

Results

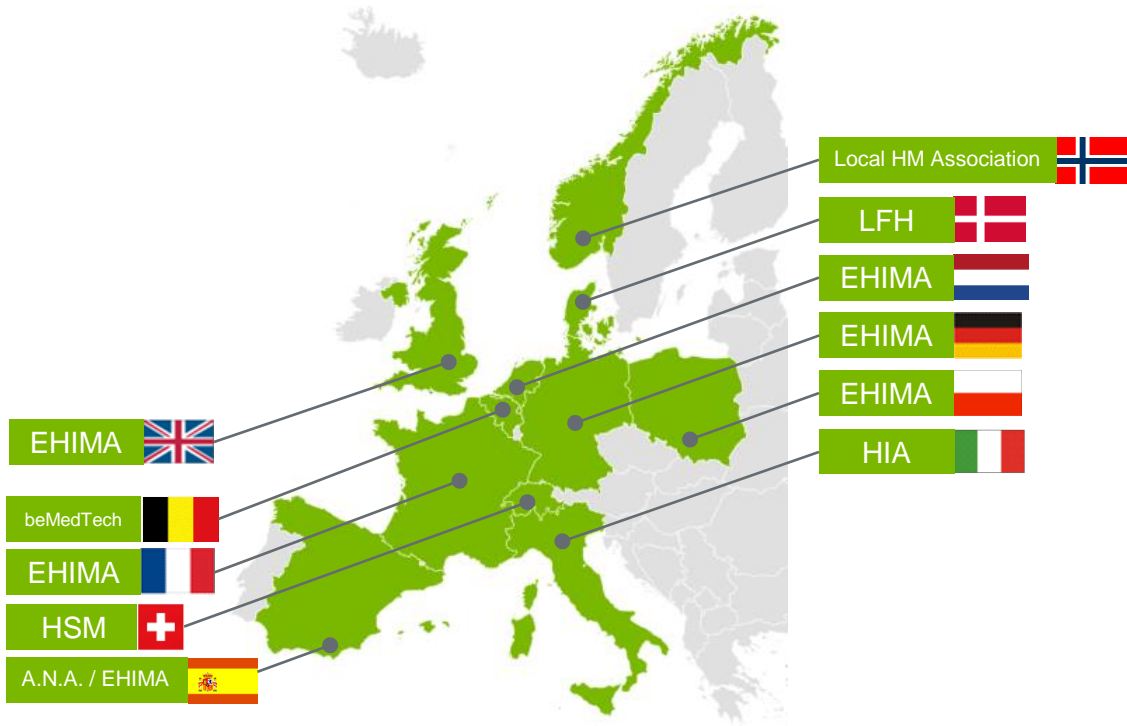
EuroTrak ESP 2023

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

Summary

1. Introduction

EuroTrak ESP 2023 is part of the EuroTrak / APACTrak studies:



EuroTrak ESP 2023 was designed and executed by Anovum (Zurich) on behalf of A.N.A. / EHIMA

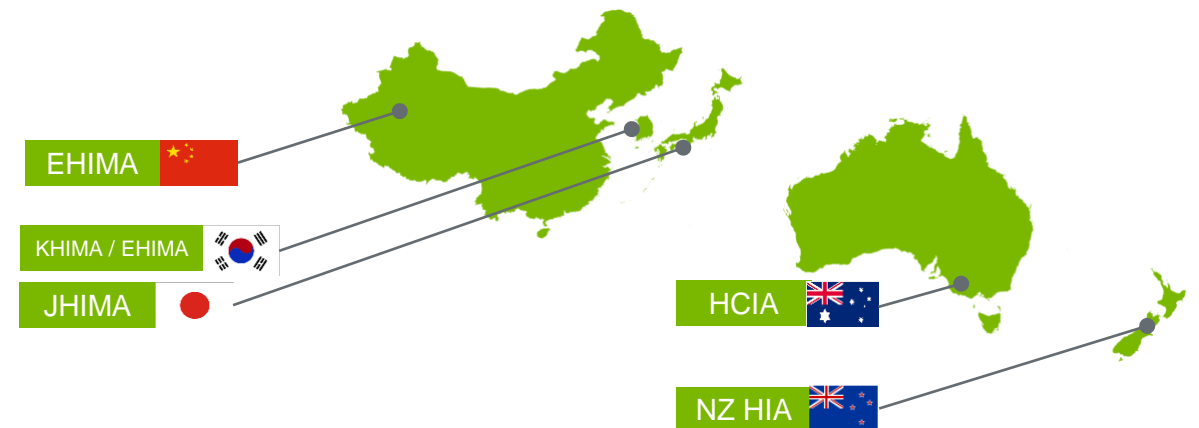
Sample sizes:

Representative sample (sample 1): n=15'387 people

Hearing impaired (sample 2): n=1'311 people

Hearing impaired non-owners (HA Non-owner): n=804 people

Hearing aid owner (HA Owner): n=507 people



Summary

2. Market overview

- **Stated hearing loss prevalence**
 - Total: 10.6%, 18+: 12.3% (2020: 11.3 18+: 13.3%).
 - Hearing Tests: 46% had a hearing test in the last 5 years (2020: 50%), and family doctors do most tests followed by ENTs and Audiologists.
- **Hearing aid adoption rate (HA penetration)**
 - 39% of those with self-declared HL (2020: 37%).
 - 4.1% of total population (2020: 4.1%).
 - 55% of HA owners have binaural treatment (2020: 47%).
- **The route to the hearing aid**
 - 79% 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=26% / 2020: 27%).
 - 65% of the GP consultations referred to an ENT, 25% to an HA dispenser / Audiologist, and 17% to get hearing aids. 8% recommended no action.
 - 39% of ENT consultations were referred to an Audiologist, 40% recommended getting a hearing aid, and 28% 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 the 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**

- 26% of all HA owners received some 3rd party reimbursement.
- 79% of owned HAs were bought in 2020 or later.
- The average age of the currently owned HAs is 2.8 years.
- The median age of hearing aids before replacement is 6 years.
- On average, HAs are worn 8.7 hours a day.
- RIC is the most often purchased type of HA.
- Cochlear Implants: 24% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
- 35% of HA owners use a hearing aids app, and 69% are satisfied with it.
- 14% of the HAs are (to the knowledge of the owners) equipped with Telecoil. The primary usage of Telecoil is with phones.

- **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 (2020: 78%).
- The more hours wore per day, the higher the satisfaction with the HA.
- Satisfaction with newer hearing aids is higher than with older hearing aids.
- Talking with family members at home, 1 to 1 conversations, talking on the phone as well as watching TV are the most critical listening situations.

- **Positive impact of HAs**

- The significant positive impact of HAs on different aspects: Especially Relationships at home, the ability to communicate, participate in group activities, sense of safety, social life, self-confidence and sense of independence improved.
- 96% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
- 87% 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 11% 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 people think they are uncomfortable, would be embarrassed and argue they can't afford them.
- 4% who own hearing aids don't use them (0 hours); 13% 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 that somebody makes fun of or rejects a hearing impaired without a hearing aid.
- The most important influencing factors for HA owners were worsening hearing loss, ENT, GP, spouse child, and an audiologist. For the non-owners, financial aspects play a crucial role (price, insurance coverage, financial situation).

Detailed Results: Roadmap

1. Introduction

- Organisation of EuroTrak ESP 2023
- 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 ESP 2023

Organisation

- Principal of the project EuroTrak ESP 2023 is A.N.A. and EHIMA.
- Anovum Zurich developed the concept of EuroTrak ESP, 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

- A.N.A. 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 ESP/2023/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=15'387** people based on census data.

Step 2: Target population interviews

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

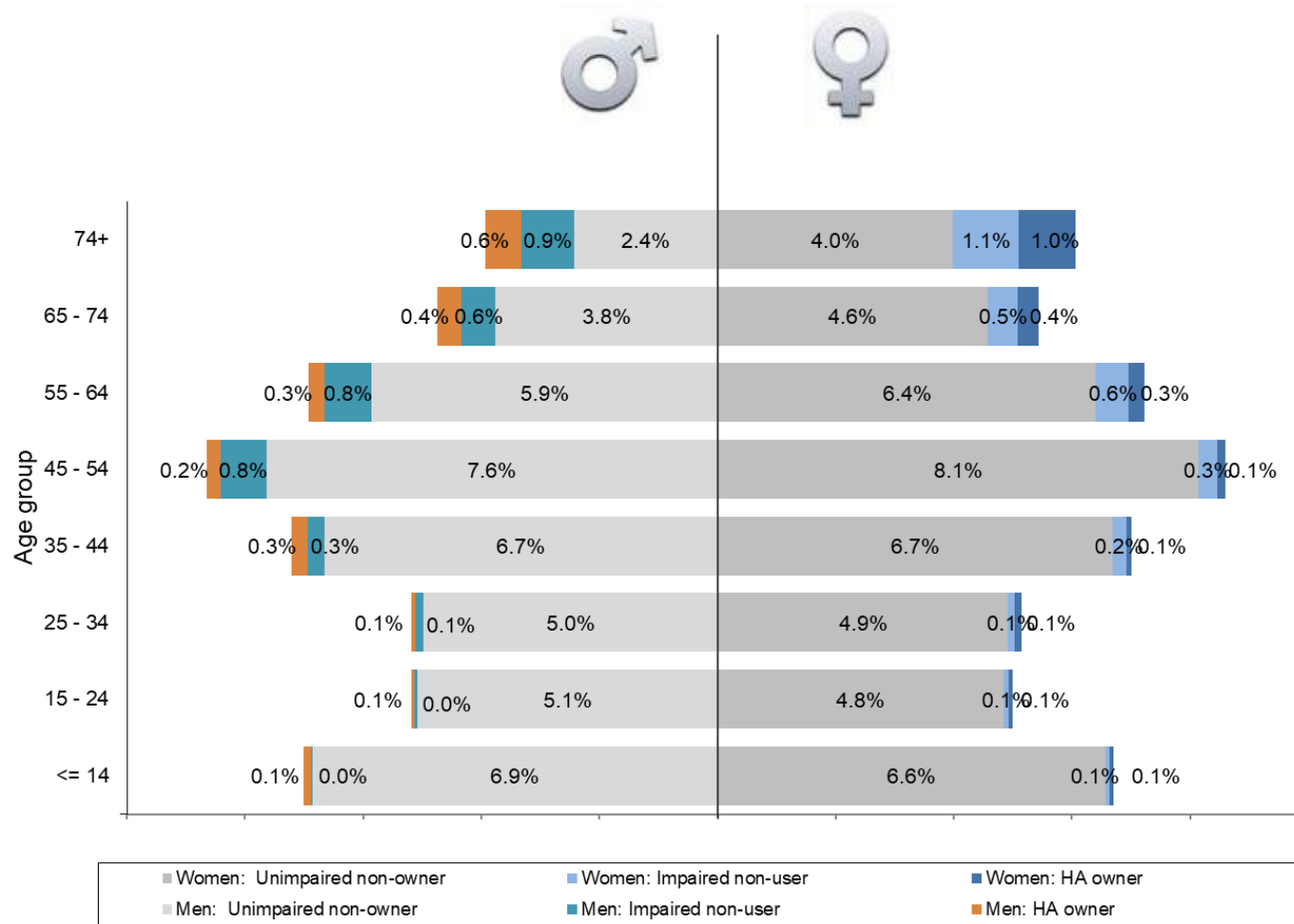
Process:

1. Main questionnaires: Owners and hearing impaired non-owners
2. Balancing through weighting according to representative screening interviews
3. Resulting sample: **n=804** hearing impaired non-owners and **n=507** hearing aid owners

2. Market overview

Prevalence of hearing loss and adoption rate

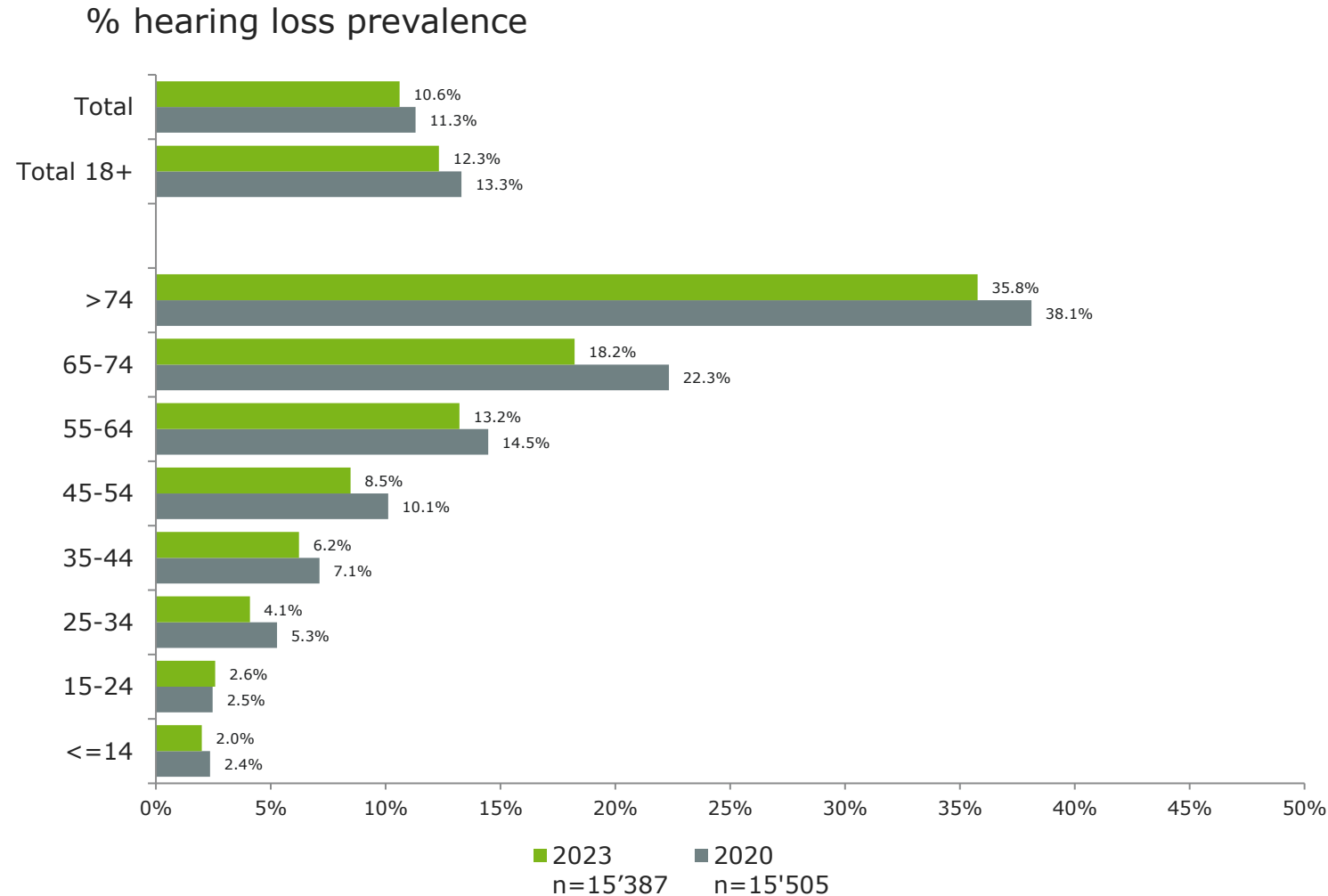
Hearing loss and hearing instrument ownership by gender/age



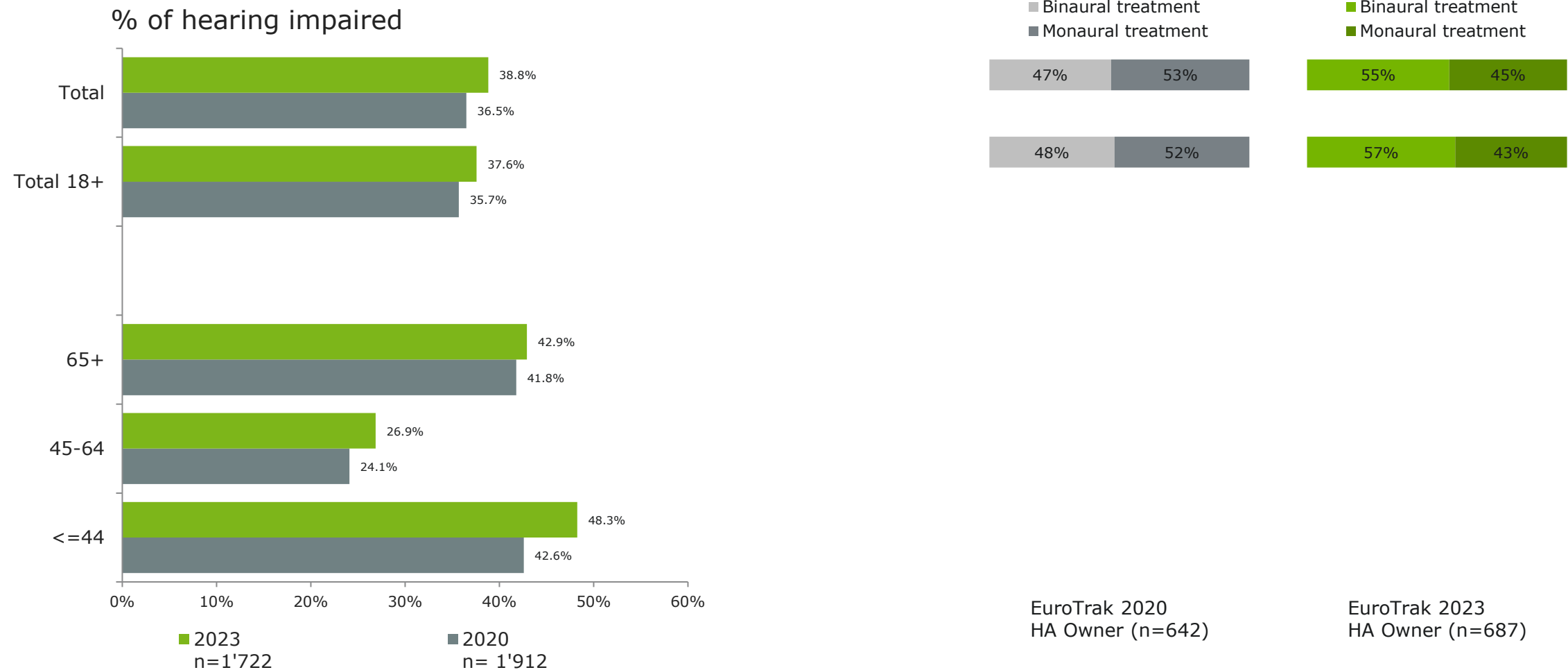
n=15'387

Hearing loss prevalence ESP

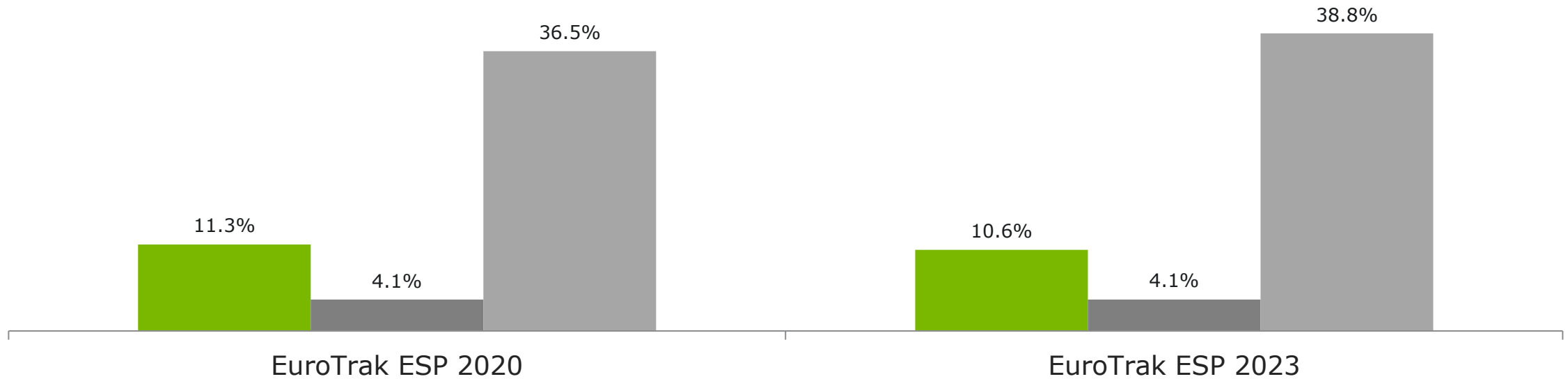
Self declared hearing loss



Hearing aid adoption rate: 39% of the hearing impaired have hearing aid(s), and 55% of them have binaural treatment

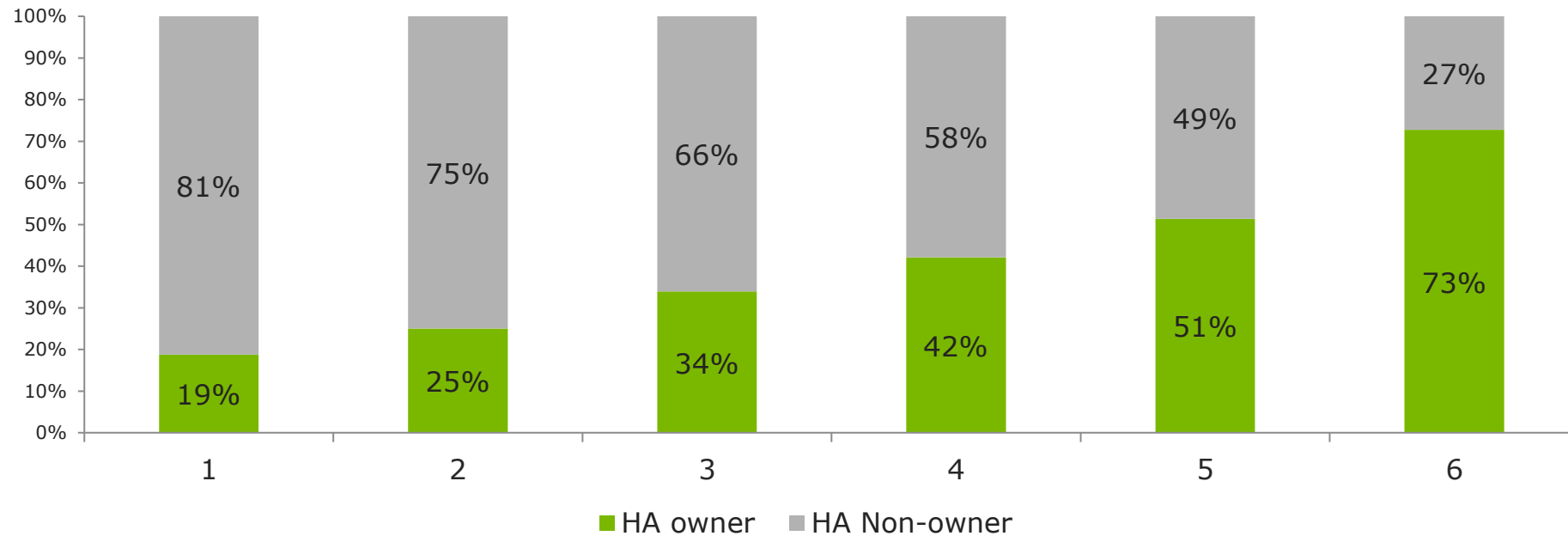


Overview hearing loss prevalence and hearing aid adoption



■ Hearing impaired (self-stated) ■ HA Adoption rate (people with hearing aids in % of population) ■ HA Adoption rate (people with hearing aids in % of hearing impaired)

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



Hearing loss sixtile-groups

* 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).

