Results

EuroTrak Germany 2018

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

1. Introduction

• EuroTrak Germany 2018 was designed and executed by Anovum (Zurich) on behalf of the European Hearing Instrument Manufacturers Association (EHIMA).

• Sample sizes Germany 2018:
  - Representative sample (sample 1): n=13’583 people
  - Hearing impaired (sample 2): n=1’302 people
    • Hearing impaired non-owners: n= 766 people with hearing loss (HL)
    • HA owners: n= 536 people with hearing aid (HA)

• EuroTrak UK 2018 is part of the EuroTrak studies:
Summary
2. Market overview

- **Stated hearing loss prevalence**
  - Total: 12.2%, 18+: 14.1% (2015: 12.1%, 18+: 13.9%).
  - Binaural hearing loss: HA owners: 83%, HA non-owners: 59%.
  - Hearing Tests: 45% (2015: 45%) had a hearing test in the last 5 years, most tests done by ENTs.

- **Hearing aid adoption rate (HA penetration)**
  - Total: 36.9% (2015: 34.9%).
  - Total age group 18+: 37.6% (2015: 35.0%).
  - 71% of HA owners have binaural treatment.

- **The route to the hearing aid**
  - 82% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 55% got hearing aids recommended from the ENT or family doctor (drop out rate=33% / 2015: 36%).
  - 67% of the GP consultations referred to an ENT. 10% (2015: 12%) recommended no action.
  - 36% of ENT consultations referred to a audiologist, 33% (2015: 39%) 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.
Summary
3. Analysis of hearing aid owners

• Hearing aid ownership and usage, accessories and Telecoil
  – 94% (2015: 92%) of all HA owners asked some kind of 3rd party reimbursement.
  – 66% of the currently owned HAs were bought 2015 or later.
  – The average age of the currently owned HAs is 2.9 years (2015: 2.9 years).
  – The median age of hearing aids before replacement is 6 years.
  – On average, HAs are worn 9.0 hours a day (2015: 8.7).
  – 39% of today’s hearing aid owners are aware of their hearing aid brand.
  – 46% have been informed about hearing aid accessories by the HCP, 15% use a HA accessory.

• Importance of listening situations and satisfaction with HAs
  – 82% of the hearing aid owners say their hearing aid works better than or as expected
  – 76% (2015: 77%) of the HA owners are satisfied with their HAs.
  – The more hours worn per day, the higher the satisfaction.
  – Satisfaction with newer hearing aids is higher than with older hearing aids.
  – Talking at home with family members, talking on a phone and conversations with 1 person are the most frequent important listening situations.

• Positive impact of HAs
  – Significant positive impact of HAs on different aspects – especially communication, participation in group activities and sense of safety.
  – 97% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes
Summary

4. Analysis of hearing impaired non-owners

- Reasons not to own/use HAs
  - Only 42% (2015: 39%) 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 people say that they are uncomfortable, they do not restore hearing to normal and they hear well enough in most situations.
  - 6% who own HAs don’t use them at all (0 hour); 12% use them less than one hour/day (0-1 hour).

- Social rejection, buying intentions and triggers to buy
  - 71% of hearing aid owners feel that people don’t 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 40% say they are never made fun of because of their hearing loss).
  - The most important trigger to buy a hearing aid is worsening hearing loss and the ENT followed by “Akustiker” and spouse. Insurance coverage/price of hearing aids is much more relevant for the non owners.
1. **Introduction**
   - Organisation of EuroTrak 2018
   - 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 before getting hearing aids, 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 accessories**
   - 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 2018

Organisation

- Principal of the project EuroTrak is the European Hearing Instrument Manufacturers Association [EHIMA]. Members of EHIMA are: GN Resound as, William Demant Holding A/S, Sonova AG, Sivantos Pte. Ltd., STARKEY LABS and WIDEX AS [EHIMA Companies].
- Anovum Zurich developed the concept of EuroTrak, designed the questionnaire and conducted the fieldwork in cooperation with a panel company. Furthermore Anovum analysed the data and prepared the presentation.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire.

Use of the data

- The principal as well as the EHIMA companies 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 or the EHIMA companies use the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:
  "Source: Anovum – EuroTrak – GERMANY/2018/n=[relevant sample size]"

- The principal and EHIMA companies can ask Anovum to further analyse the raw data in specific ways at their own expense.

