7%</td>
<td>42.3%</td>
<td>18.0%</td>
<td>13.7%</td>
<td>9.5%</td>
</tr>
<tr>
<td>Ordinary National Certificate</td>
<td>573</td>
<td>10.0%</td>
<td>54.5%</td>
<td>4.5%</td>
<td>4.2%</td>
<td>4.7%</td>
</tr>
<tr>
<td>Higher National Certificate</td>
<td>874</td>
<td>10.3%</td>
<td>48.2%</td>
<td>6.9%</td>
<td>7.5%</td>
<td>6.6%</td>
</tr>
<tr>
<td>Technical High School</td>
<td>657</td>
<td>13.2%</td>
<td>49.8%</td>
<td>5.0%</td>
<td>7.0%</td>
<td>6.6%</td>
</tr>
<tr>
<td>University</td>
<td>3'351</td>
<td>6.9%</td>
<td>53.0%</td>
<td>27.4%</td>
<td>17.5%</td>
<td>18.6%</td>
</tr>
<tr>
<td>Other</td>
<td>756</td>
<td>13.1%</td>
<td>52.2%</td>
<td>5.8%</td>
<td>7.6%</td>
<td>7.9%</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>
<th>Real value is within interval:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Level of proportion: 50%/50%</td>
</tr>
<tr>
<td>50</td>
<td>± 13.9</td>
<td>± 9.9</td>
</tr>
<tr>
<td>100</td>
<td>± 9.8</td>
<td>± 7.0</td>
</tr>
<tr>
<td>250</td>
<td>± 6.2</td>
<td>± 4.4</td>
</tr>
<tr>
<td>500</td>
<td>± 4.4</td>
<td>± 3.1</td>
</tr>
<tr>
<td>1'000</td>
<td>± 3.1</td>
<td>± 2.2</td>
</tr>
<tr>
<td>5’000</td>
<td>± 1.4</td>
<td>± 1.0</td>
</tr>
<tr>
<td>10’000</td>
<td>± 1.0</td>
<td>± 0.7</td>
</tr>
</tbody>
</table>