HA Owner n=507
HA Non-owner n=804

Hearing loss

Hearing loss characteristics: Owners compared to non-owners

	HA Non-owner n=804	HA Owner n=507	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	44%	30%	32%
Bilateral loss	56%	70%	47%
Perceived loss			
Mild	41%	9%	12%
Moderate	44%	44%	39%
Severe	13%	38%	68%*
Profound	2%	9%	

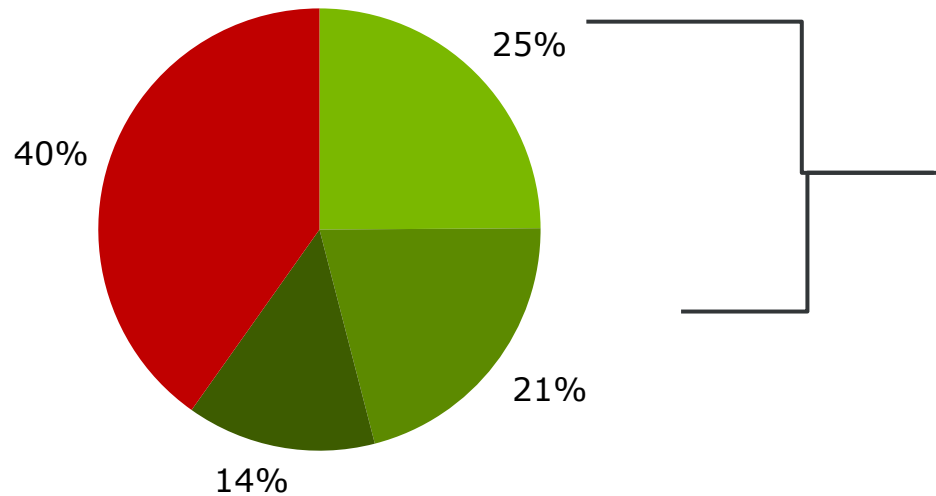
* combined "severe" and "profound" because n is too small

Hearing tests and where hearing is tested

Hearing Tests: 46% had a hearing test in the last 5 years (2020: 50%), most tests done by family doctors

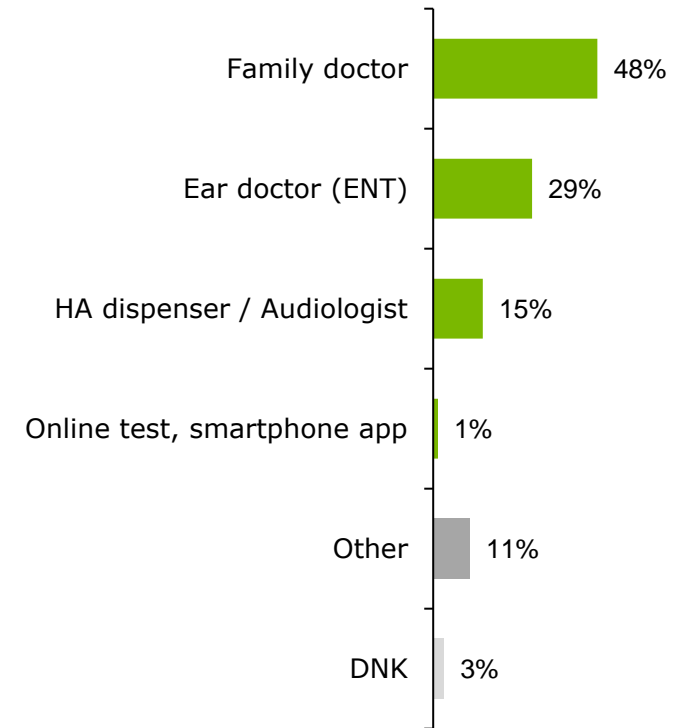
Have you ever taken a hearing test?

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



n=13'288

Where/how was your hearing tested?

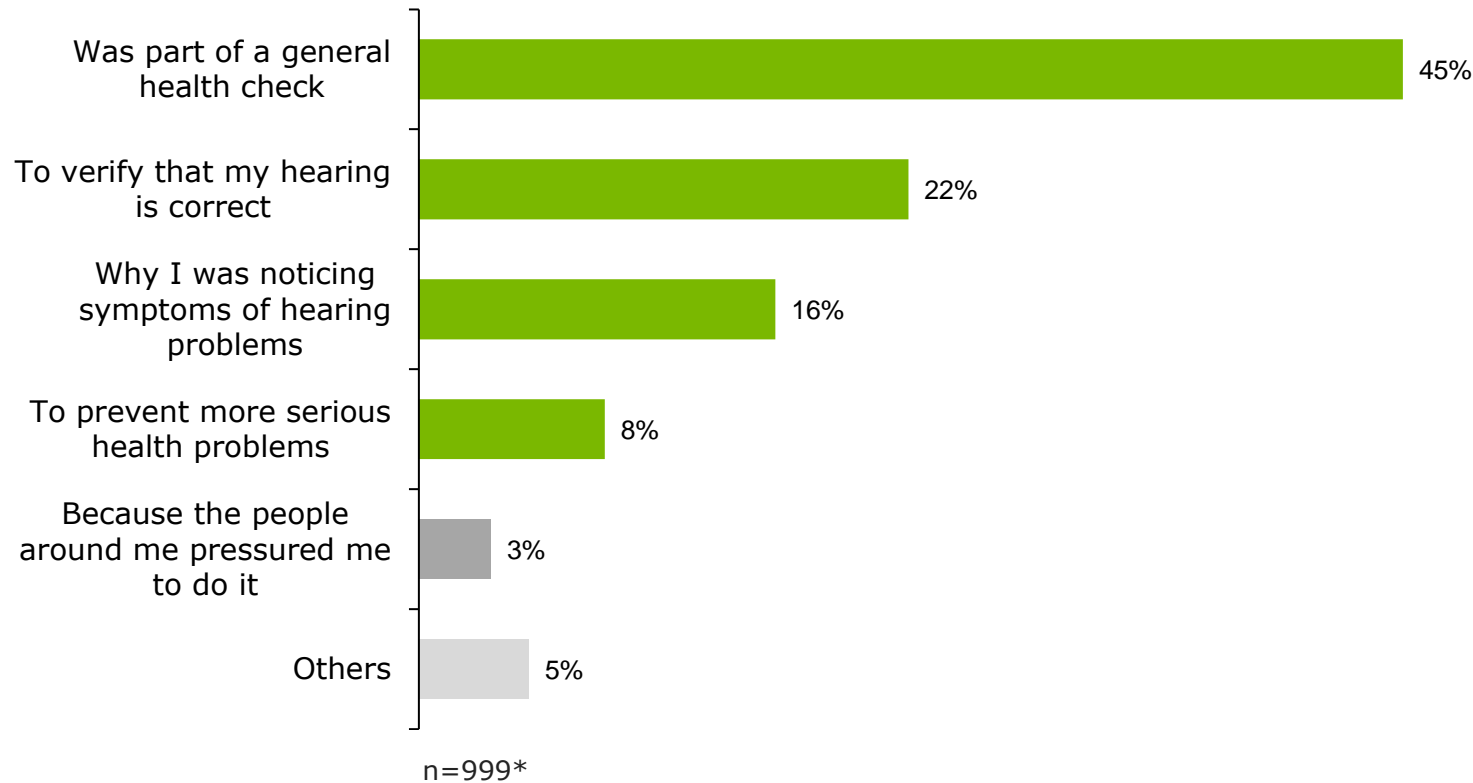


n=6'153



Most tests in the last 12 months were done as part of a general health check

What was your main motivation for having a hearing test? (people who declare having taken a test in the last 12 months)



* interviewed person, (older are underrepresented here)

SPAIN-specific question

¿Cuál fue su principal motivación para realizarse un test auditivo? (personas que declaran haberse hecho un test en los últimos 12 meses)

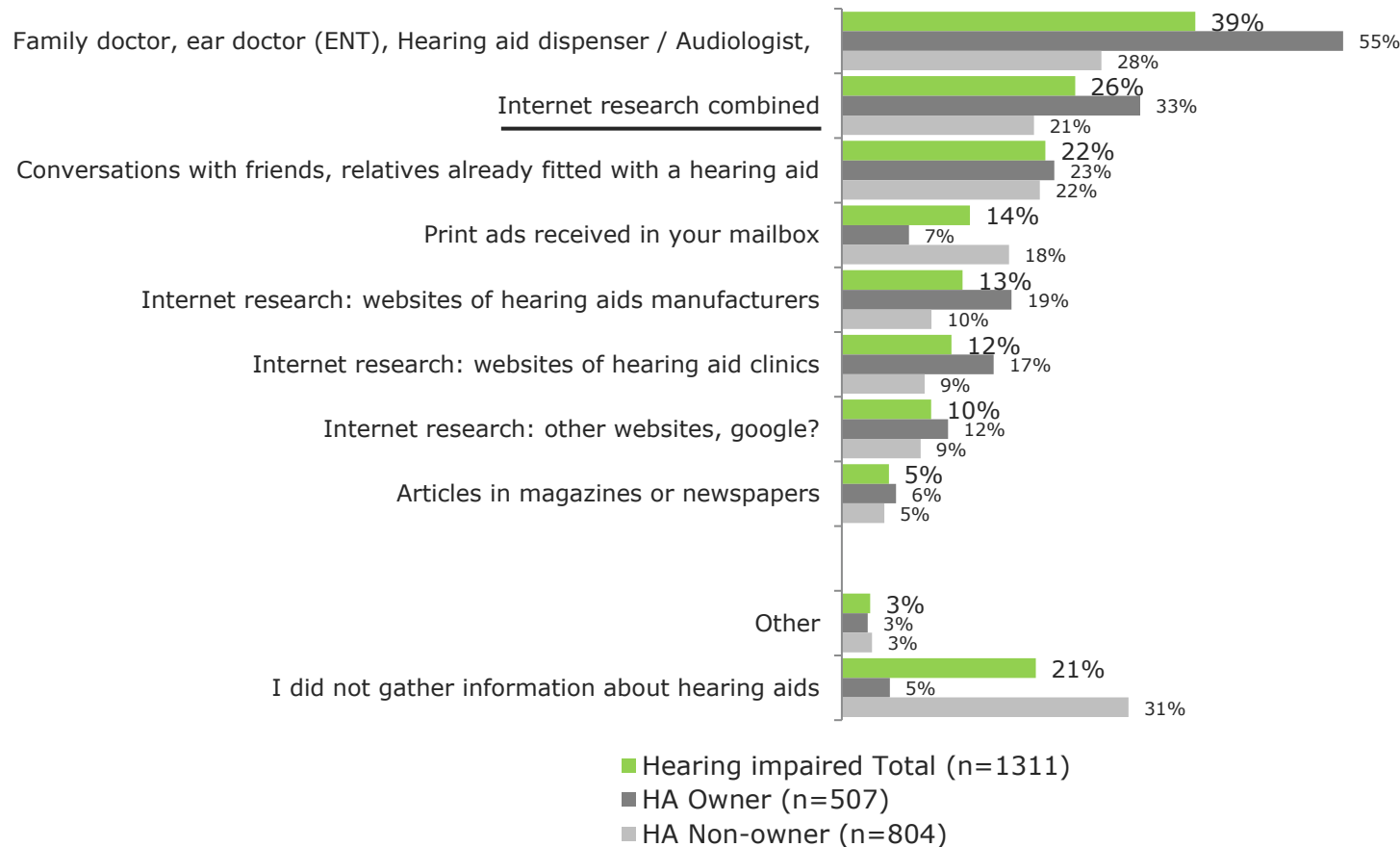
- Formó parte de un chequeo de salud general
- Para verificar que mi audición es correcta
- Para prevenir problemas de salud mas graves
- Porqué las personas de mi entorno me presionaron para realizarlo
- Porqué estaba notando síntomas de problemas de audición
- Otra



The route to the hearing aid: Sources of information and drop-out rates

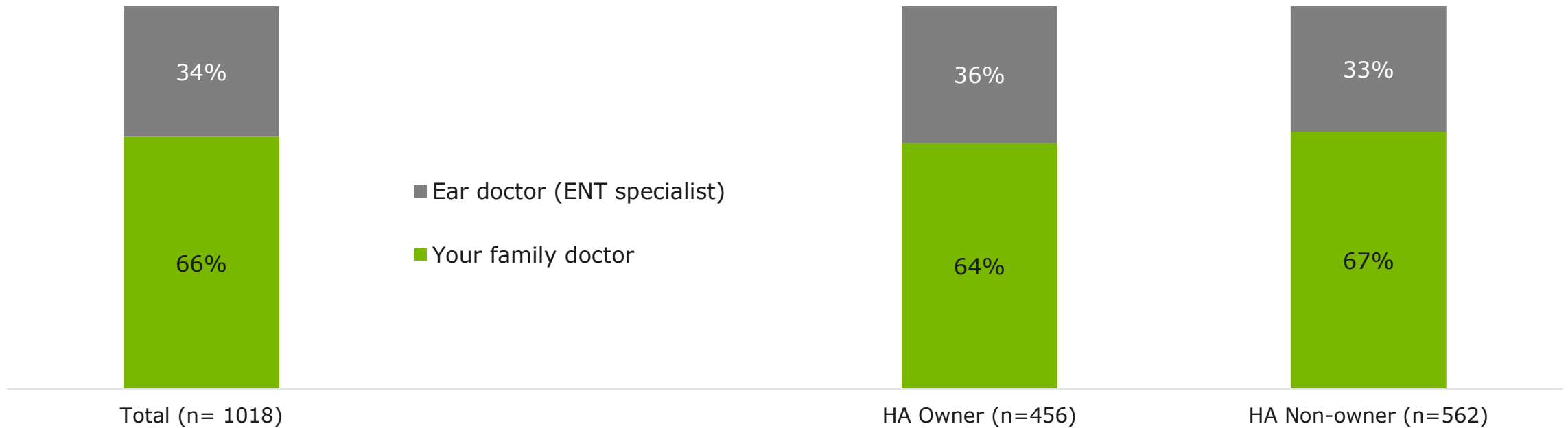
Doctors/HCPs are the most important sources of information and, therefore, the major gatekeepers

Where did you gather information about hearing aids?

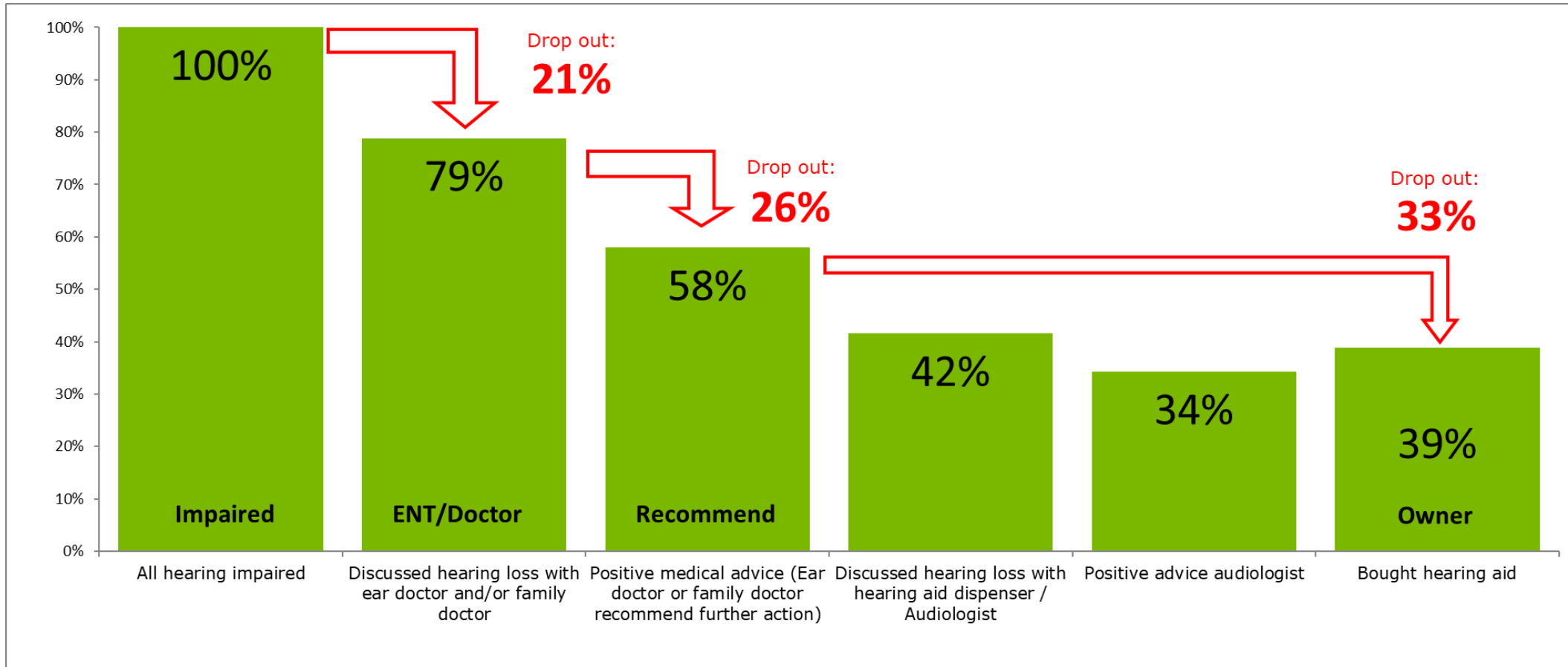


Of those who discussed the hearing loss with a doctor, 34% talked to an ear doctor (ENT) first, and 66% spoke to a GP/family doctor first

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)?