- EHIMA companies can order a report with satisfaction scores for their brand. The other brands will be shown as benchmarks without denomination (brand A, brand B etc.). The report will show all satisfaction values. It is not allowed to communicate any information from these reports outside the EHIMA company.
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 panelist pools of more than 80’000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of \( n=13'583 \) 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: \( n=536 \) hearing aid owners and \( n=766 \) 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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Overview hearing loss prevalence and hearing aid adoption

EuroTrak hearing loss prevalence and hearing aid adoption

- Hearing impaired (stated)
- Adoption (% of population)
- Adoption (% of stated impaired)
Hearing aid adoption rate Germany:
37% of hearing impaired have hearing aid(s), 71% of them have binaural treatment
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

Hearing loss characteristics: Owners compared to non-owners

<table>
<thead>
<tr>
<th></th>
<th>HA-Non-owner 2018: n=766</th>
<th>HA Owner 2018: n=536</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(stated)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>41%</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>59%</td>
<td>83%</td>
<td>48%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>45%</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>Moderate</td>
<td>44%</td>
<td>49%</td>
<td>41%</td>
</tr>
<tr>
<td>Severe</td>
<td>7%</td>
<td>24%</td>
<td>66%*</td>
</tr>
<tr>
<td>Profound</td>
<td>3%</td>
<td>8%</td>
<td></td>
</tr>
</tbody>
</table>

nä are unweighted whereas the shown results are weighted
* combined severe and profound because n is too small

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Hearing tests and where hearing is tested
Hearing Tests: 45% (2015: 45%) had their hearing tested in the last 5 years – most tests are done by ENT’s

Have you ever taken a hearing test?

- Yes, in the last 12 months 19%
- Yes, in the last 1-5 years 26%
- Yes, more than 5 years ago 24%
- No, never 31%

Where/how was your hearing tested?

- Ear doctor (ENT) 60%
- Family doctor 22%
- "Hörgeräteakustiker" (Hearing Aid Dispenser/Audiologist) 20%
- Online test / smartphone app 2%
- Other 6%
- Don't know 2%

Base=10'370

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The route to the hearing aid: Sources of information and drop-out rates
Doctors and “Hörgeräteakustiker” are the most important sources of information and therefore the major gatekeepers – followed by internet research and other people with hearing aids.

Where did you gather information about hearing aids? Please check all that apply.

- Family doctor, ear doctor (ENT), "Hörgeräteakustiker" 47%
- Internet research: combined (all three) 21%
- Conversations with friends, relatives already fitted with a hearing aid 18%
- Internet research: websites of hearing aids manufacturers 13%
- Internet research: websites of hearing aid clinics 9%
- Internet research: other websites, google... 8%
- Articles in magazines or newspapers 6%
- Print ads received in your mailbox 5%
- I did not gather information about hearing aids 31%
- Other 5%
Of those who discussed the hearing loss with a doctor, 63% 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 ENT specialist?

<table>
<thead>
<tr>
<th></th>
<th>Total (n= 1'026)</th>
<th>Hearing aid (n=485)</th>
<th>Hearing loss but no hearing aid (n=541)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ear doctor (ENT specialist)</td>
<td>63%</td>
<td>58%</td>
<td>67%</td>
</tr>
<tr>
<td>Your family doctor</td>
<td>37%</td>
<td>42%</td>
<td>33%</td>
</tr>
</tbody>
</table>
The route to the hearing aid: Compared to 2015 drop out 1 and 2 were reduced slightly

Base: n=1'302

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

Top 50% hearing loss*

Low 50% hearing loss*

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

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

Base: n=1’302
The route to the hearing aid: GP/Family doctor

Have you discussed your hearing problem with your family doctor?

% Discussed with GP

<table>
<thead>
<tr>
<th></th>
<th>Total hearing impaired</th>
<th>HA owner</th>
<th>Hearing impaired non-owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>EuroTrak 2018</td>
<td>54%</td>
<td>67%</td>
<td>46%</td>
</tr>
<tr>
<td>EuroTrak 2015</td>
<td>48%</td>
<td>65%</td>
<td>39%</td>
</tr>
<tr>
<td>EuroTrak 2012</td>
<td>56%</td>
<td>69%</td>
<td>50%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

<table>
<thead>
<tr>
<th>HA owner (Base: 316)</th>
<th>Recommended no further action</th>
<th>Recommended to get a hearing aid</th>
<th>Referred to an ear doctor (ENT)</th>
<th>Referred to a hearing aid dispenser / audiologist (Akustiker)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>11%</td>
<td>72%</td>
<td>47%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Impaired non-owner (Base: 348)</th>
<th>Recommended no further action</th>
<th>Recommended to get a hearing aid</th>
<th>Referred to an ear doctor (ENT)</th>
<th>Referred to a hearing aid dispenser / audiologist (Akustiker)</th>
</tr>
</thead>
<tbody>
<tr>
<td>19%</td>
<td>7%</td>
<td>63%</td>
<td>20%</td>
<td></td>
</tr>
</tbody>
</table>
The route to the hearing aid: ENT
Have you discussed your hearing problem with an ear doctor (ENT)?