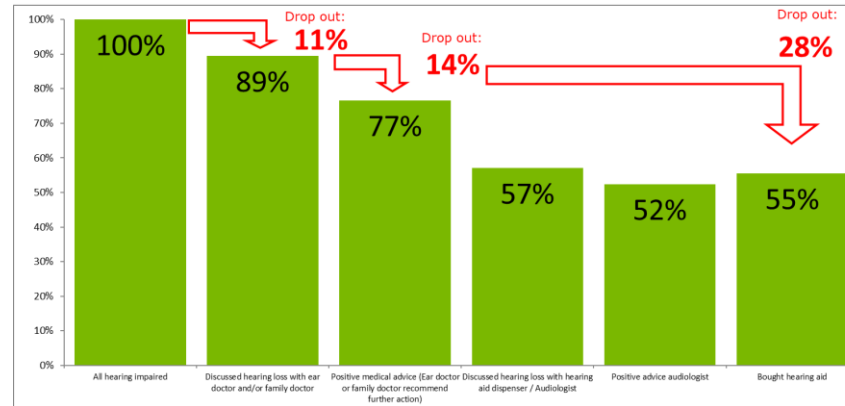
The route to the hearing aid



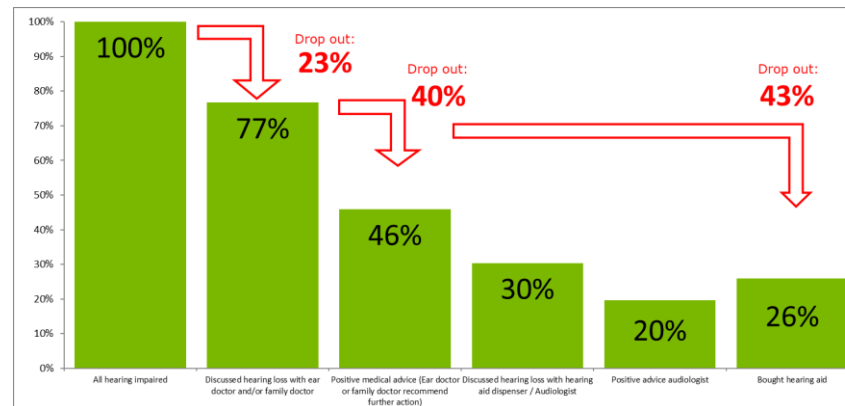
n=1311

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

Top 50% hearing loss*



Low 50% hearing loss*



n=1311

* 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:

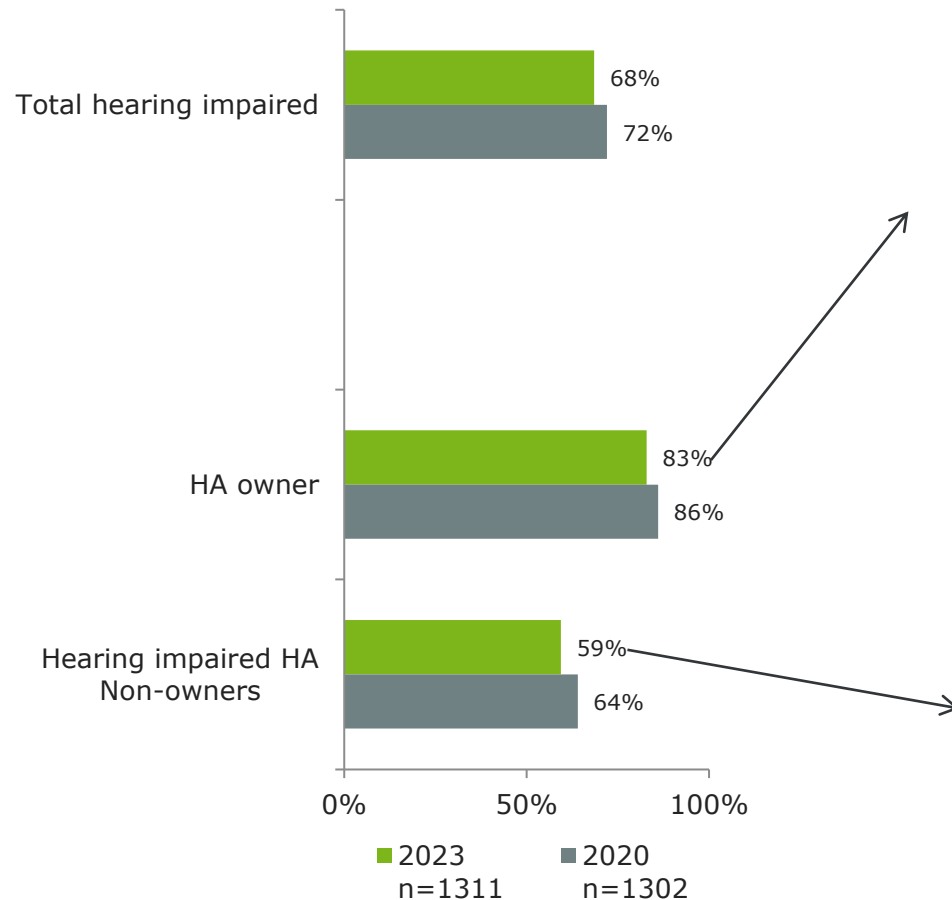
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC - like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

→ 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

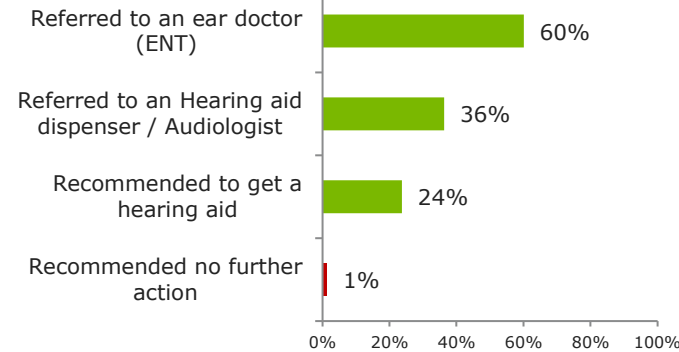
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

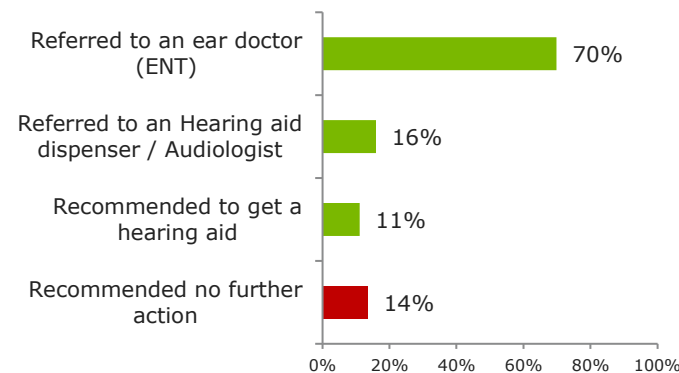


What did he/she recommend ?

HA Owner (n=417)



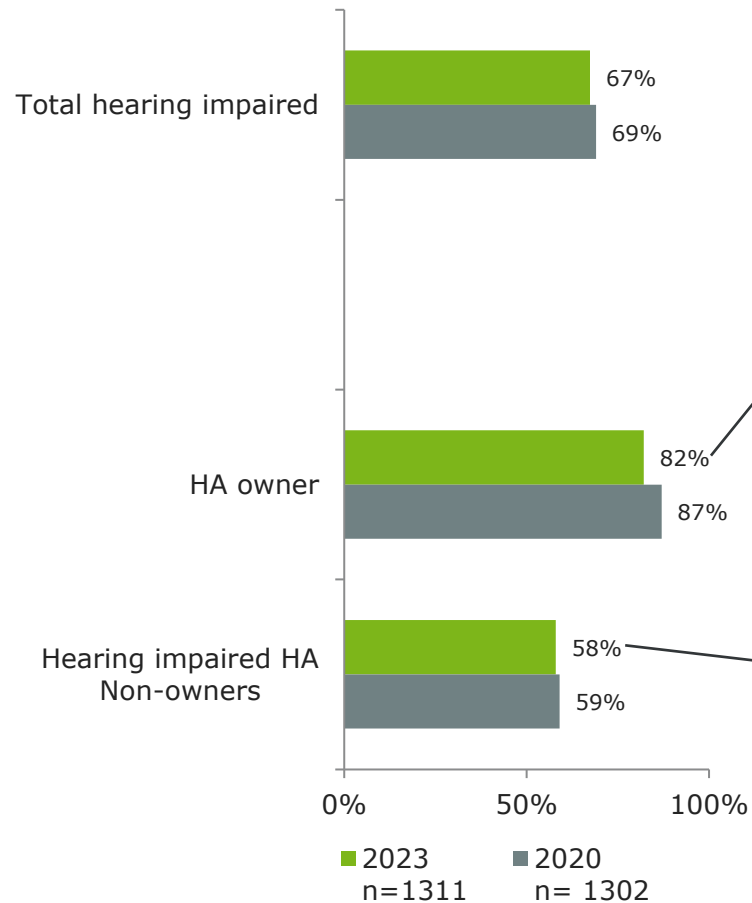
Impaired HA Non-owner (n=475)



The route to the hearing aid: ENT

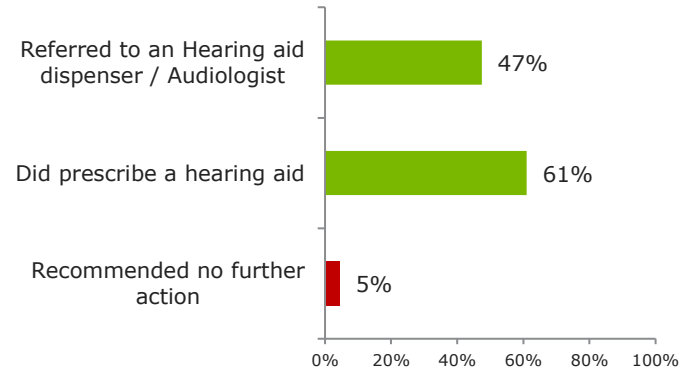
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

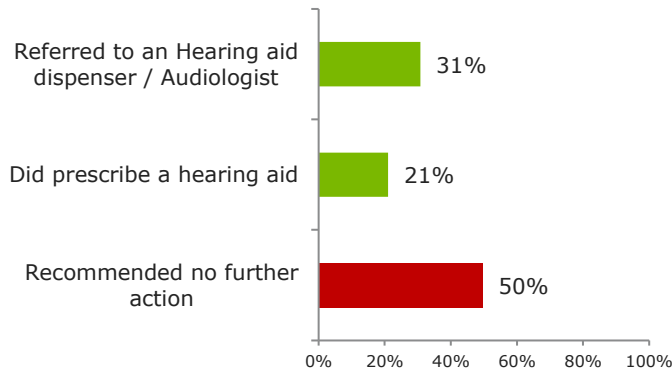


What did he/she recommend ?

HA Owner (n=428)



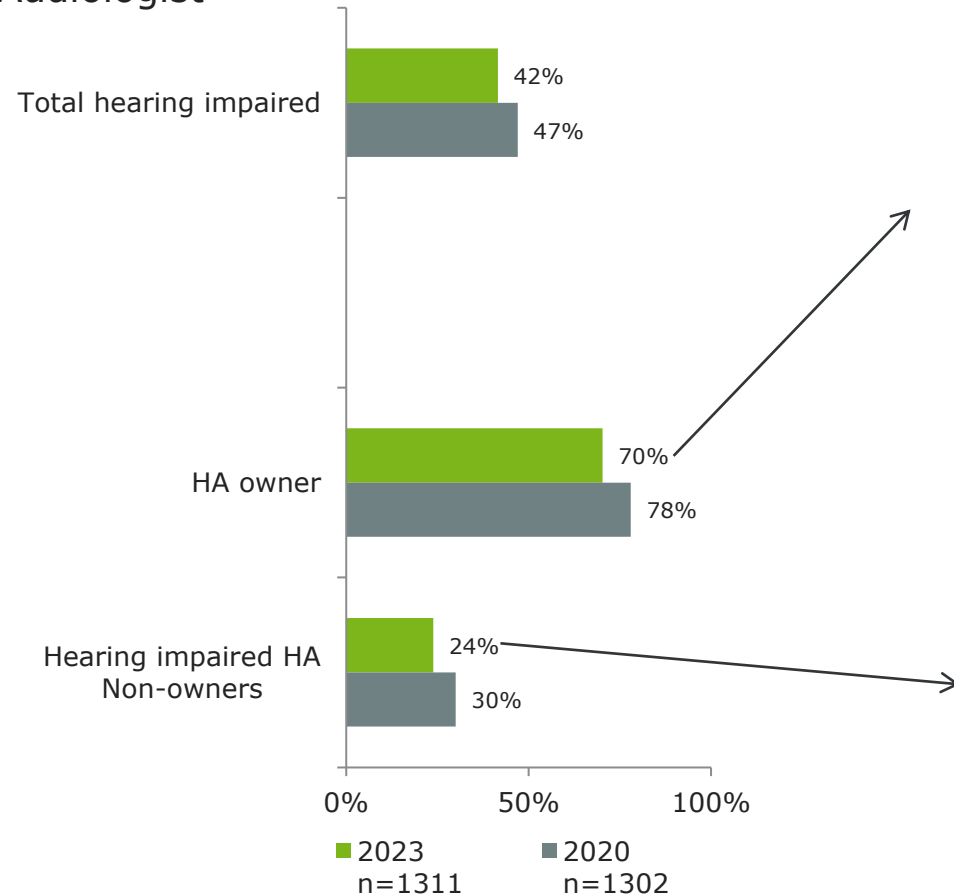
Impaired HA Non-owner (n=465)



The route to the hearing aid: Audiologist

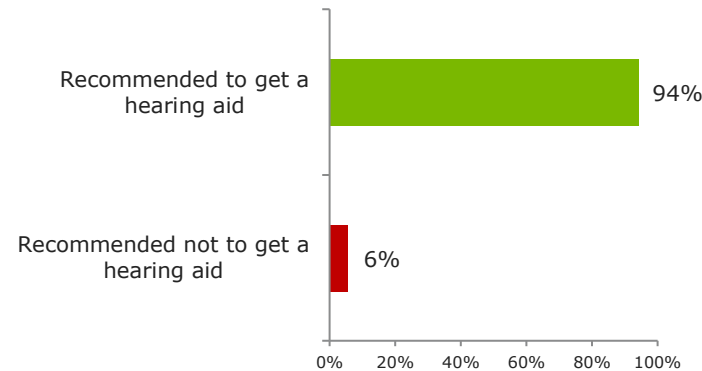
Have you ever discussed your hearing problem with a HA dispenser / Audiologist?

% Discussed with HA dispenser/
Audiologist

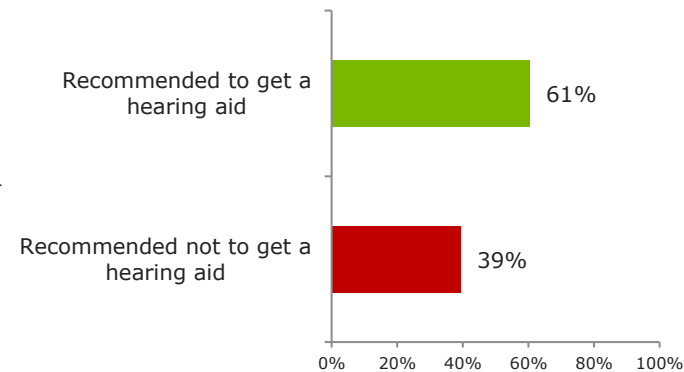


What did he/she recommend ?

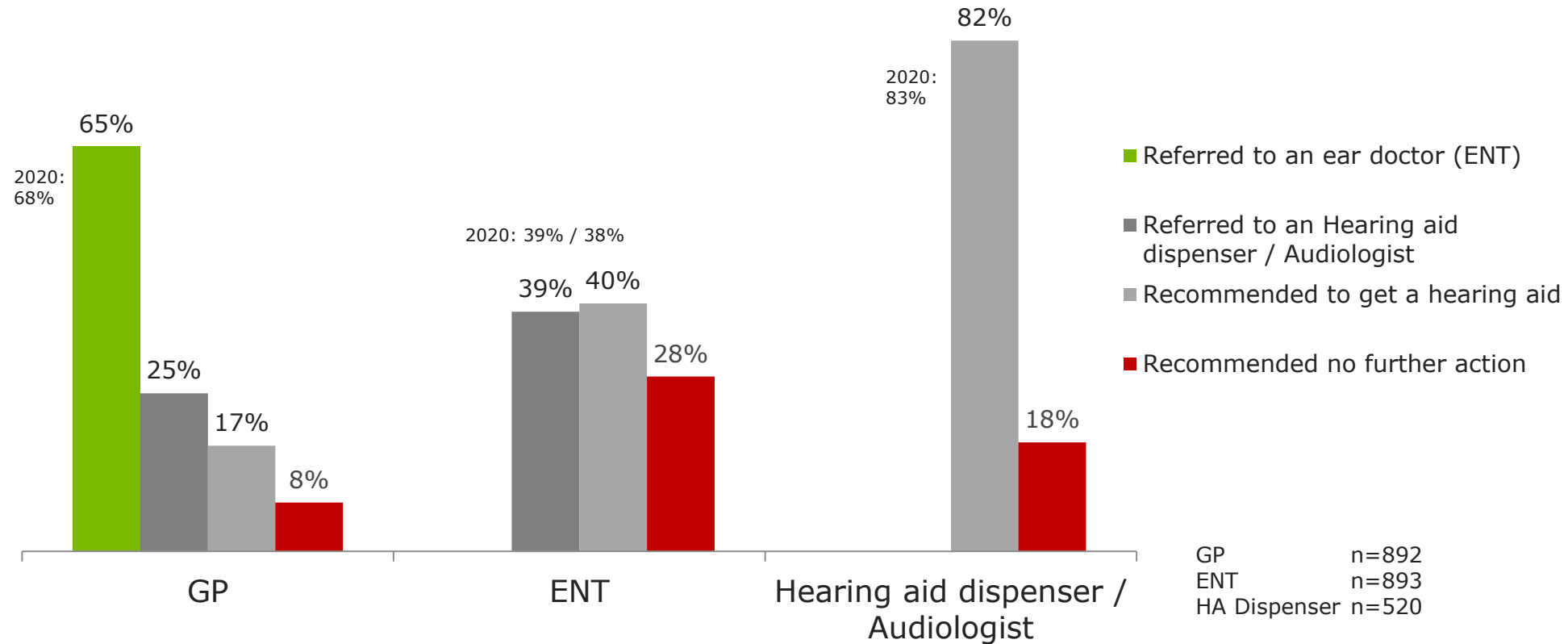
HA Owner (n=336)



Impaired HA Non-owner (n=184)



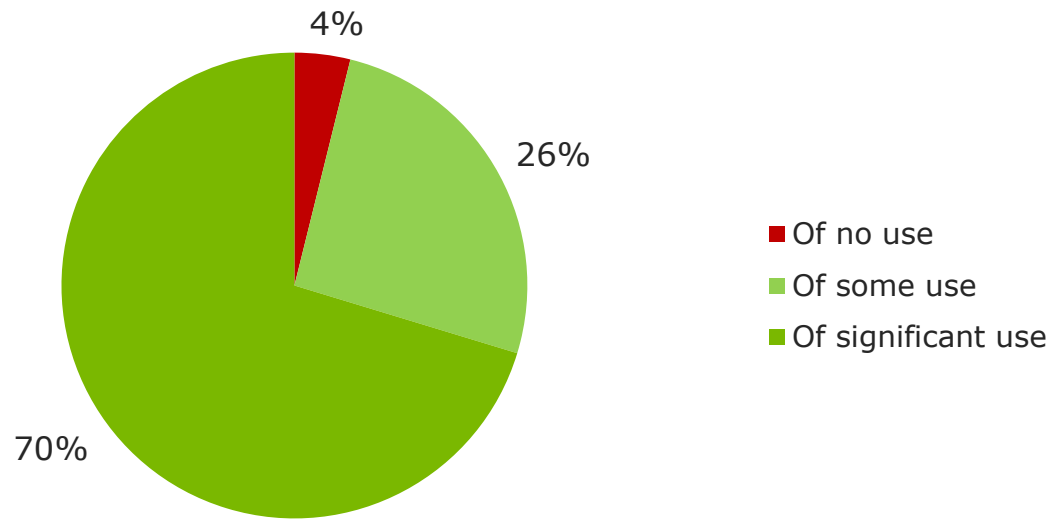
Recommendations by profession



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

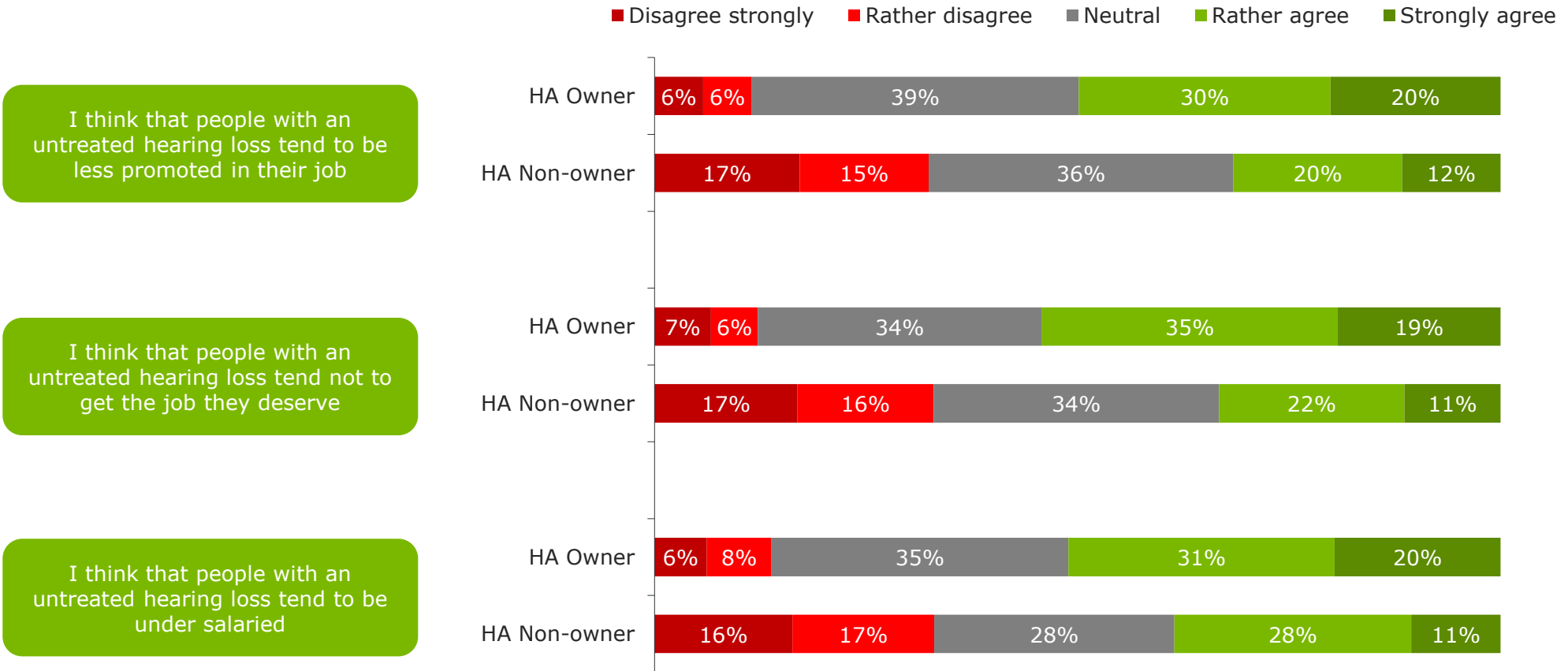
Work competitiveness: 96% of the working hearing aid owners state that their hearing aid(s) are useful on their job.

How useful are your hearing aids on your job?



Working HA Owner n=179

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.