% Discussed with ENT

<table>
<thead>
<tr>
<th></th>
<th>EuroTrak 2018 Base: 1'302</th>
<th>EuroTrak 2015 Base: 1'304</th>
<th>EuroTrak 2012 Base: 1'364</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total hearing impaired</td>
<td>77%</td>
<td>73%</td>
<td>75%</td>
</tr>
<tr>
<td>HA owner</td>
<td>90%</td>
<td>91%</td>
<td>89%</td>
</tr>
<tr>
<td>Hearing impaired non-owners</td>
<td>69%</td>
<td>62%</td>
<td>68%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

**HA owner (Base: 432)**
- Did prescribe a hearing aid: 77%
- Referred to a hearing aid dispenser / audiologist (Akustiker): 41%
- Recommended no further action: 1%

**Impaired non-owner (Base: 520)**
- Did prescribe a hearing aid: 10%
- Referred to a hearing aid dispenser / audiologist (Akustiker): 32%
- Recommended no further action: 60%
The route to the hearing aid: Akustiker

Have you discussed your hearing problem with an Audiologist ("Akustiker")?

% Discussed with Akustiker

- Total hearing impaired
  - 53%
  - 45%
  - 42%
- HA owner
  - 92%
  - 83%
- Hearing impaired non-owners
  - 29%
  - 24%
  - 21%

What did he/she recommend?

- HA owner (Base: 484)
  - Recommended to get a hearing aid: 99%
  - Recommended not to get a hearing aid: 1%

- Impaired non-owner (Base: 193)
  - Recommended to get a hearing aid: 69%
  - Recommended not to get a hearing aid: 31%
Recommendations by profession

- **GP (N=663)**
  - Referred to an ear doctor (ENT): 67%
  - Referred to a hearing aid dispenser / audiologist (Akustiker): 33%
  - Recommended to get a hearing aid (2015: 39%)
  - Recommended no further action: 9%

- **ENT (N=953)**
  - Referred to an ear doctor (ENT): 41%
  - Referred to a hearing aid dispenser / audiologist (Akustiker): 33%
  - Recommended to get a hearing aid (2015: 39%)

- **Akustiker (N=677)**
  - Referred to a hearing aid dispenser / audiologist (Akustiker): 89%
  - Recommended no further action: 11%

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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:** 95% of the working hearing aid owners state their hearing aid(s) are useful on their job.

How useful are your hearing aids on your job?

- 62% of significant use
- 32% of some use
- 5% of no use

Base: N=244

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**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.

<table>
<thead>
<tr>
<th></th>
<th>Disagree strongly</th>
<th>Rather disagree</th>
<th>Neutral</th>
<th>Rather agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hearing aid</strong></td>
<td>10%</td>
<td>16%</td>
<td>31%</td>
<td>24%</td>
<td>18%</td>
</tr>
<tr>
<td><strong>Hearing loss, no hearing aid</strong></td>
<td>25%</td>
<td>19%</td>
<td>32%</td>
<td>19%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Hearing aid</strong></td>
<td>9%</td>
<td>16%</td>
<td>31%</td>
<td>28%</td>
<td>15%</td>
</tr>
<tr>
<td><strong>Hearing loss, no hearing aid</strong></td>
<td>26%</td>
<td>19%</td>
<td>31%</td>
<td>19%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Hearing aid</strong></td>
<td>11%</td>
<td>16%</td>
<td>40%</td>
<td>21%</td>
<td>13%</td>
</tr>
<tr>
<td><strong>Hearing loss, no hearing aid</strong></td>
<td>27%</td>
<td>20%</td>
<td>33%</td>
<td>16%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Base: hearing aid n=426 / Hearing loss, no hearing aid =624
**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

- **Hearing aid**
  - Probability of major depressive disorder
  - Very high: 5%
  - Medium: 70%
  - Very low: 25%

- **Top 50% hearing loss, no hearing aid**
  - Probability of major depressive disorder
  - Very high: 6%
  - Medium: 85%
  - Very low: 9%

Base: hearing aid n=391 / no hearing aid =138

*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 (Top 50% hearing loss*), hearing aid owners feel less exhausted in the evenings.

- **In the evenings I often feel physically exhausted**
  - Hearing aid: 11% Disagree strongly, 16% Rather disagree, 34% Neutral, 30% Rather agree, 9% Strongly agree
  - Top 50% hearing loss, no hearing aid: 14% Disagree strongly, 8% Rather disagree, 17% Neutral, 34% Rather agree, 28% Strongly agree

- **In the evenings I often feel mentally exhausted**
  - Hearing aid: 14% Disagree strongly, 17% Rather disagree, 38% Neutral, 24% Rather agree, 7% Strongly agree
  - Top 50% hearing loss, no hearing aid: 14% Disagree strongly, 9% Rather disagree, 25% Neutral, 29% Rather agree, 23% Strongly agree

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

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

Are you generally satisfied with the quality of your sleep?

- Top 50% hearing loss, no hearing aid (n=138):
  - No: 57%
  - Yes: 43%

- Hearing aid (n=391):
  - No: 35%
  - Yes: 65%

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30% of all hearing impaired think that hearing loss could be linked to depression.

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

- Depression: 30%
- Sleeping disorder: 22%
- High blood pressure: 22%
- Dementia: 11%
- Poor eyesight: 10%
- Diabetes: 8%
- Back problems: 8%

Hearing loss is not linked to any of those health issues: 47%

Hearing impaired, N=1’251
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 and moderate hearing loss

<table>
<thead>
<tr>
<th>Stated hearing loss</th>
<th>(% of impaired population*)</th>
<th>Adoption rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2018</td>
</tr>
<tr>
<td>Profound</td>
<td>(5%)</td>
<td>2%</td>
</tr>
<tr>
<td>Severe</td>
<td>(14%)</td>
<td>4%</td>
</tr>
<tr>
<td>Moderate</td>
<td>(46%)</td>
<td>27%</td>
</tr>
<tr>
<td>Mild</td>
<td>(35%)</td>
<td>28%</td>
</tr>
</tbody>
</table>

Adoption rate %

Base: n=1'304
Sums can differ from 100% due to rounding.
* combined "severe" and "profound" because n is too small.

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66% of the currently owned HAs were fitted in 2015 or later

Age of currently owned HAs (Mean):
2018: 2.9 years
2015: 2.9 years
2012: 3.0 years
On average 2 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 6 years before they are being replaced.

Current HAs = first HAs?

- 2015: 63%
  - Yes: 66%
  - No: 34%

How many years did you own your previous HAs?

- 20% 1-3 years
- 56% 4-6 years
- 16% 7-10 years
- 8% 11 years or longer

Base: n=148

Age of HA before it has been replaced:
- 2018: 6 years (median)
- 2015: 5 years (median)

Thinking back before you purchased your first hearing aid: How many years have passed since you became aware of your hearing loss until you purchased a hearing aid?

- 34% 1 year
- 36% 2 years
- 15% 3 years
- 8% 4-6 years
- 7% more than 6 years

Base: n=349

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60% 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
- Better mental/emotional health
- Better performance at work
- Less fatigue in the evening
- Other opportunity

Base: n=291
While more than 50% of hearing impaired without hearing aids tend not to know whether a third party would pay – more than 90% of the hearing aid owners received some kind of 3rd party reimbursement.

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

- Yes, completely (2015: 30%)
- Yes, partly (2015: 62%)
- No (2015: 6%)
- don't know (2015: 3%)

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

- Yes (2015: 39%)
- No (2015: 11%)
- don't know (2015: 50%)
Specialized hearing aid store is by far the preferred place for obtaining hearing aids (both for owners and non owners).

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

![Bar chart showing preferences for owners](chart)

- Specialized hearing aid store: 88%
- Optician: 7%
- Pharmacy: 2%
- Online: 2%
- Department store: 0%
- Club store: 0%
- Other: 0%

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

![Bar chart showing preferences for non owners](chart)

- Specialized hearing aid store: 91%
- Optician: 4%
- Pharmacy: 2%
- Online: 2%
- Department store: 0%
- Club store: 0%
- Other: 1%

HA-owner, n=536
HA-non-owner, n=766
Recommendation intention of the place where the hearing aid(s) have been obtained is good, with a positive NPS score of 32.

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 = 32
On average, HAs are worn 9.0 hours a day

How many hours a day are HA worn? (cum. %)

HA-worn:
2018: n=536
2015: n=505
2012: n=500

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Only 39% of today’s hearing aid owners are aware of their hearing aid brand.

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

- 39% Yes, I know it by heart
- 23% No, but I could find out
- 38% No, and can’t find out

Base: N=536

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15% of the HA owners use an accessory for their hearing aids. 70% of those who use an accessory, are satisfied with it.