HA Owner n=699 / HA Non-owner n=454



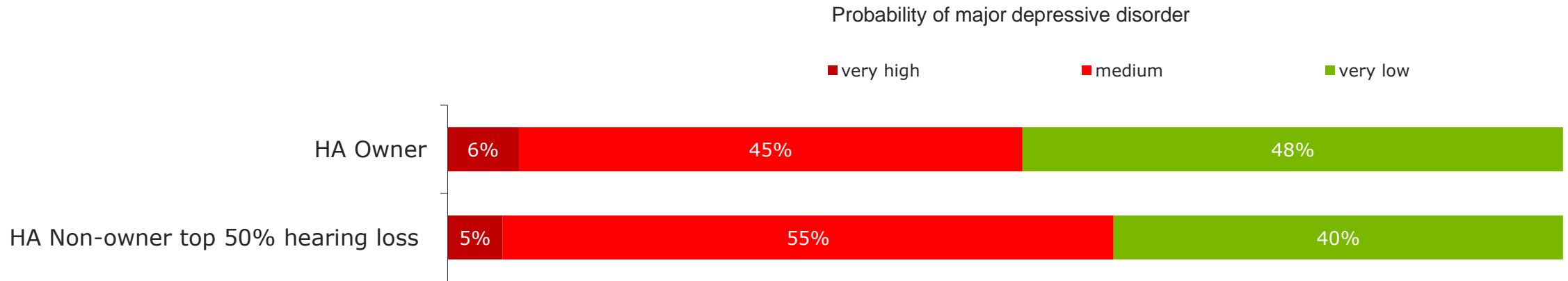
General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*).

Depression symptoms:

PHQ-2 Screening:

In the last 2 weeks:

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



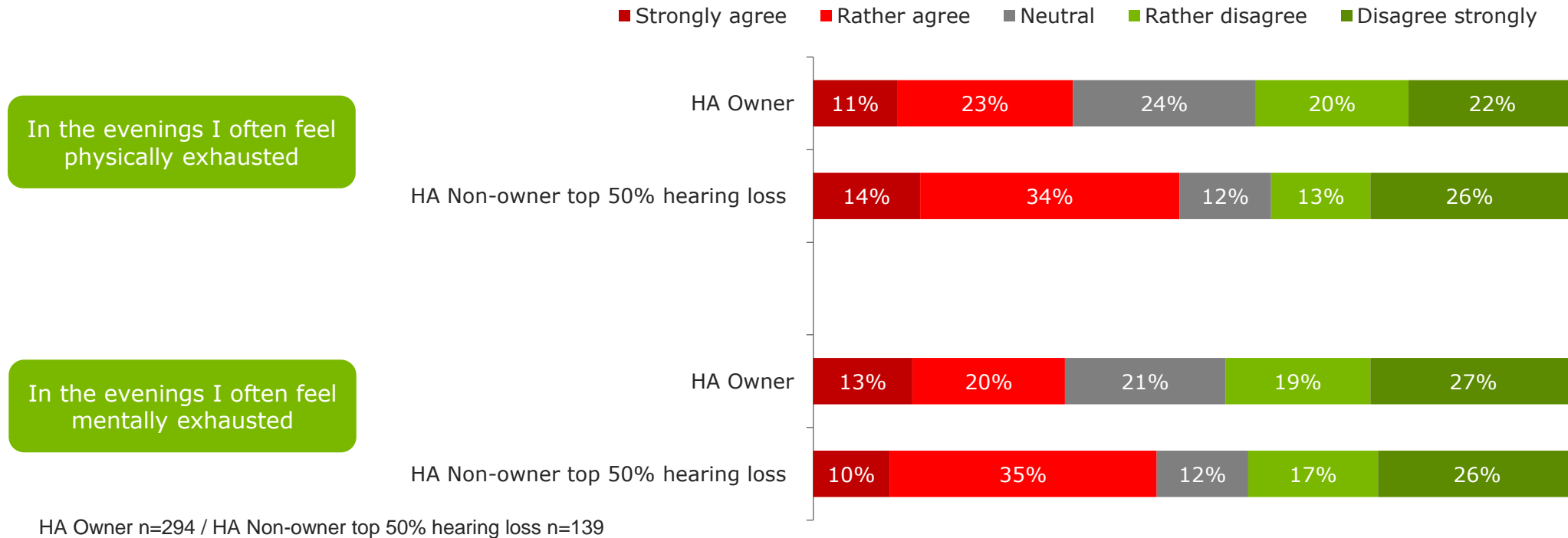
HA owner n=296 / HA Non-owner top 50% hearing loss n=139

*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



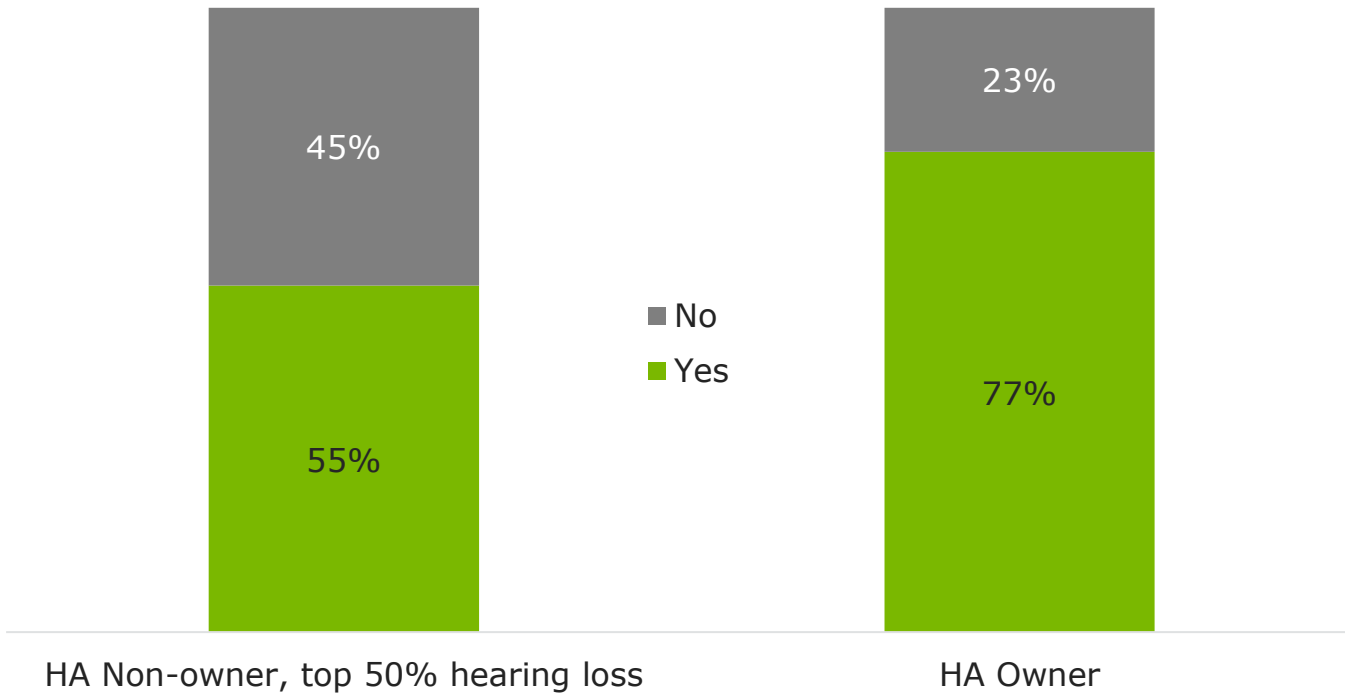
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 - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).



General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids

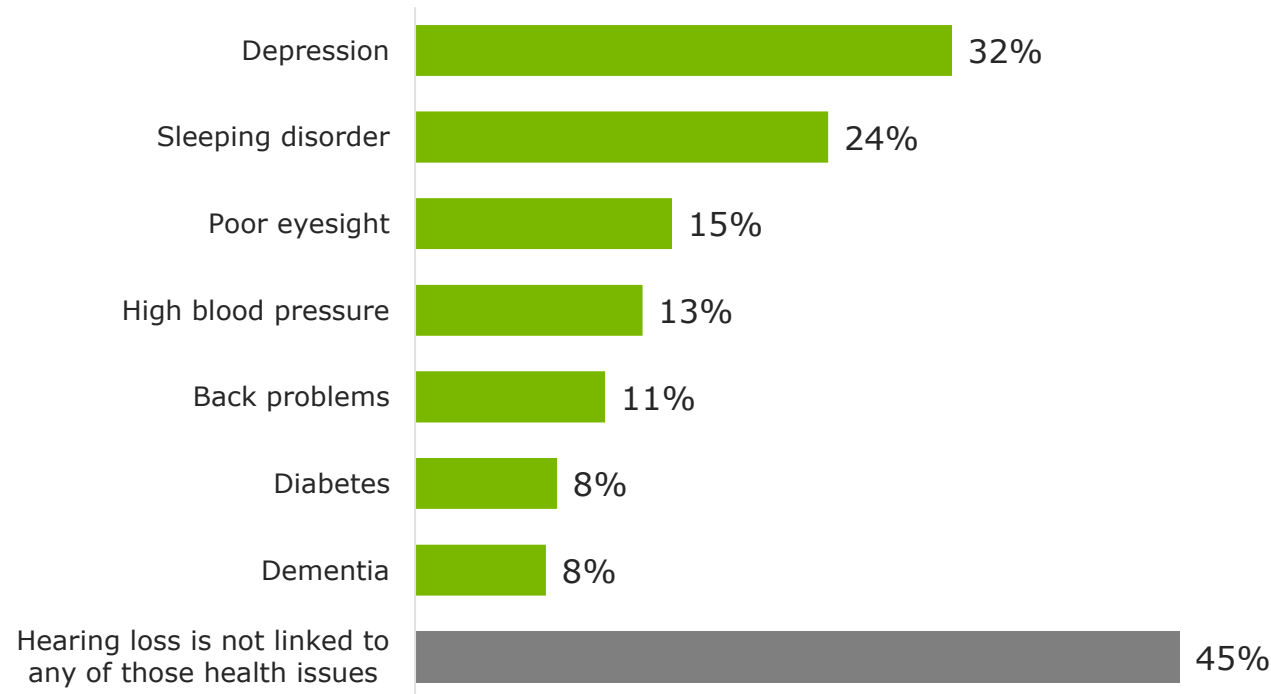
Are you generally satisfied with the quality of your sleep?



HA Non-owner top 50% hearing loss n=139 / HA Owner n=296

32% of all hearing-impaired think that hearing loss could be linked to depression

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

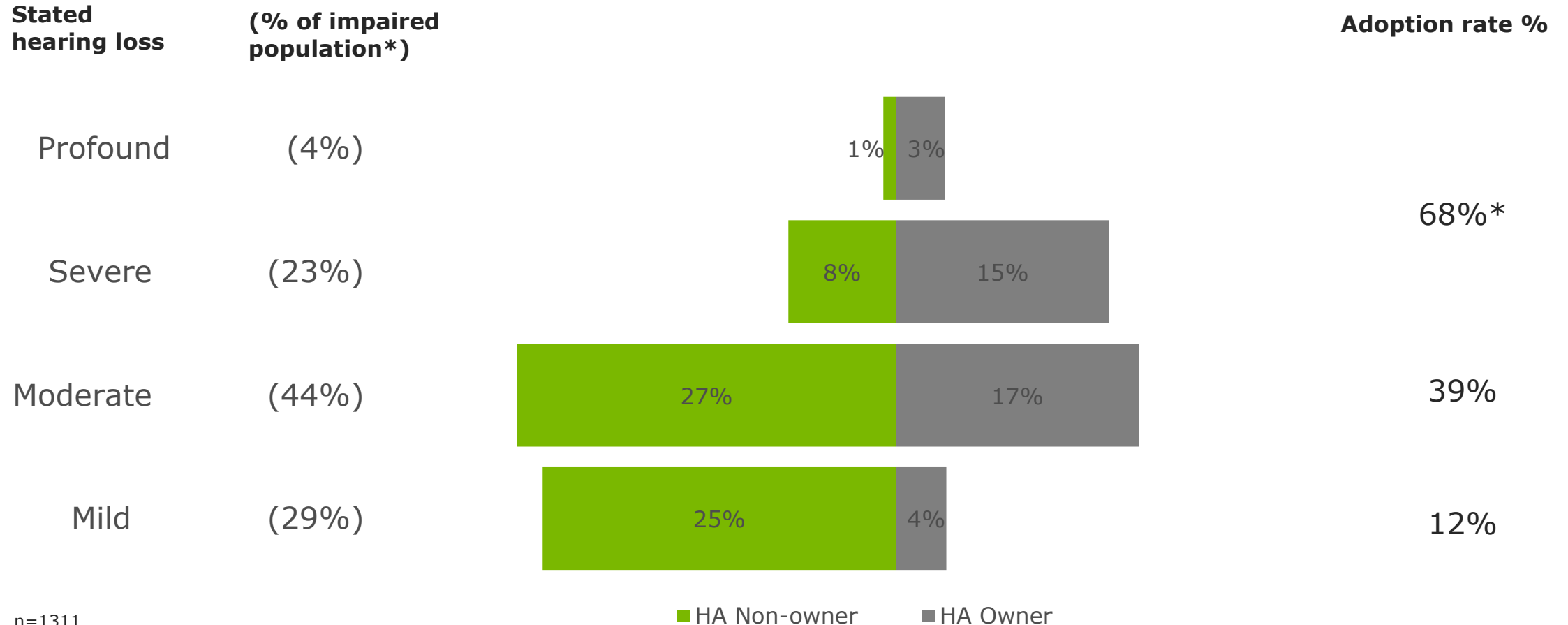


Hearing impaired, n=1311

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



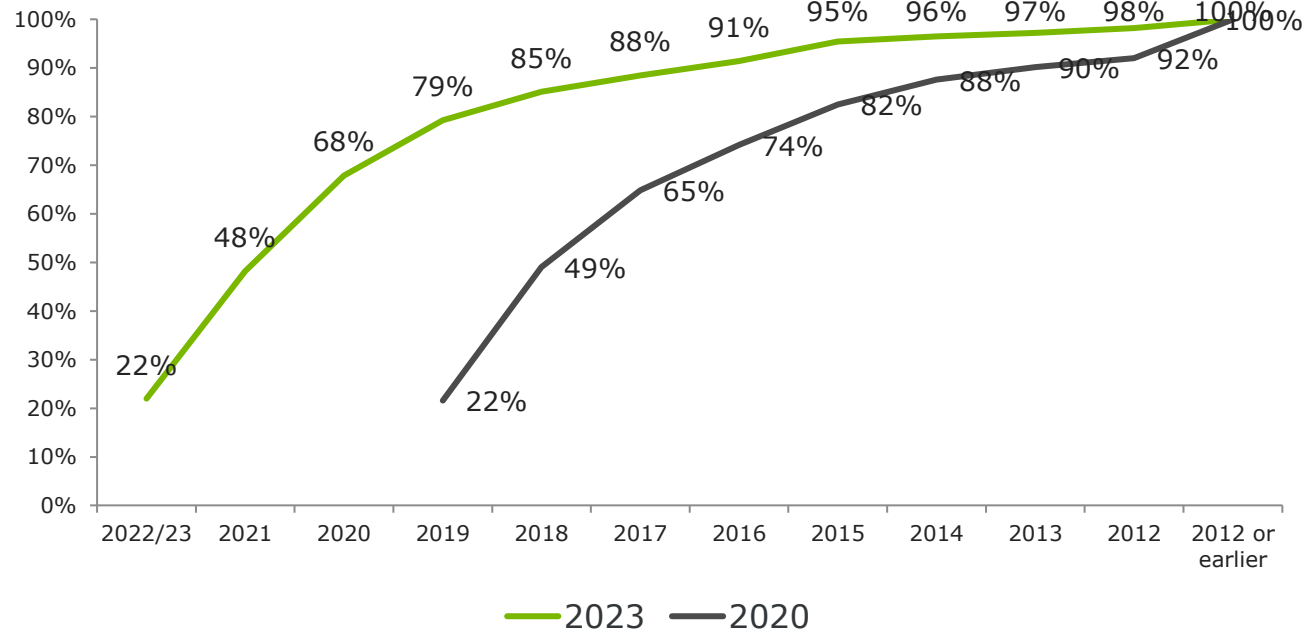
n=1311

Sums can differ from 100% due to rounding

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

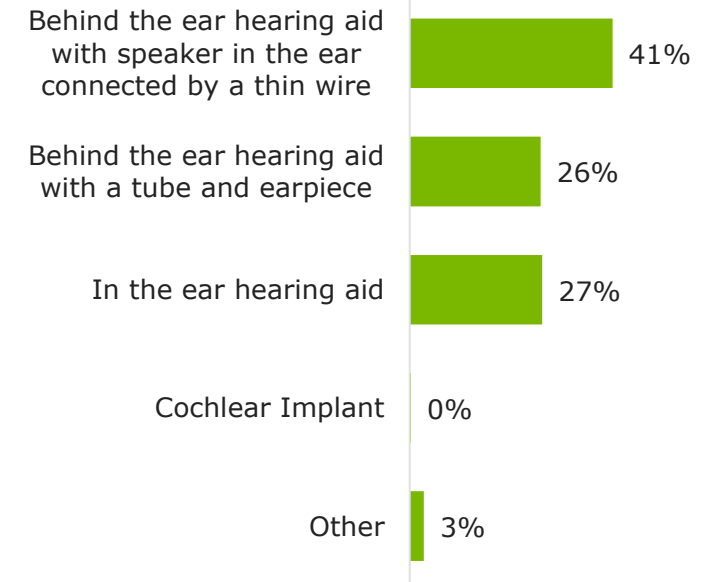
68% of the currently owned HAs were acquired in 2020 or later
 RIC is the most often purchased type of HA.

Year of purchase



Age of currently owned HAs (Mean):
 2023: 2.8 years
 2020: 3.0 years

Type of HA

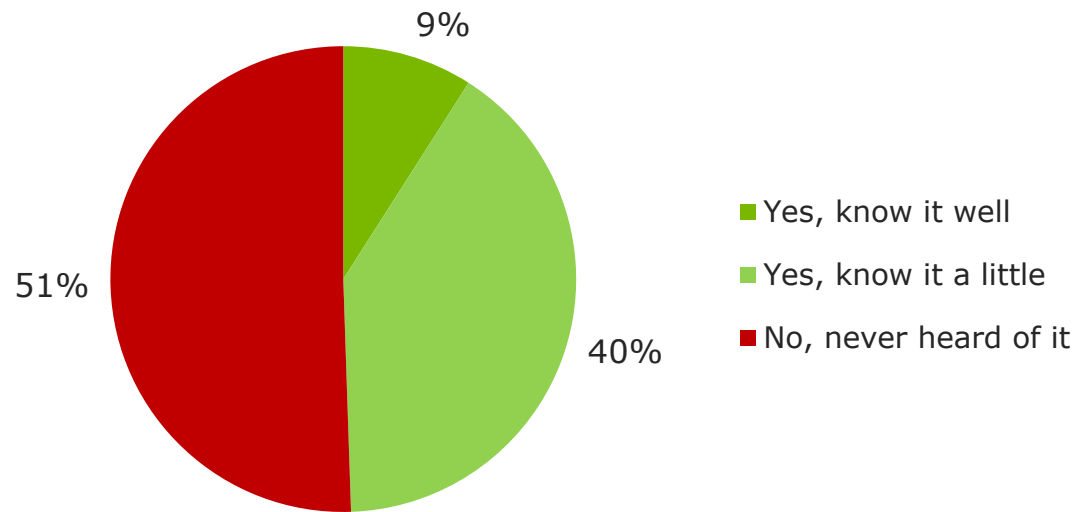


HA Owner n=507



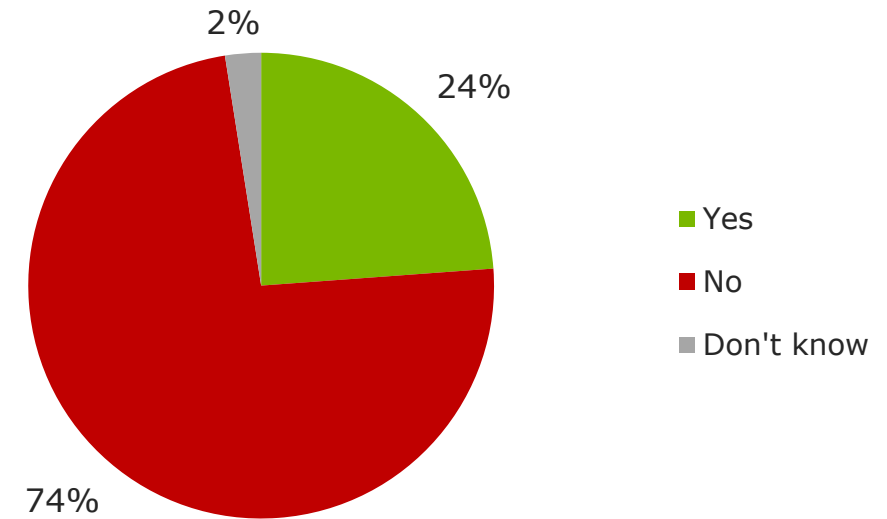
51% of the population in ESP have never heard of Cochlear Implants. 24% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.