Have you been informed by your hearing care professional about hearing aid accessories, such as TV-Streamer/Apps/Remote Control/etc.? *(HA owners, n=536)*

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>don't know / no answer</th>
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</thead>
<tbody>
<tr>
<td><strong>46%</strong></td>
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<tr>
<td><strong>38%</strong></td>
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<tr>
<td><strong>16%</strong></td>
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</tbody>
</table>

Do you personally use accessories for your hearing aids (TV-Streamer/Apps/Remote Control/etc.)? *(HA owners, n=536)*

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>15%</strong></td>
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</tr>
<tr>
<td><strong>85%</strong></td>
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</tbody>
</table>

*IF ACCESSORIES USED (n=110):*

Overall, how satisfied with the performance of your accessory(s)?

<table>
<thead>
<tr>
<th></th>
<th>very dissatisfied</th>
<th>dissatisfied</th>
<th>somewhat dissatisfied</th>
<th>neutral</th>
<th>somewhat satisfied</th>
<th>satisfied</th>
<th>very satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>6%</strong></td>
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<td><strong>10%</strong></td>
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<td><strong>13%</strong></td>
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<td><strong>18%</strong></td>
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<tr>
<td><strong>31%</strong></td>
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<tr>
<td><strong>21%</strong></td>
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</tbody>
</table>
Satisfaction with hearing aids and drivers
82% of the hearing aid owners say their hearing aid works better than or as expected.

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

- 31% hearing aids work better than I expected
- 51% hearing aids work as I expected
- 18% hearing aids work worse than I expected

Base: N=536

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Overall satisfaction with HA stays on a good level with 76% of the users being satisfied.

- Total HA-user (n=536)
  - 3% very dissatisfied
  - 3% dissatisfied
  - 11% somewhat dissatisfied
  - 23% neutral
  - 36% somewhat satisfied
  - 16% satisfied
  - 16% very satisfied

- up to two years old (n=229)
  - 4% very dissatisfied
  - 6% dissatisfied
  - 24% somewhat dissatisfied
  - 41% neutral
  - 22% somewhat satisfied
  - 16% satisfied
  - 7% very satisfied

- older than 2 years (n=299)
  - 3% very dissatisfied
  - 6% dissatisfied
  - 9% somewhat dissatisfied
  - 13% neutral
  - 34% somewhat satisfied
  - 12% satisfied
  - 12% very satisfied

- HA worn up to 4 hrs/day (n=96)
  - 9% very dissatisfied
  - 4% dissatisfied
  - 15% somewhat dissatisfied
  - 16% neutral
  - 25% somewhat satisfied
  - 18% satisfied
  - 13% very satisfied

- HA worn 4-8 hrs/day (n=148)
  - 8% very dissatisfied
  - 6% dissatisfied
  - 15% somewhat dissatisfied
  - 31% neutral
  - 32% somewhat satisfied
  - 12% satisfied
  - 8% very satisfied

- HA worn more than 8 hrs/day (n=292)
  - 3% very dissatisfied
  - 4% dissatisfied
  - 7% somewhat dissatisfied
  - 19% neutral
  - 46% somewhat satisfied
  - 20% satisfied
  - 20% very satisfied
Satisfaction with current hearing aids

<table>
<thead>
<tr>
<th>Dispenser</th>
<th>Trend*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of dispensers counseling</td>
<td>89% (+6%)</td>
</tr>
<tr>
<td>Quality of service during hearing aid fitting period</td>
<td>88% (+4%)</td>
</tr>
<tr>
<td>Professionalism of dispenser</td>
<td>87% (+2%)</td>
</tr>
<tr>
<td>Quality of service after purchase</td>
<td>86% (+5%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sound quality signal process.</th>
<th>Trend*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural sounding</td>
<td>71% (-1%)</td>
</tr>
<tr>
<td>Richness or fidelity of sound</td>
<td>70% (-4%)</td>
</tr>
<tr>
<td>Clearness of tone and sound</td>
<td>69% (-3%)</td>
</tr>
<tr>
<td>Comfort with loud sounds</td>
<td>66% (+1%)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product features</th>
<th>Trend*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ease of changing battery</td>
<td>85% (+1%)</td>
</tr>
<tr>
<td>Reliability</td>
<td>82% (+3%)</td>
</tr>
<tr>
<td>Visibility to others</td>
<td>78% (+0%)</td>
</tr>
<tr>
<td>Overall fit/ Comfort</td>
<td>78% (+2%)</td>
</tr>
<tr>
<td>Managing whistling/feedback/buzzing</td>
<td>70% (+1%)</td>
</tr>
<tr>
<td>Value (performance versus money spent)</td>
<td>70% (+9%)</td>
</tr>
<tr>
<td>Battery life</td>
<td>62% (-5%)</td>
</tr>
</tbody>
</table>

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

*% of satisfied HA owners compared to EuroTrak 2015

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Satisfaction with current hearing aids

Listening situation

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

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

Trend*:
- Conversation with one Person: -5%
- Listening to Music: +0%
- When riding in a car: -2%
- Outdoors: -1%
- Leisure activities: +7%
- In a store, when shopping: -5%
- When talking to children: -0%
- Watching TV: -4%
- Conversation in small groups: -1%
- At home with family members: -5%
- On the telephone: -1%
- In the workplace: +0%
- At a movie theater: +0%
- In school or a classroom (as an observer or student): +9%
- In a larger lecture hall (e.g., theater, concert hall,...): +4%
- Conversation in large groups: +2%
- Use in noisy situations: +5%

*% of satisfied HA owners compared to EuroTrak 2015

© Anovum 2018 - EuroTrak Germany 2018
Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA

<table>
<thead>
<tr>
<th>Dispenser</th>
<th>Influence on overall satisfaction with HA*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professionalism of dispenser</td>
<td>0.61</td>
</tr>
<tr>
<td>Quality of service during hearing aid fitting period</td>
<td>0.61</td>
</tr>
<tr>
<td>Quality of dispensers counseling</td>
<td>0.57</td>
</tr>
<tr>
<td>Quality of service after purchase</td>
<td>0.52</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sound quality/signal process</th>
<th>Influence on overall satisfaction with HA*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort with loud sounds</td>
<td>0.74</td>
</tr>
<tr>
<td>Natural sounding</td>
<td>0.72</td>
</tr>
<tr>
<td>Clarity of tone and sound</td>
<td>0.72</td>
</tr>
<tr>
<td>Richness or fidelity of sound</td>
<td>0.69</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product features</th>
<th>Influence on overall satisfaction with HA*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managing whistling/feedback/buzzing</td>
<td>0.68</td>
</tr>
<tr>
<td>Reliability</td>
<td>0.66</td>
</tr>
<tr>
<td>Overall fit/ Comfort</td>
<td>0.65</td>
</tr>
<tr>
<td>Visibility to others</td>
<td>0.57</td>
</tr>
<tr>
<td>Ease of changing battery</td>
<td>0.55</td>
</tr>
<tr>
<td>Value (performance versus money spent)</td>
<td>0.54</td>
</tr>
<tr>
<td>Battery life</td>
<td>0.37</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: comfort with loud sounds is the most important criterion 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: 53%
- When talking on a phone: 48%
- In conversations with 1 person: 44%
- When watching TV with others: 43%
- In conversations with large groups: 39%
- In conversations with small groups: 38%
- In noisy situations: 28%
- In a larger lecture hall (e.g., theater, concert hall, place of worship, etc.): 23%
- In the workplace: 22%
- When riding in a car: 21%
- When talking to children: 15%
- In a store, when shopping: 15%
- When listening to music: 13%
- Outdoors: 10%
- During leisure activities (e.g., exercising, taking a walk, etc.): 8%
- At a movie theater: 6%
- In school or a classroom (as an observer or student): 5%

Hearing loss Total (n=1302)
Hearing aid (n=536)
Hearing loss but no hearing aid (n=766)
Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially communication effectiveness, participation in group activities and sense of safety 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...
- 4% A lot worse
- 24% Worse
- 46% The same
- 22% Better
- 2% A lot better

Ability to participate in group activities
- 7% A lot worse
- 29% Worse
- 40% The same
- 21% Better
- 3% A lot better

Sense of safety
- 5% A lot worse
- 38% Worse
- 35% The same
- 21% Better
- 2% A lot better

Social life
- 4% A lot worse
- 39% Worse
- 36% The same
- 20% Better
- 3% A lot better

Sense of independence
- 6% A lot worse
- 41% Worse
- 33% The same
- 18% Better
- 2% A lot better

Feelings about yourself
- 5% A lot worse
- 44% Worse
- 29% The same
- 22% Better
- 2% A lot better

Relationships at work
- 5% A lot worse
- 44% Worse
- 28% The same
- 23% Better
- 2% A lot better

Mental/emotional health
- 3% A lot worse
- 46% Worse
- 32% The same
- 17% Better
- 2% A lot better

Confidence in yourself
- 5% A lot worse
- 47% Worse
- 25% The same
- 20% Better
- 1% A lot better

Relationships at home
- 9% A lot worse
- 54% Worse
- 27% The same
- 16% Better
- 1% A lot better

Mental ability
- 1% A lot worse
- 54% Worse
- 25% The same
- 17% Better
- 2% A lot better

Physical health
- 5% A lot worse
- 52% Worse
- 26% The same
- 15% Better
- 2% A lot better

HA-owner, n=532
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

% of HA owners feeling better/a lot better

Low 50% hearing loss (n=150)  Top 50% hearing loss (n=349)
2 out of 3 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: 68%
- No: 32%

Base: N=536
Even 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**: 10% worse, 28% the same, 30% better, 29% a lot better
- **Social activities together with Person**: 10% worse, 43% the same, 28% better, 16% a lot better
- **Personal relationship with Person**: 5% worse, 60% the same, 18% better, 16% a lot better
- **Quarrels/disputes with Person**: 8% worse, 59% the same, 20% better, 12% a lot better

Someone in HH / parent has HA, n=468
97% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.