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



n=4'012

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

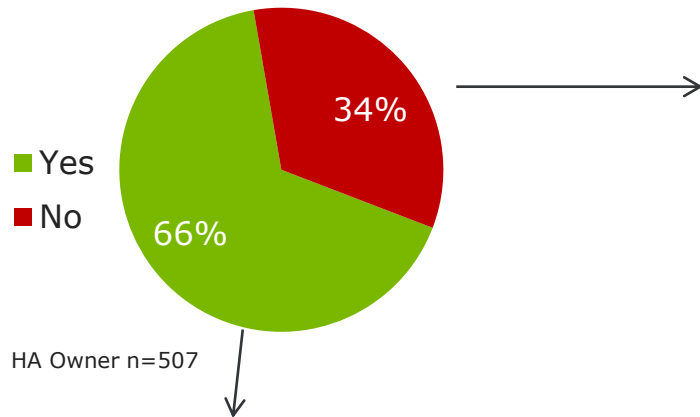


n=229 (HA Owner with severe/profound HL)

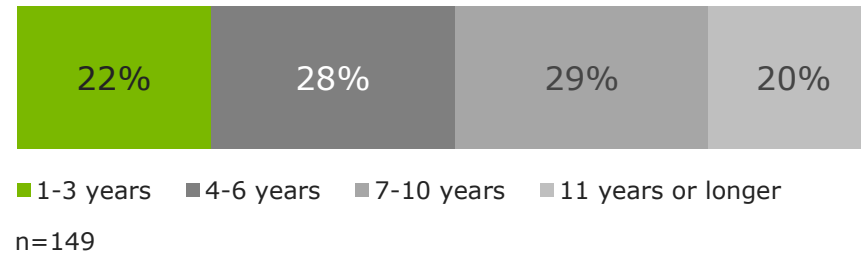


Hearing aids are used for six years before they are replaced. Mostly below three years pass between becoming aware of the hearing loss and purchasing hearing aids

Current HAs = first HAs?



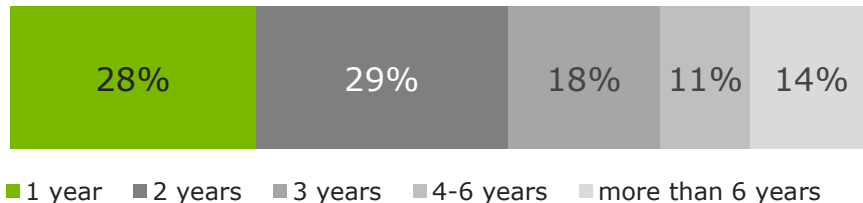
How many years did you own your previous HAs?



Age of HA before it has been replaced:
 2023: 6 years (median)
 2020: 5 years (median)

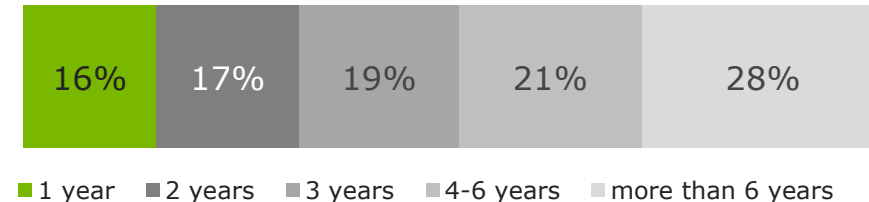
HA Owner (1st HA):

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?



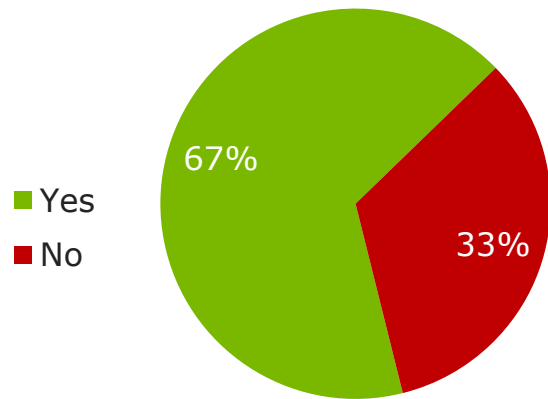
HA Non-owner:

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! The main reason is missing out on social life.

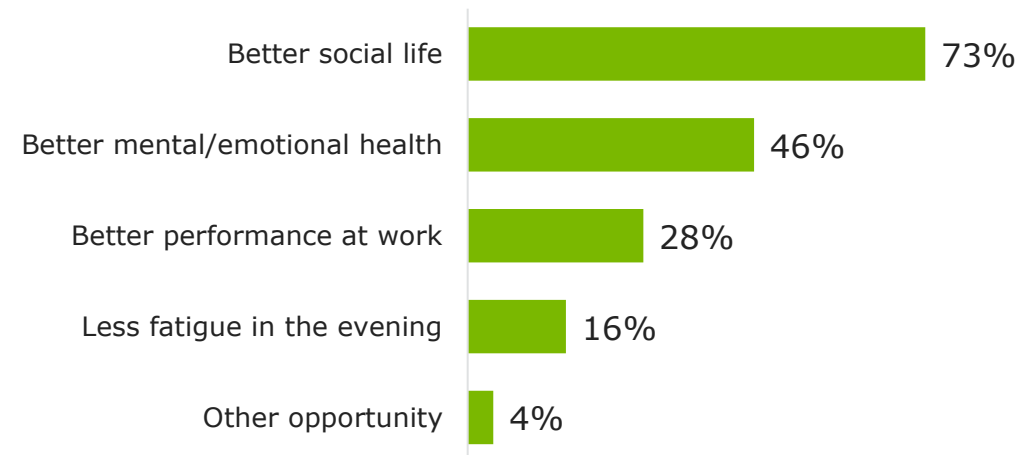
Thinking back before you obtained your first hearing aid(s): do you think, you should have gotten them sooner?



HA Owner n=507

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



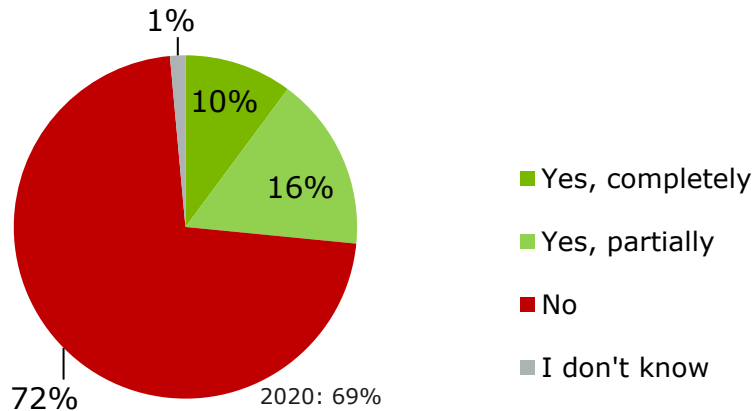
n=328



A minority received some 3rd party reimbursement.
 Only 11% of the non-owners think that insurance would pay.

HA Owner:

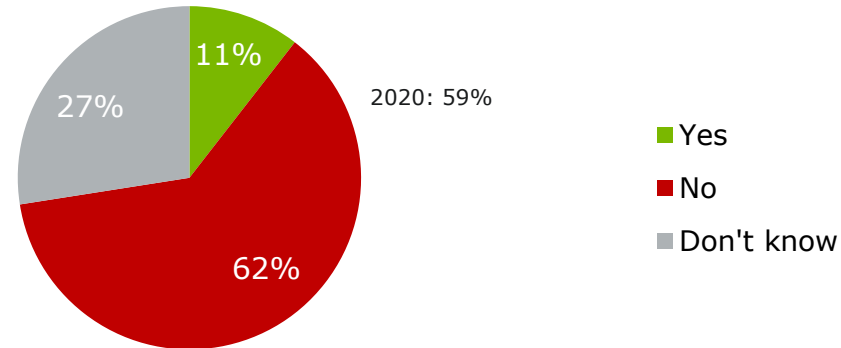
Has your hearing aid been fully or partially paid for by a third party organization (insurance, government, etc.)?



HA Owner n=507

HA Non-owner:

Based on your current knowledge, would any part or all of your hearing aid(s) be paid for by a third party? (Insurance, Government, ...)



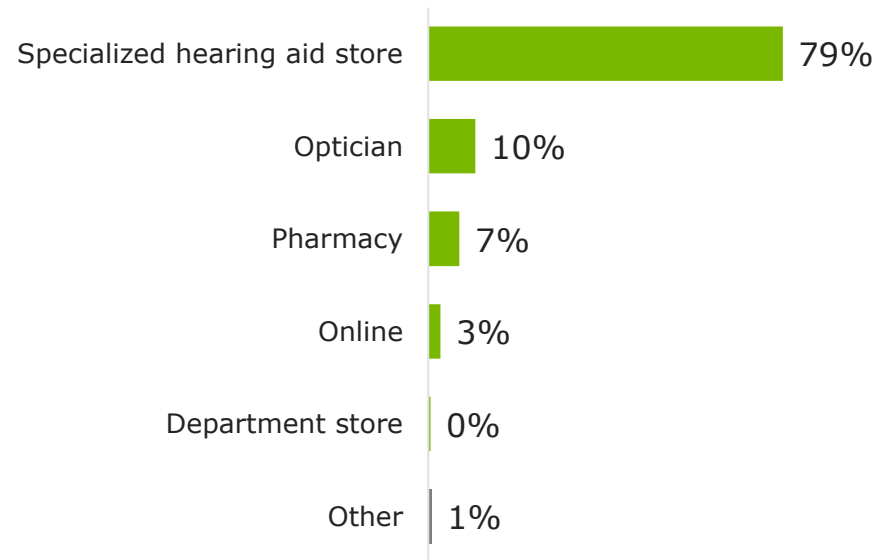
HA Non-owner n=804



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

HA Owner:

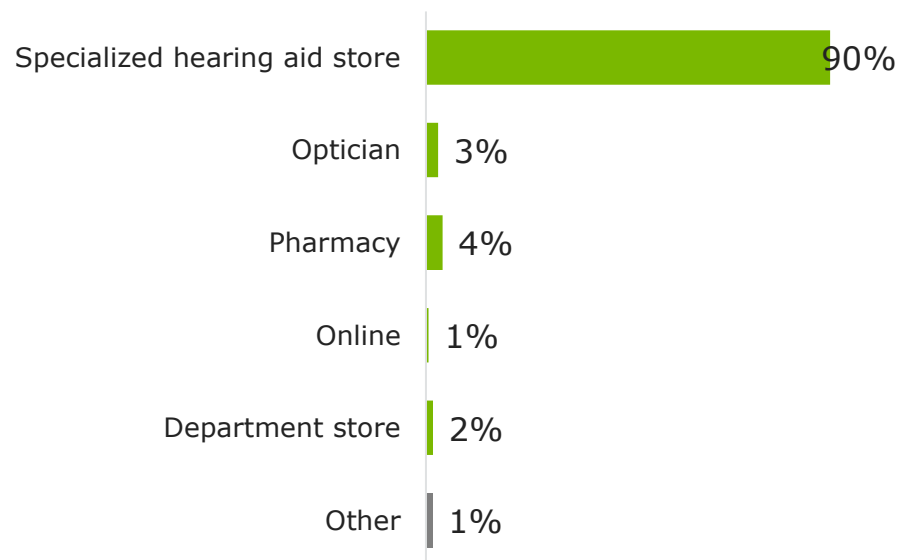
Where was your most current hearing aid obtained?



HA Owner n=507

HA Non-owner:

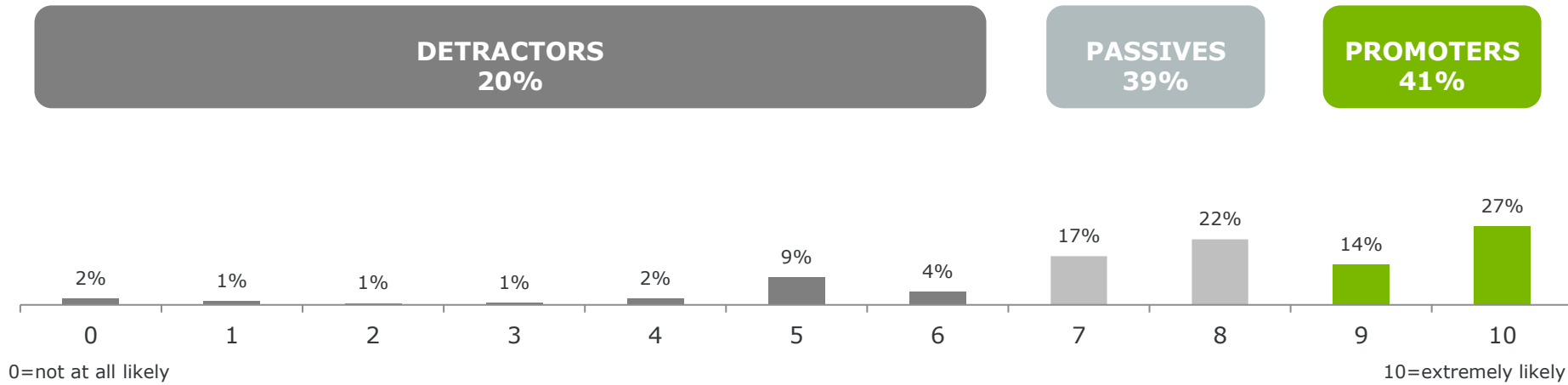
If you were to get hearing aids, where would you go?



HA Non-owner n=804

Recommendation intention of the place where the hearing aid(s) have been obtained: Positive NPS score of 20.

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



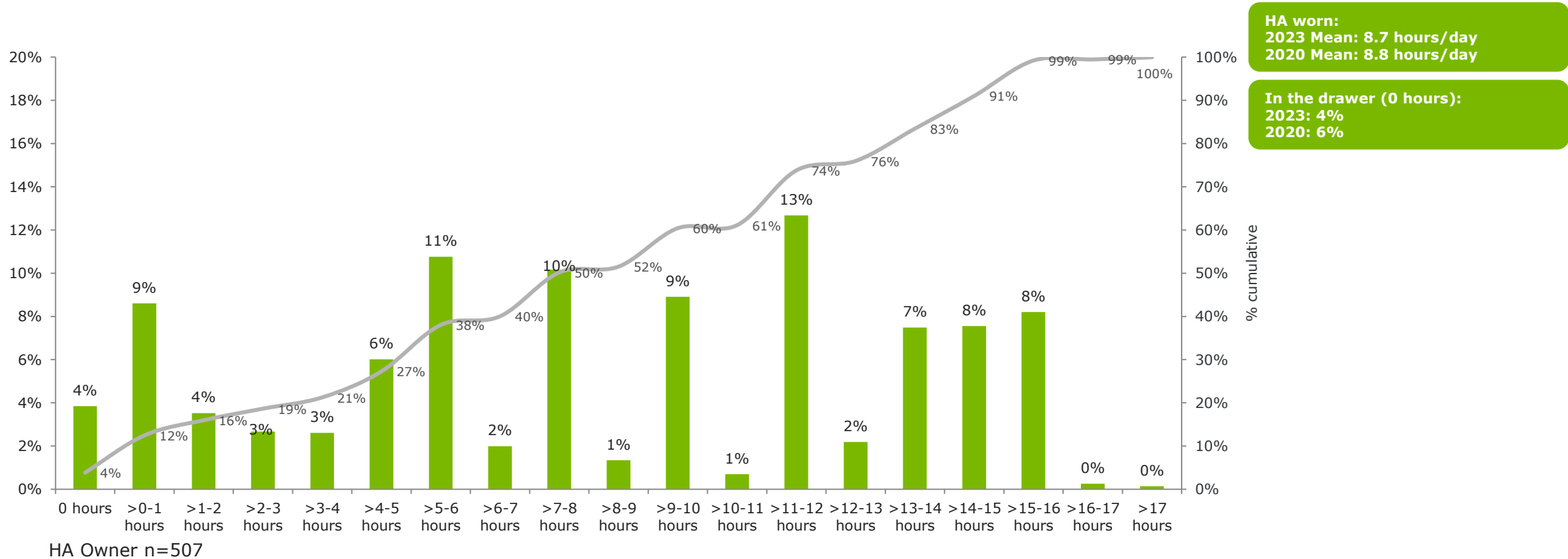
NPS = PROMOTERS – DETRACTORS = 20 (exact figure rounded) 2020: 10%

HA Owner n=507



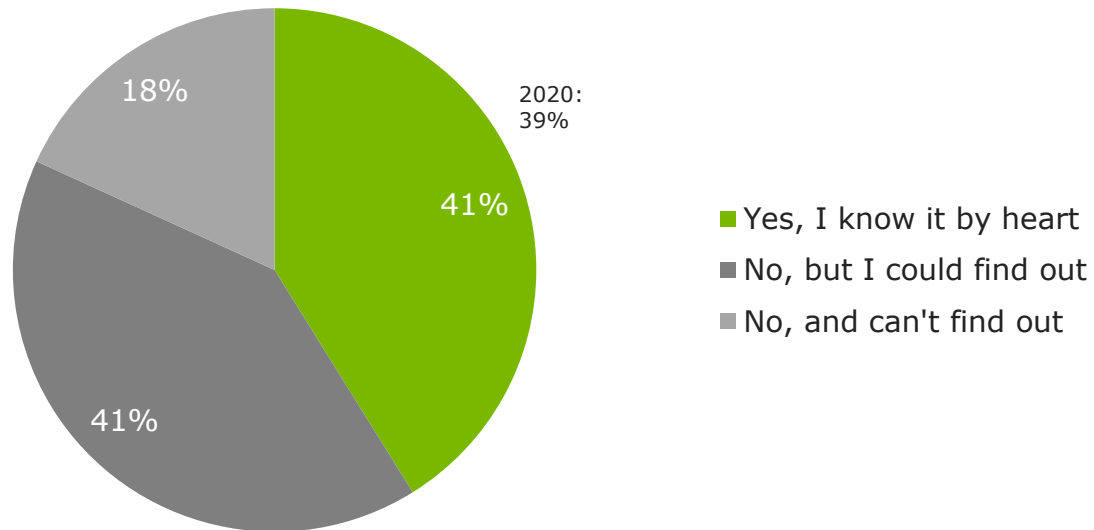
On average, HAs are worn 8.7 hours a day

How many hours a day are HA worn?



41% of today's hearing aid owners are aware of their hearing aid brand

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



HA Owner n=507

35% of the HA owners use a hearing aid app, and 69% are satisfied with it.

Have you been informed by your hearing care professional about hearing aid apps?
(HA Owner n=507)



Do you personally use apps for your hearing aids?
(HA Owner n=507)

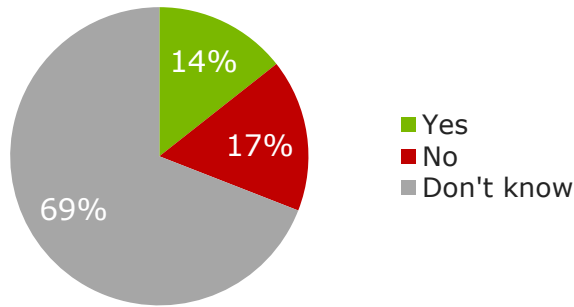


IF APPS USED (n=190):
Overall, how satisfied with the performance of your apps?



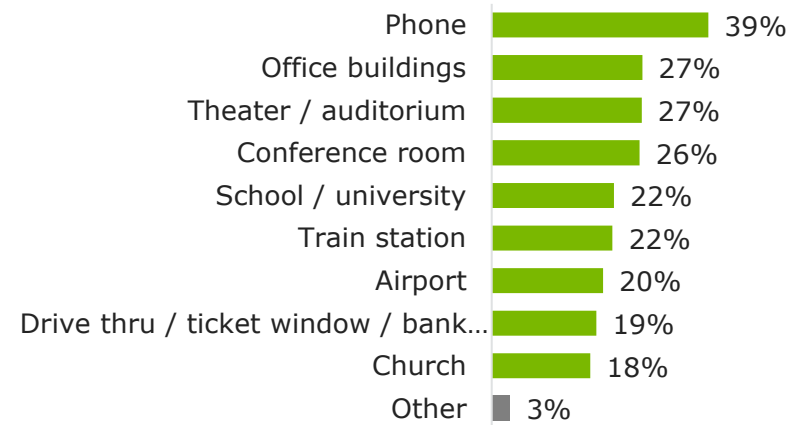
14% of the HAs are (to the knowledge of the owners) equipped with Telecoil — the main usage of Telecoil is the phone.

Are your hearing aids equipped with Telecoil?



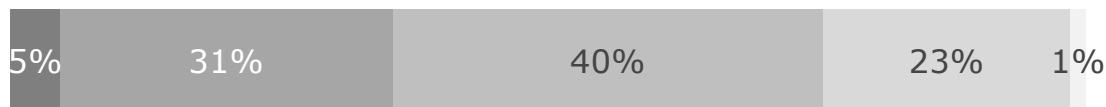
HA Owner n=507

Where do you use your telecoil to improve your hearing?



HA Owner (use Telecoil), n=70

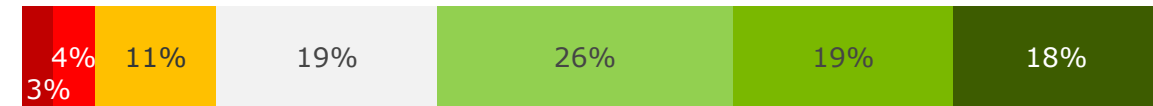
How often do you use the telecoil to improve your hearing?



■ Never ■ Rarely ■ Occasionally ■ Often ■ Very often

HA Owner (equipped with Telecoil), n=70

How satisfied are you with the telecoil option?