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

- Never: 3%
- Rarely: 14%
- Occasionally: 35%
- Regularly: 48%

Base: N=536

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

Hearing loss characteristics: Owners compared to non-owners

<table>
<thead>
<tr>
<th></th>
<th>% HA Owner (n=536)</th>
<th>%HA-Non-owner Low 50% HL (n=421)</th>
<th>%HA-Non-owner Top 50% HL (n=219)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
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</tr>
<tr>
<td>Unilateral loss</td>
<td>17%</td>
<td>49%</td>
<td>26%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>83%</td>
<td>51%</td>
<td>74%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
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<tr>
<td>Mild</td>
<td>19%</td>
<td>57%</td>
<td>17%</td>
</tr>
<tr>
<td>Moderate</td>
<td>49%</td>
<td>36%</td>
<td>63%</td>
</tr>
<tr>
<td>Severe</td>
<td>24%</td>
<td>4%</td>
<td>15%</td>
</tr>
<tr>
<td>Profound</td>
<td>8%</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

Uncomfortable: 47%Reason, 26%Somewhat a reason, 27%Not a reason

They do not restore your hearing to normal: 36%Reason, 31%Somewhat a reason, 33%Not a reason

Hear well enough in most situations: 31%Reason, 30%Somewhat a reason, 39%Not a reason

Hearing loss not severe enough: 35%Reason, 24%Somewhat a reason, 41%Not a reason

Have more serious priorities: 33%Reason, 21%Somewhat a reason, 46%Not a reason

They do not work well in noisy situations: 27%Reason, 27%Somewhat a reason, 46%Not a reason

Have hearing loss only with high pitch sounds: 28%Reason, 25%Somewhat a reason, 47%Not a reason

Cannot afford a hearing aid: 39%Reason, 13%Somewhat a reason, 49%Not a reason

Ear doctors opinion (ENT): 32%Reason, 18%Somewhat a reason, 50%Not a reason

Have tinnitus (ringing in ears): 37%Reason, 11%Somewhat a reason, 51%Not a reason

Base: non owners Top 50% HL: n=219

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### 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>
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</thead>
<tbody>
<tr>
<td>Another hearing aid owners opinion</td>
<td>23%</td>
<td>23%</td>
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<td></td>
<td></td>
<td></td>
<td>54%</td>
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<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>22%</td>
<td>23%</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td>54%</td>
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<tr>
<td>Bad design</td>
<td>22%</td>
<td>20%</td>
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<td></td>
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<td></td>
<td>58%</td>
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<tr>
<td>Family doctors opinion (GP)</td>
<td>26%</td>
<td>16%</td>
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<td></td>
<td>58%</td>
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<tr>
<td>I have vision or dexterity problems</td>
<td>28%</td>
<td>12%</td>
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<td></td>
<td>59%</td>
</tr>
<tr>
<td>Social / Family opinion such as child, spouse, friend</td>
<td>20%</td>
<td>19%</td>
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<td></td>
<td></td>
<td>60%</td>
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<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>29%</td>
<td>10%</td>
<td></td>
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<td></td>
<td>61%</td>
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<tr>
<td>Do not admit I have a hearing loss in public</td>
<td>22%</td>
<td>16%</td>
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<td></td>
<td>62%</td>
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<tr>
<td>Have hearing loss in only one ear</td>
<td>21%</td>
<td>16%</td>
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<td></td>
<td></td>
<td>63%</td>
</tr>
<tr>
<td>Would be embarrassed to wear a hearing aid</td>
<td>23%</td>
<td>14%</td>
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<td></td>
<td>63%</td>
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<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>24%</td>
<td>12%</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>63%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>16%</td>
<td>18%</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>66%</td>
</tr>
<tr>
<td>Hearing problem requires surgery</td>
<td>16%</td>
<td>13%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>71%</td>
</tr>
<tr>
<td>Do not trust Hearing Aid Dispenser/Audiologist</td>
<td>15%</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>72%</td>
</tr>
<tr>
<td>Had surgery - hearing aids wont help</td>
<td>19%</td>
<td>7%</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>74%</td>
</tr>
<tr>
<td>Have not had hearing tested yet</td>
<td>15%</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>74%</td>
</tr>
<tr>
<td>Do not know where to get hearing aids</td>
<td>10%</td>
<td>7%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>82%</td>
</tr>
</tbody>
</table>