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

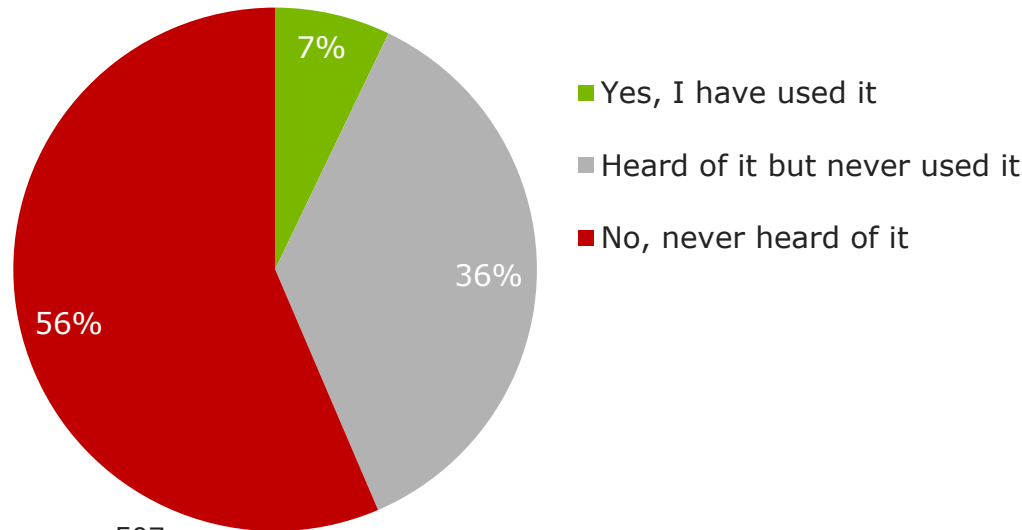
HA Owner (use Telecoil), n=66



7% of the HA owners have already used remote fitting, 36% have at least heard of it, and 56% 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)

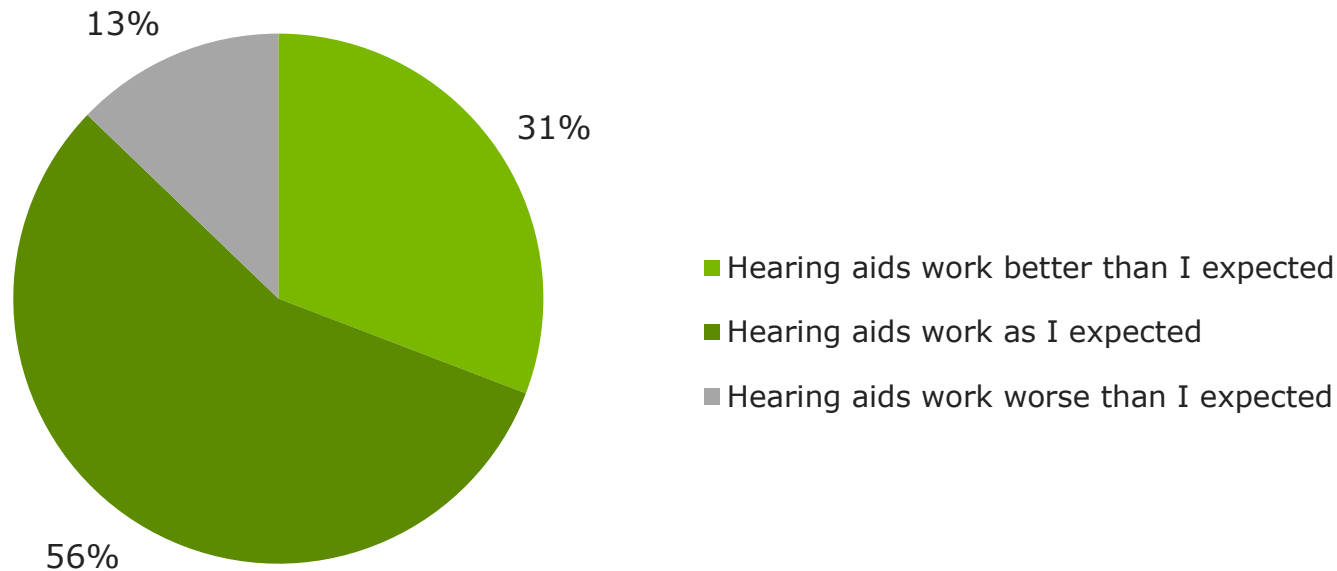


HA Owner n=507

Satisfaction with hearing aids and drivers

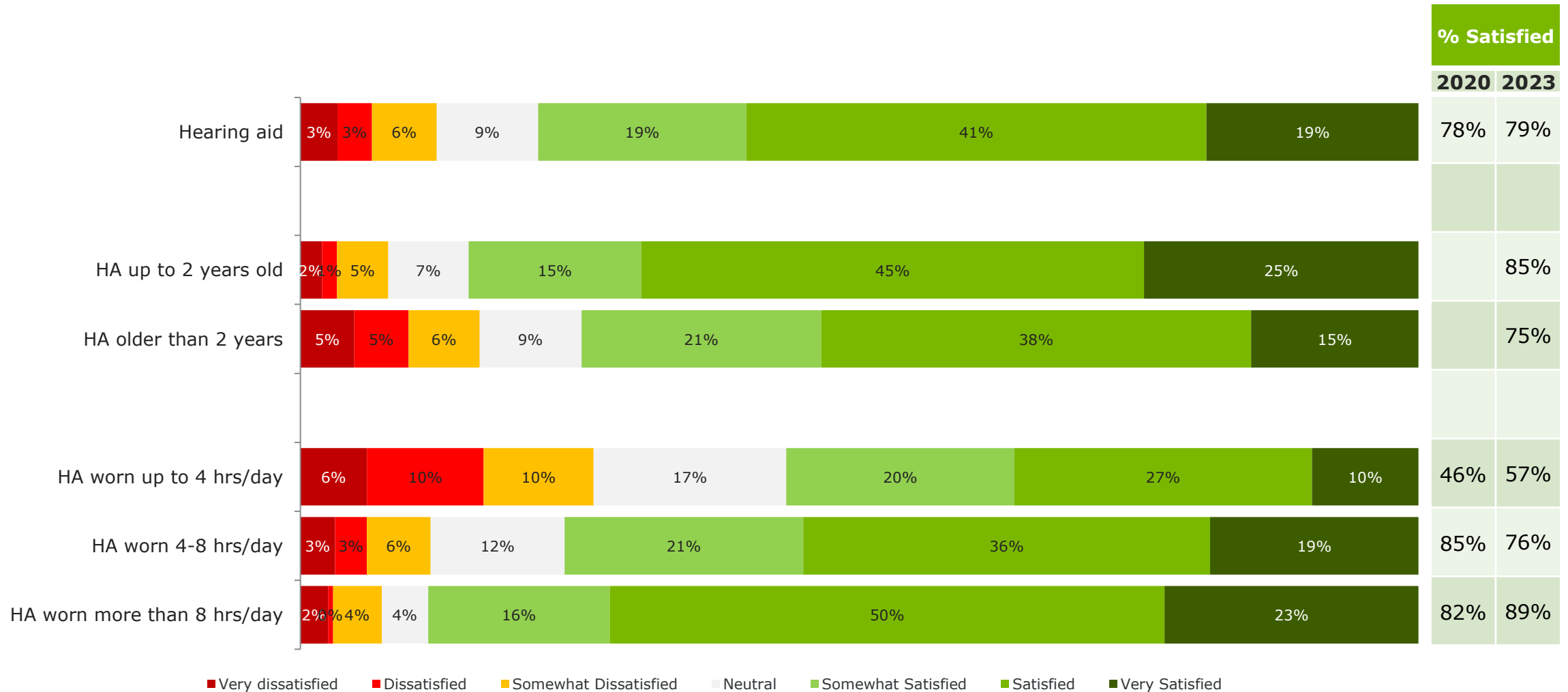
87% (2020: 82%) of hearing aid owners say their hearing aid works better than or as expected

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



n=507

Overall satisfaction with HA: 79% of hearing aid owners are satisfied with their hearing aid(s) (2020: 78%)

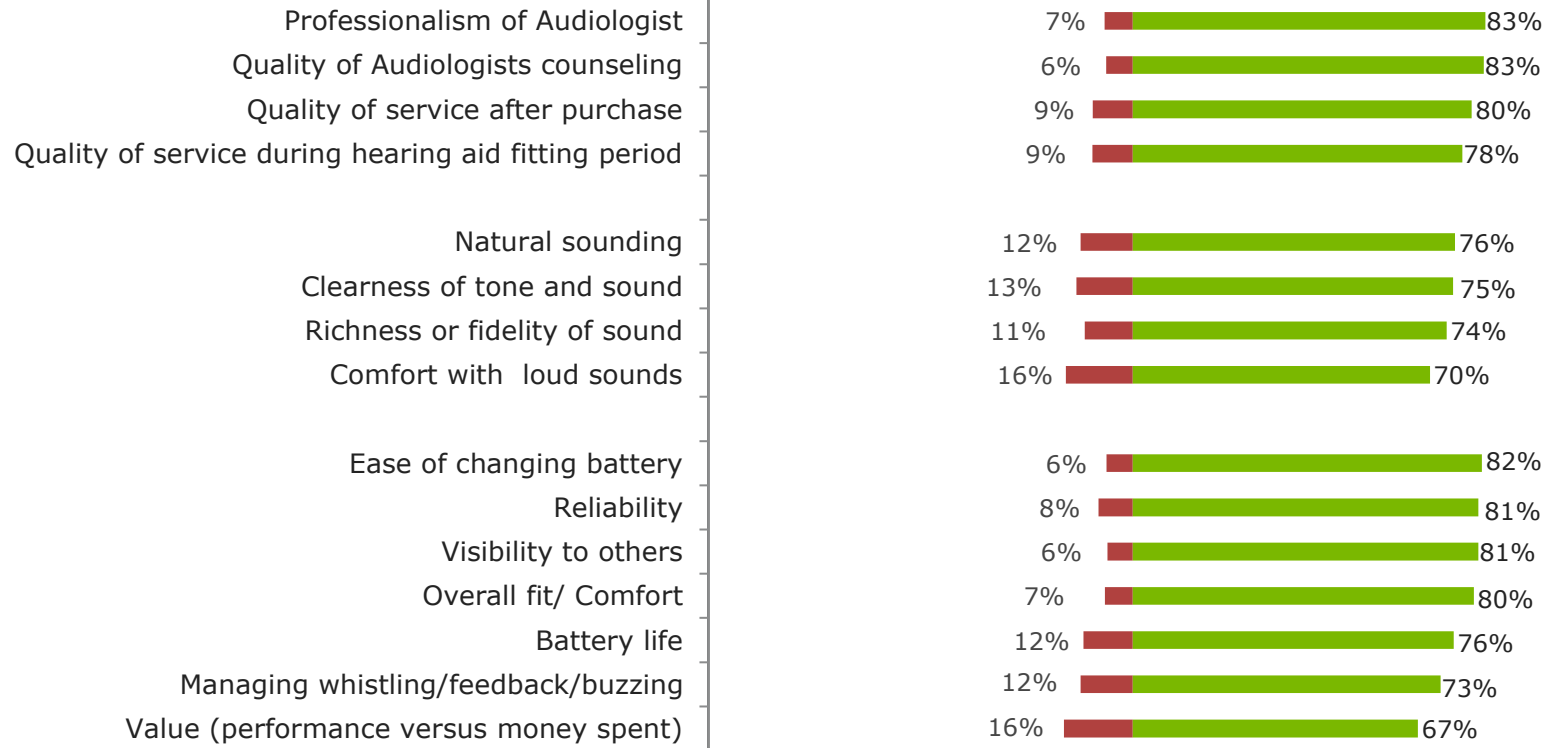


Satisfaction with current hearing aids

HA dispenser/
Audiologist

Sound quality
signal process.

Product
features



Trend*
-3%
-1%
+1%
-1%
-2%
-3%
-2%
-3%
-2%
+4%
+5%
+/-0%
+4%
+5%
+3%

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

*% of satisfied HA Owners compared to 2020

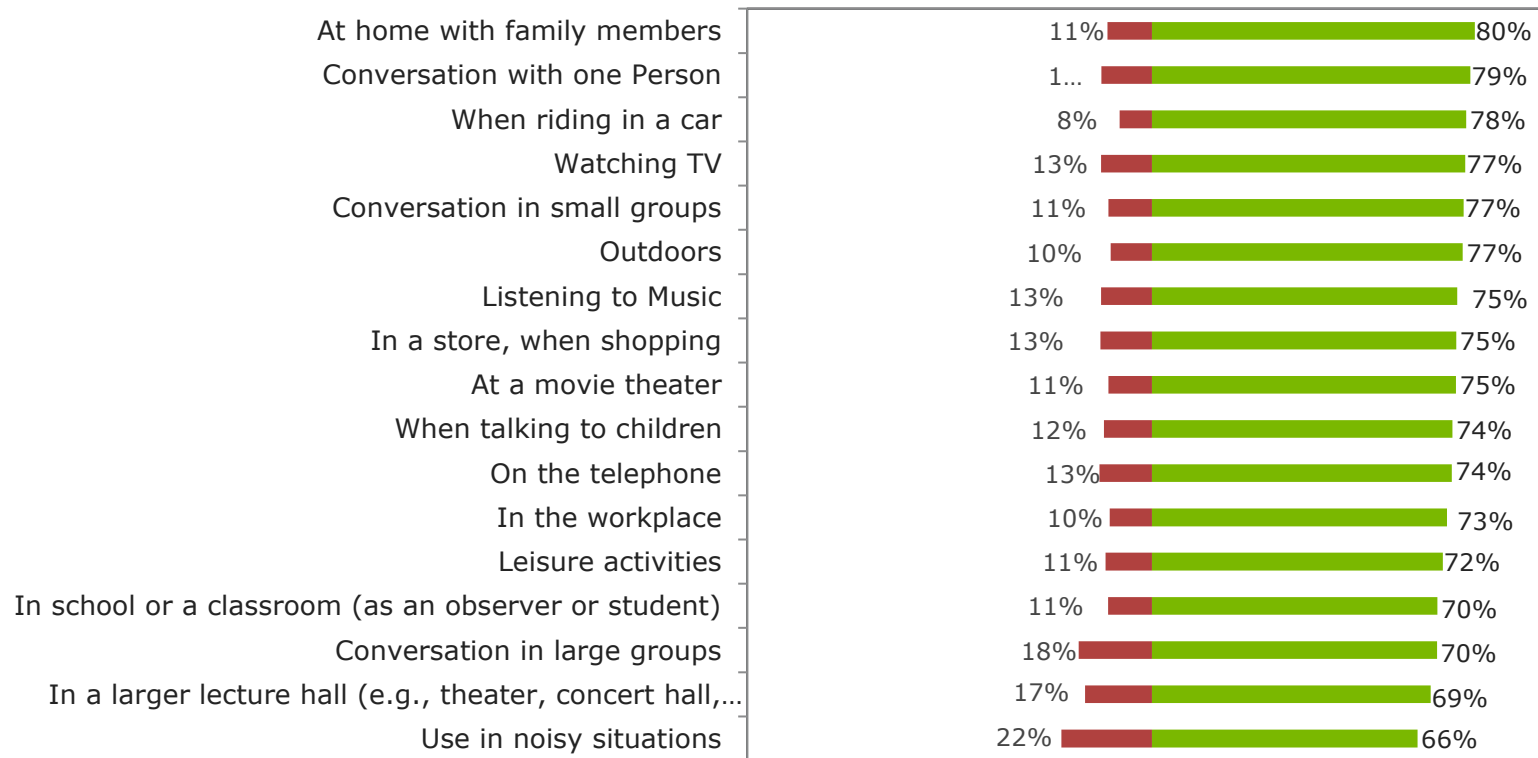
■ dissatisfied ■ satisfied

HA Owner n=507



Satisfaction with current hearing aids

Listening situations



Trend*
-1%
-2%
+5%
-1%
-2%
-1%
-1%
-3%
+2%
-4%
+1%
+2%
-3%
-1%
-2%
-4%
-1%

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

*% of satisfied HA Owners compared to 2020

■ dissatisfied ■ satisfied

HA Owner n=507



Factors influencing satisfaction with current HA: Reliability is most important for overall satisfaction with HA

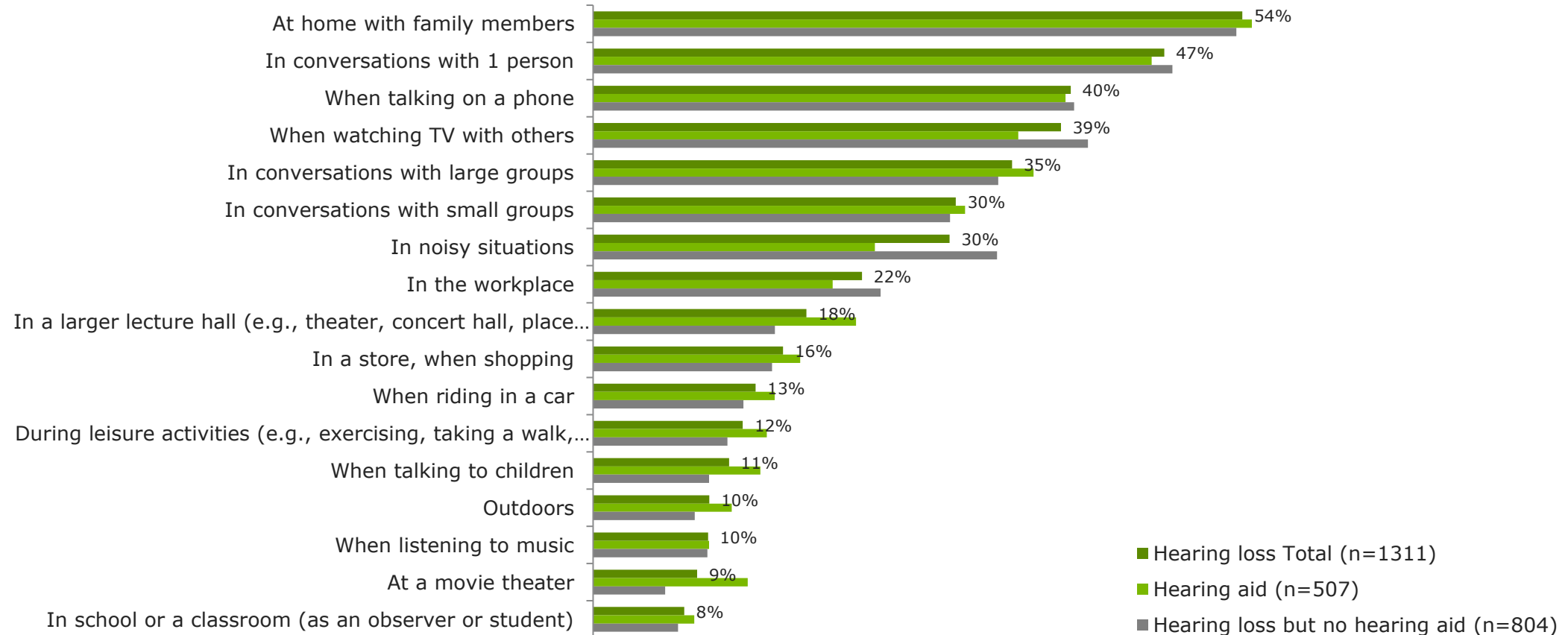
Influence on overall satisfaction with HA*

HA dispenser / Audiologist	Quality of service during hearing aid fitting period	0.61
	Quality of service after purchase	0.61
	Professionalism of Hearing aid dispenser / Audiologist	0.59
	Quality of HA dispensers / Audiologists counseling	0.56
Sound quality signal processing	Clearness of tone and sound	0.69
	Richness or fidelity of sound	0.64
	Natural sounding	0.63
	Comfort with loud sounds	0.60
Product features	Reliability	0.76
	Overall fit/ Comfort	0.66
	Managing whistling/feedback/buzzing	0.59
	Value (performance versus money spent)	0.58
	Visibility to others	0.54
	Ease of changing battery	0.49
	Battery life	0.46

*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

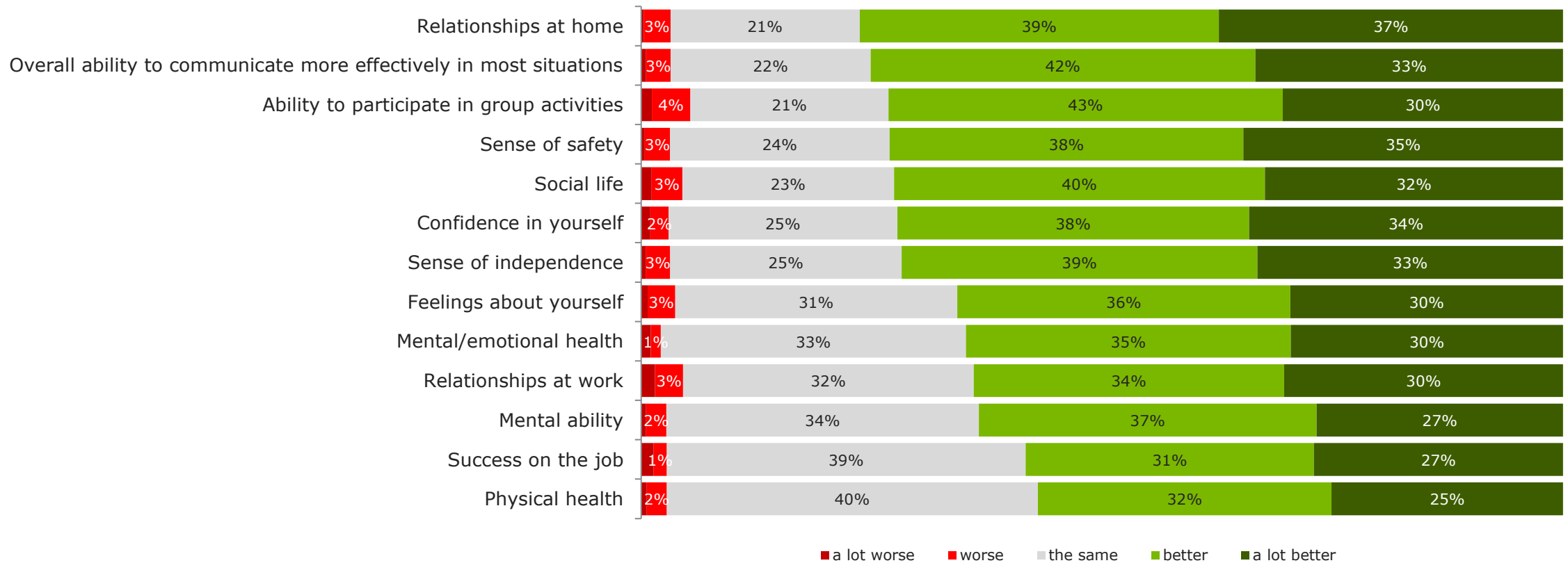
In which of these situations is it most important for you to hear well? (choose up to 5)



Positive impact of hearing aids, quality of life

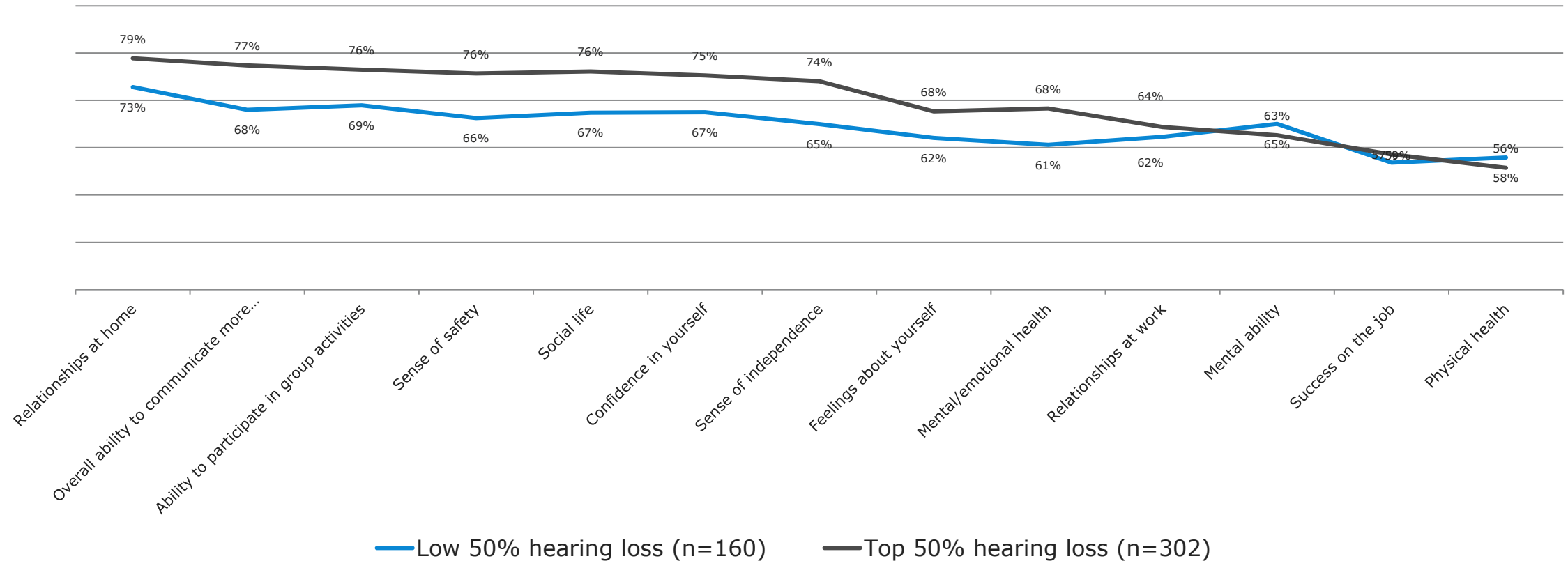
The significant positive impact of HAs on different aspects: Especially Relationships at home, the ability to communicate, participate in group activities, sense of safety, social life, self-confidence, and sense of independence improved

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).



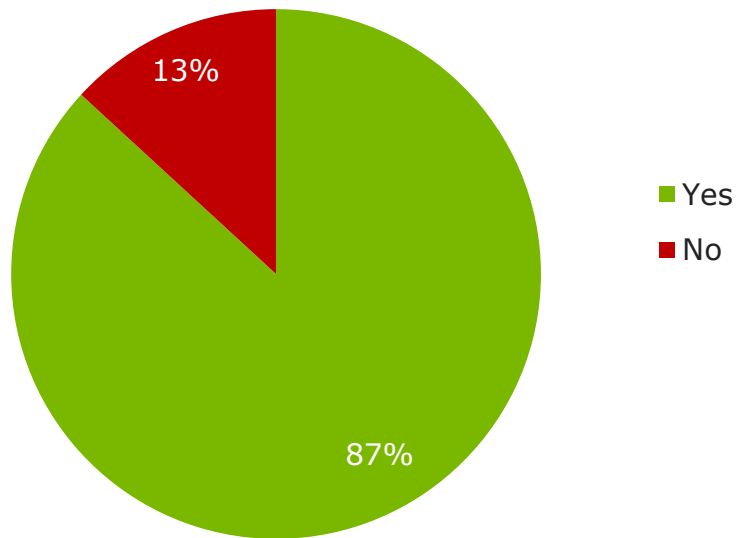
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

% of HA Owners feeling better/a lot better



87% of hearing aid owners feel more confident moving in a city since wearing hearing aids.

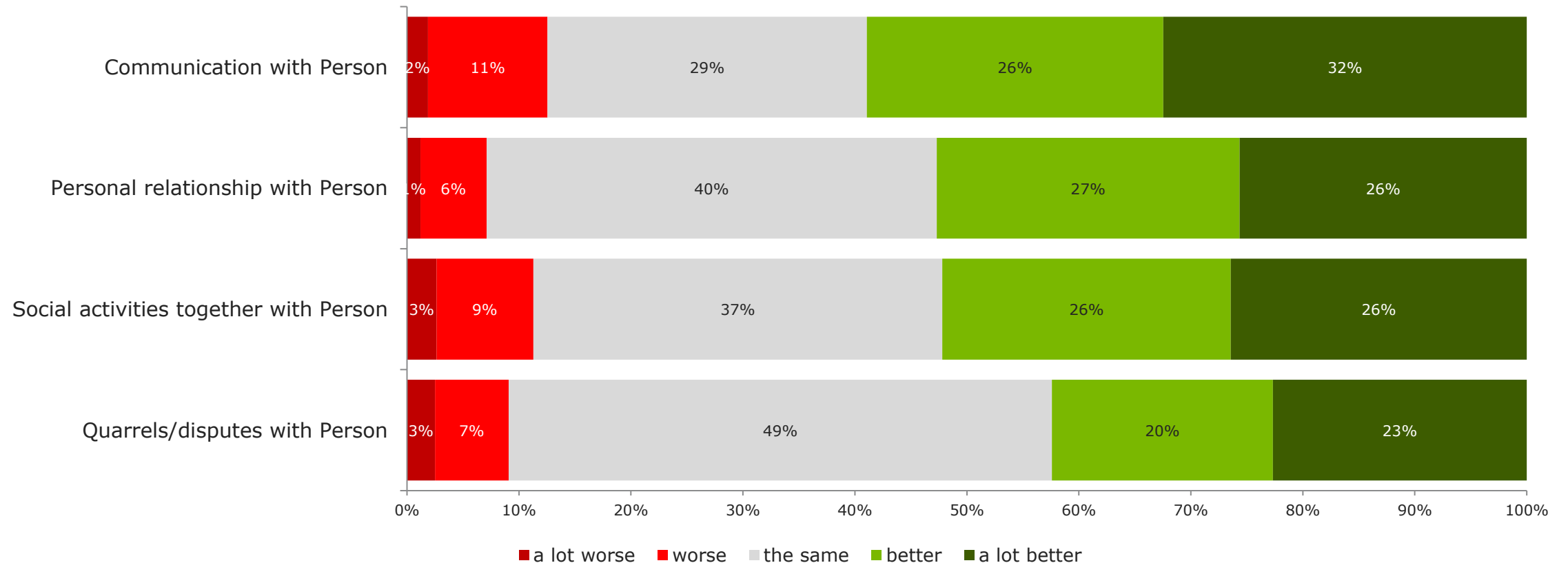
Since wearing a hearing aid, do you feel more confident moving in a city, e.g. because you hear traffic signals/vehicles approaching?



n=507

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?

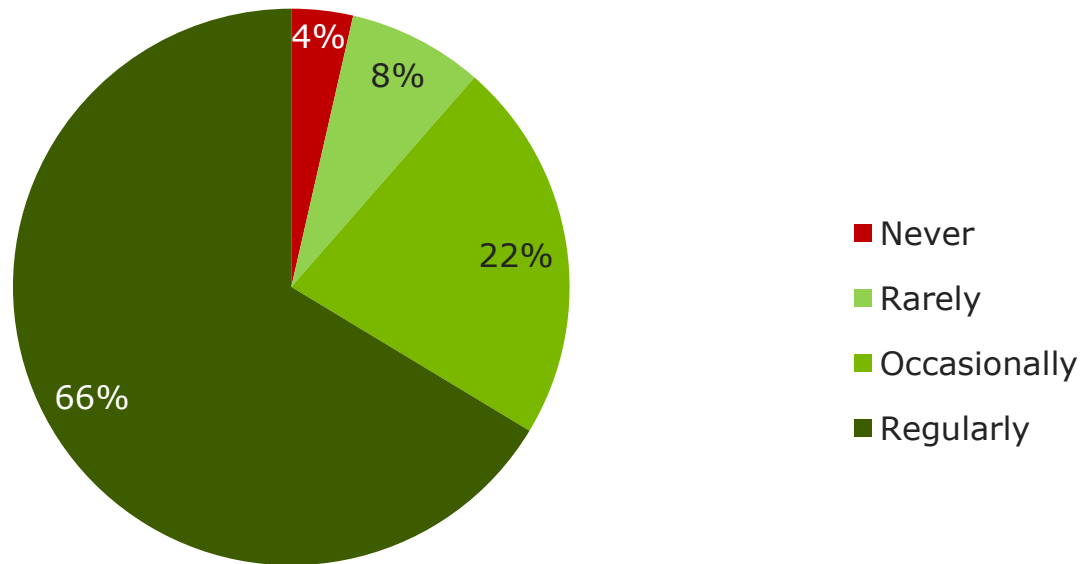


Someone in HH / parent has HA, n=600



96% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

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



n=507

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

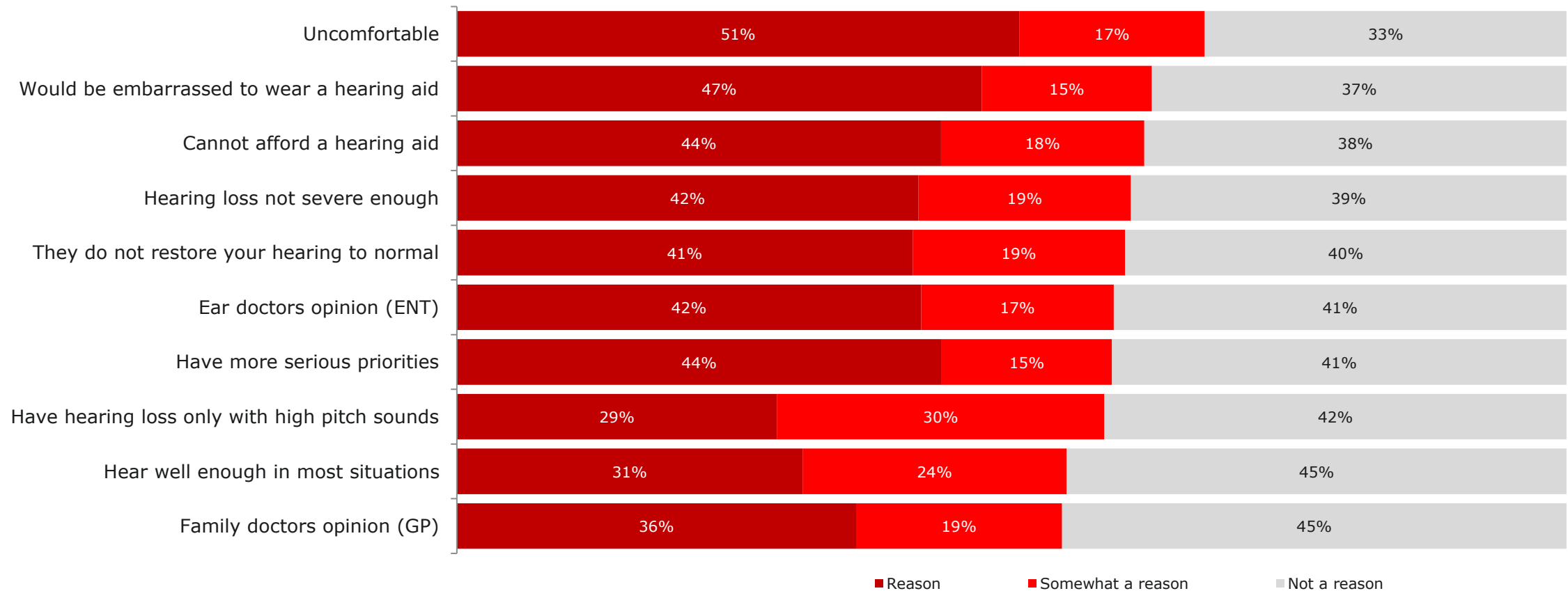
Hearing loss characteristics: Owners compared to Non-owners

	HA Owner n=507	HA Non-owner low 50% HL n=454	HA Non-owner Top 50% HL n=227
Ears impaired (stated)			
Unilateral loss	30%	53%	31%
Bilateral loss	70%	47%	69%
Perceived loss			
Mild	9%	58%	6%
Moderate	44%	39%	57%
Severe	38%	3%	33%
Profound	9%	0%	4%

More similar hearing loss-structure



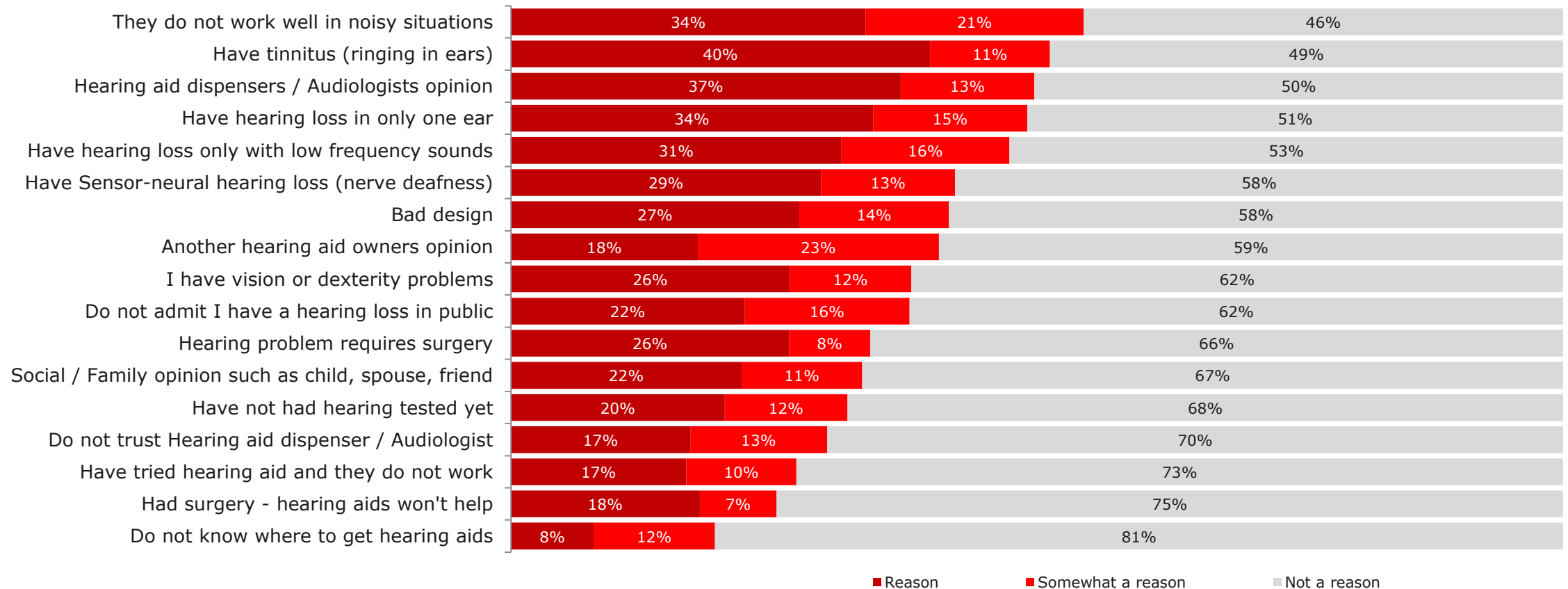
Top 10 reasons for not having a hearing aid



Non-Owner Top 50% hearing loss n=227



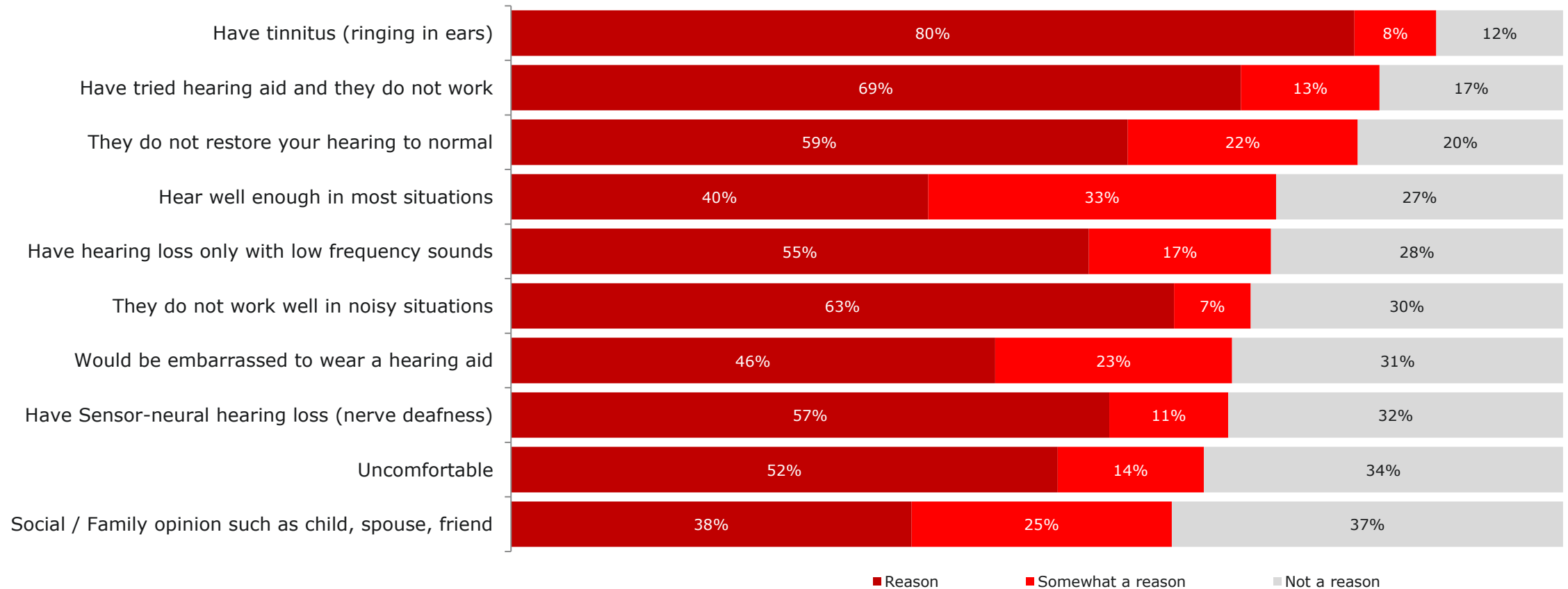
Less important reasons for not having a hearing aid



HA Non-owner Top 50% hearing loss n=227



Top 10 reasons for HA owners NOT using them



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

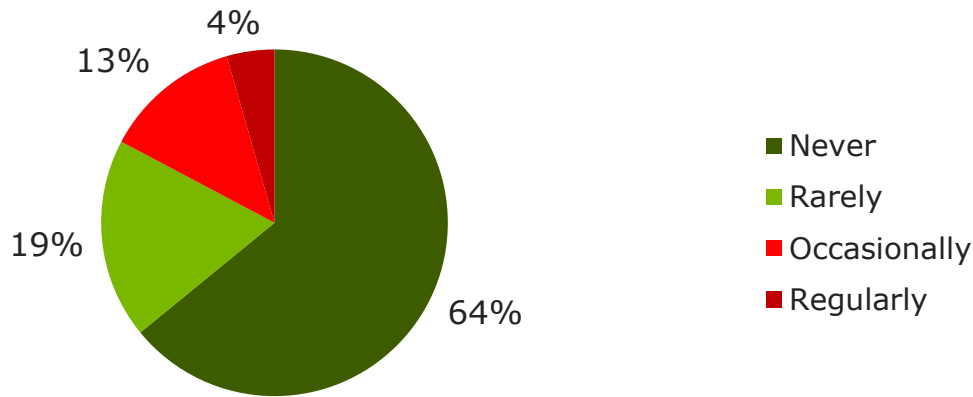


Social rejection because of hearing loss compared to the acceptance of hearing aids

64% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. Somebody is more likely to make fun of or deny a hearing impaired without hearing aids.

HA Owner:

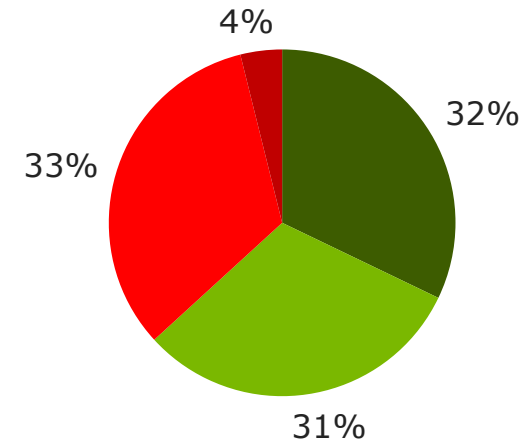
How often do you feel you are made fun of or rejected because you are wearing a hearing aid?



HA Owner n=507

HA Non-owner:

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



HA Non-owner Top 50% hearing loss n=227

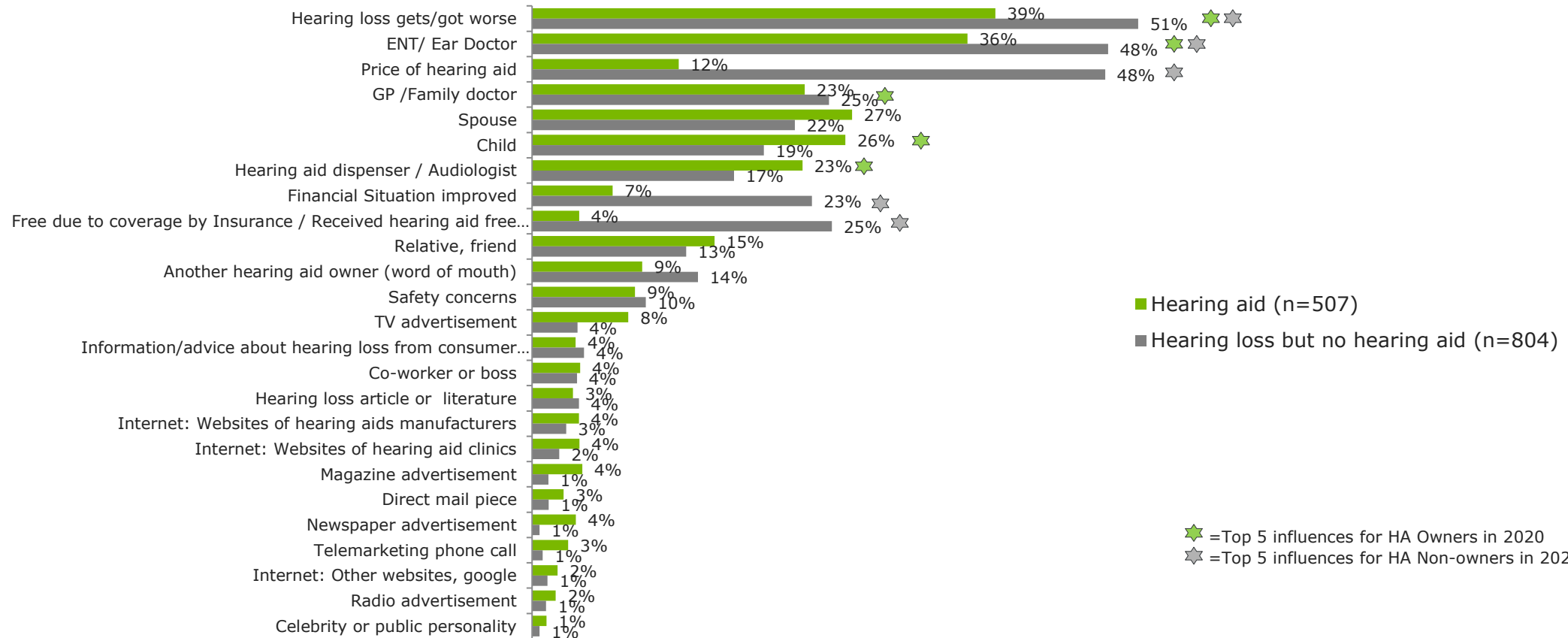


Most important triggers to buy

The most important influencing factors for HA owners were worsening hearing loss, ENT, GP, spouse child, and an audiologist. For the non-owners, financial aspects play a crucial role (price, insurance coverage, financial situation)

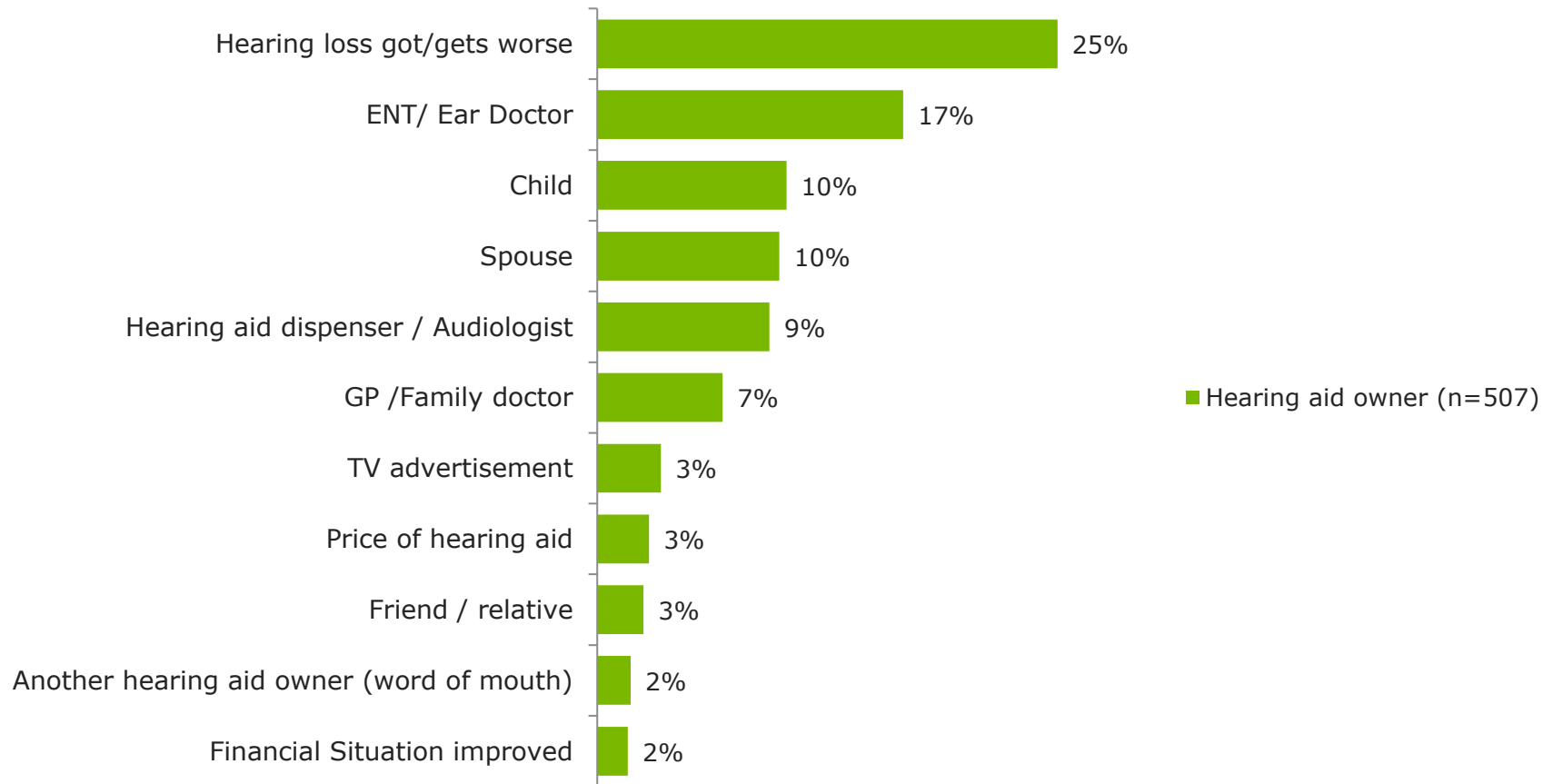
HA Owner: Thinking back to when you obtained your first hearing aid(s), what influenced you to obtain /purchase the hearing aid(s)?

HA 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, child, spouse and Audiologist

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





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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 (HA Non-owner)	Hearing aids (HA Owner)
Gender						
Male	7'511	11.4%	36.6%	48.4%	54.2%	49.3%
Female	7'876	9.9%	41.3%	51.6%	45.8%	50.7%
Age						
1 - 14	2'110	2.0%	73.4%	15.0%	1.1%	4.9%
15 - 24	1'566	2.6%	51.1%	11.1%	2.0%	3.3%
25 - 34	1'587	4.1%	42.6%	11.1%	3.7%	4.4%
35 - 44	2'191	6.2%	42.4%	14.9%	7.9%	9.1%
45 - 54	2'656	8.5%	25.7%	17.7%	16.7%	9.1%
55 - 64	2'176	13.2%	27.8%	13.7%	20.8%	12.6%
65 - 74	1'567	18.2%	41.6%	9.3%	16.7%	18.8%
74+	1'535	35.8%	43.6%	7.2%	31.0%	37.9%
Type of household						
single household	1'198	19.4%	40.7%	7.0%	13.8%	15.0%
Couple, no kids	3'563	14.4%	38.7%	22.2%	31.5%	31.5%
Couple with kid(s)	7'537	7.0%	39.2%	51.0%	32.2%	32.8%
Single mom/dad with kid(s)	1'205	9.4%	34.2%	7.9%	7.5%	6.1%
Retirement home, hospital etc.	217	29.0%	67.7%	1.1%	2.0%	6.7%
Other	1'651	10.8%	27.8%	10.7%	12.9%	7.8%

Demographics (2) 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 (HA Non-owner)	Hearing aids (HA Owner)
Status						
The head of the household (alone or together with someone)	7'505	15.4%	37.0%	46.1%	73.1%	67.7%
The spouse of the head of the household	2'877	9.4%	48.3%	19.0%	14.0%	20.6%
Daughter/son of head of household	3'988	1.9%	38.9%	28.5%	4.7%	4.7%
Other person	1'016	12.4%	35.2%	6.5%	8.2%	7.0%
Employment						
Full time employed	5'772	8.5%	32.3%	45.9%	33.6%	26.4%
Part time employed	1'107	7.0%	34.3%	8.9%	5.2%	4.5%
Unemployed / not working	1'716	8.2%	33.5%	13.7%	9.5%	7.8%
Retired under a disability pension scheme (fully or partly)	322	14.1%	44.1%	2.4%	2.6%	3.4%
Early retired under an early retirement benefit scheme	309	19.2%	38.9%	2.2%	3.7%	3.9%
Retired (at the official retirement age)	2'807	26.8%	42.1%	17.9%	44.2%	52.9%
Student / pupil / in training	1'054	1.9%	37.5%	9.0%	1.3%	1.2%
Education						
Estudios Primarios	1'822	24.2%	41.1%	12.0%	26.4%	30.3%
Estudios Secundarios	1'929	12.6%	34.3%	14.6%	16.3%	14.0%
Bachillerato / Ciclos Formativos de Grado Medio	3'592	9.8%	36.3%	28.2%	22.9%	21.4%
Universitarios (Grado de 4 años) / Ciclos Formativos de Grado Superior	3'563	9.3%	36.4%	28.1%	21.4%	20.1%
Universitarios (Post Grado / Master / Doctorado)	1'941	9.1%	42.3%	15.3%	10.4%	12.5%
Otros	241	15.3%	28.1%	1.8%	2.7%	1.7%

Sample size and random sample error: Rules of thumb

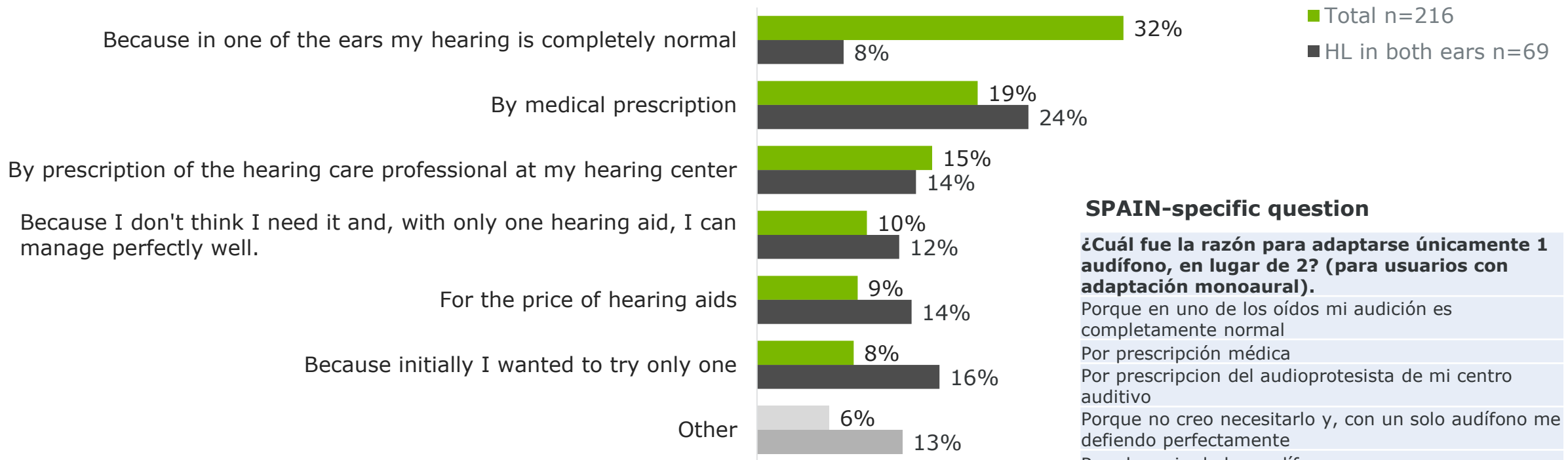
READ: At a sample size of $n=500$ and a value of 15% we would expect the real value in an interval ± 3.1 around 15% - which means between 11.9% and 18.1% (Conservative assumption: 95% confidence level)

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

- **SPAIN-specific question**

Reasons for only one hearing aid

IF hearing aids in one ear only:
What was the reason for only fitting 1 hearing aid instead of 2?



n=221

SPAIN-specific question

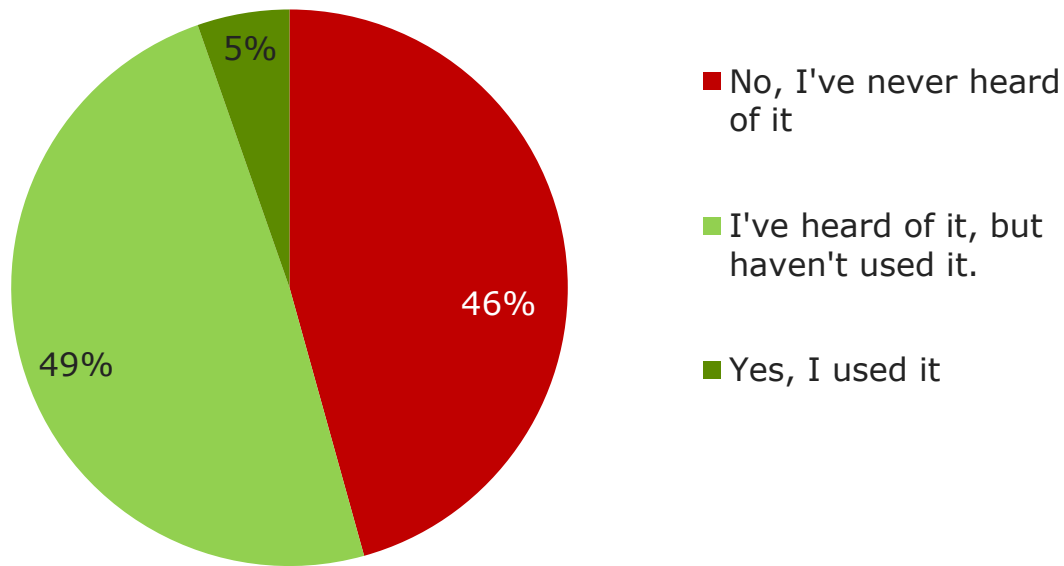
¿Cuál fue la razón para adaptarse únicamente 1 audífono, en lugar de 2? (para usuarios con adaptación monoaural).

- Porque en uno de los oídos mi audición es completamente normal
- Por prescripción médica
- Por prescripción del audioprotesista de mi centro auditivo
- Porque no creo necesitarlo y, con un solo audífono me defiendo perfectamente
- Por el precio de los audífonos
- Porque inicialmente quería probar con uno
- Otra



Awareness of amplifiers (asked to all with stated hearing loss)

Have you ever heard of hearing amplifiers? (Hearing amplifiers: devices that can be purchased outside a hearing aid store, and that allow you to amplify sound, but are not fitted by a hearing care professional)?



n=1311

SPAIN-specific question

¿Alguna vez ha oído hablar de los amplificadores auditivos? (Amplificadores auditivos: dispositivos que pueden adquirirse fuera de un establecimiento de audífonos, y que le permiten amplificar el sonido, pero que no son adaptados por un profesional audioprotesista). (para usuarios y no usuarios)

No, no he oído hablar nunca de ello

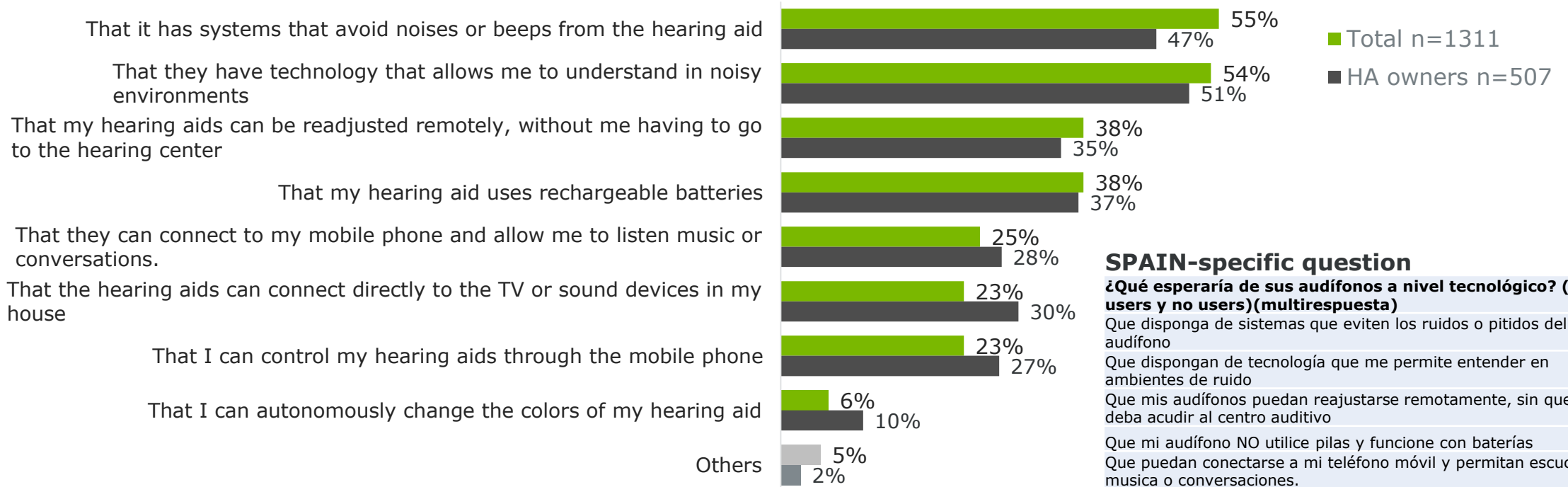
Lo he escuchado, pero no lo he utilizado

Sí, lo he utilizado



Technological expectations

What would you expect from your hearing aids at the technological level?



SPAIN-specific question

¿Qué esperaría de sus audífonos a nivel tecnológico? (para users y no users)(multirespuesta)

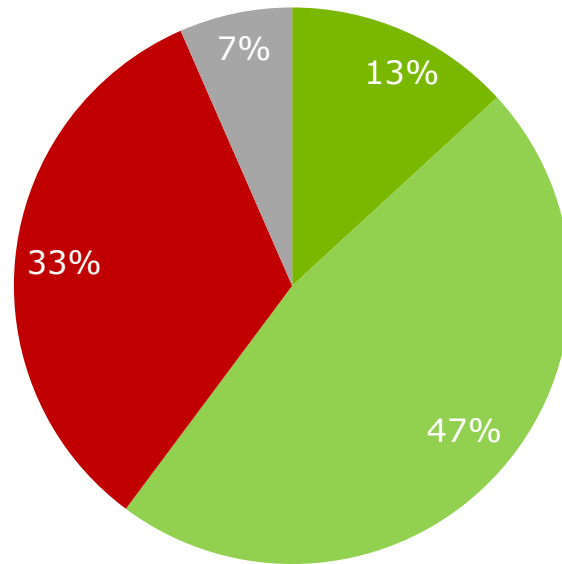
- Que disponga de sistemas que eviten los ruidos o pitidos del audífono
- Que dispongan de tecnología que me permite entender en ambientes de ruido
- Que mis audífonos puedan reajustarse remotamente, sin que yo deba acudir al centro auditivo
- Que mi audífono NO utilice pilas y funcione con baterías
- Que puedan conectarse a mi teléfono móvil y permitan escuchar musica o conversaciones.
- Que los audífonos puedan conectarse directamente a la TV o dispositivos de sonido de mi casa
- Que pueda controlar mis audífonos a través del teléfono movil
- Que pueda cabiar autónomamente los colores de mi audífono
- Otros

n=1311



Financing by the health administrations

In Spain, hearing aids are financed by the health administrations (through the autonomous communities) for people up to 26 years of age. Have you been able to access public aid for the fitting of your hearing aids?



- Yes, the aid fully covered the cost of the hearing aids
- Yes, the aid partially covered the cost of the hearing aids, and I added the remaining part.
- No, I have not been able to access these aids
- I didn't know that these public aids existed for the acquisition of hearing aids

n=32 (HA Owners <30 years old)

SPAIN-specific question

En españa los audífonos estan financiados por las administraciones sanitarias (a través de las comunidades autónomas) para personas hasta los 26 años de edad. ¿Has podido acceder a una ayuda pública para la adaptación de tus audífonos? (para usuarios y no usuarios)

- Si, la ayuda cubrió totalmente el coste de ls audífonos
- Si, la ayuda cubrió parcialmente el coste de los audífonos, y yo añadí la parte restante.
- No, No he podico acceder a estas ayudas
- No sabía que existían estas ayudas públicas para la adquisición de audífonos