**Base:** non owners Top 50% HL: n=219
<table>
<thead>
<tr>
<th>Reason</th>
<th>Reason (%)</th>
<th>Somewhat a reason (%)</th>
<th>Not a reason (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>They do not work well in noisy situations</td>
<td>68%</td>
<td>3%</td>
<td>29%</td>
</tr>
<tr>
<td>Uncomfortable</td>
<td>64%</td>
<td>6%</td>
<td>30%</td>
</tr>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>55%</td>
<td>4%</td>
<td>41%</td>
</tr>
<tr>
<td>Hearing loss not severe enough</td>
<td>22%</td>
<td>37%</td>
<td>41%</td>
</tr>
<tr>
<td>I have vision or dexterity problems</td>
<td>52%</td>
<td>6%</td>
<td>42%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>54%</td>
<td>0%</td>
<td>46%</td>
</tr>
<tr>
<td>Have Sensor-neural hearing loss (nerve deafness)</td>
<td>40%</td>
<td>9%</td>
<td>51%</td>
</tr>
<tr>
<td>Hear well enough in most situations</td>
<td>44%</td>
<td>4%</td>
<td>52%</td>
</tr>
<tr>
<td>They do not restore your hearing to normal</td>
<td>39%</td>
<td>6%</td>
<td>56%</td>
</tr>
<tr>
<td>Would be embarrassed to wear a hearing aid</td>
<td>9%</td>
<td>23%</td>
<td>68%</td>
</tr>
</tbody>
</table>

 Owners who don't use, n=23 (low sample!)
45% of the non owners think that a hearing aid (including service) should cost them less than 500 Euro.

Wieviel denken Sie müssten Sie für ein passendes Hörgerät sowie den dazugehörigen Service bezahlen (also inkl. Diagnose, individuelle Anpassung und dem Service nach dem Kauf)?


Question for Germany only
Social rejection because of hearing loss compared to the acceptance of hearing aids
71% 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?

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

Base: N=536

Base: Top 50% hearing loss, no hearing aid N=219

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Most important triggers to buy
The most important influencing factors are worsening hearing loss, ENT/”Akustiker” and Spouse. Insurance coverage/price of hearing aids is much more relevant 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:** Think about the option to obtain / purchase a hearing aid. 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 and the ENT followed by “Akustiker” and spouse.

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

- Hearing loss got/gets worse: 37%
- ENT/ Ear Doctor: 21%
- Spouse: 11%
- Akustiker: 7%
- Friend / relative: 5%
- GP /Family doctor: 4%
- Child: 4%
- Price of hearing aid: 3%
- Free due to coverage by Insurance / Received hearing aid free of charge: 1%
- Safety concerns: 1%
- Another hearing aid owner (word of mouth): 1%
Sample size and random sample error: Rules of thumb

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

<table>
<thead>
<tr>
<th>Sample size</th>
<th>Random sample error</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Real value is within interval:</td>
</tr>
<tr>
<td></td>
<td>Level of proportion: 50%/50%</td>
</tr>
<tr>
<td>50</td>
<td>± 13.9</td>
</tr>
<tr>
<td>100</td>
<td>± 9.8</td>
</tr>
<tr>
<td>250</td>
<td>± 6.2</td>
</tr>
<tr>
<td>500</td>
<td>± 4.4</td>
</tr>
<tr>
<td>1000</td>
<td>± 3.1</td>
</tr>
<tr>
<td>5’000</td>
<td>± 1.4</td>
</tr>
<tr>
<td>10’000</td>
<td>± 1.0</td>
</tr>
</tbody>
</table>
Demographics (1): Hearing instrument adoption rates and populations

<table>
<thead>
<tr>
<th></th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>6'667</td>
<td>13.2%</td>
<td>35.6%</td>
<td>48.5%</td>
<td>54.3%</td>
<td>51.4%</td>
</tr>
<tr>
<td>Female</td>
<td>6'916</td>
<td>11.2%</td>
<td></td>
<td>51.5%</td>
<td>45.7%</td>
<td>48.6%</td>
</tr>
<tr>
<td><strong>Age recoded</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 - 14</td>
<td>1'743</td>
<td>1.9%</td>
<td>4.1%</td>
<td>14.3%</td>
<td>3.0%</td>
<td>0.2%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1'355</td>
<td>4.4%</td>
<td>27.3%</td>
<td>10.9%</td>
<td>4.1%</td>
<td>2.7%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>1'660</td>
<td>5.2%</td>
<td>40.6%</td>
<td>13.2%</td>
<td>4.9%</td>
<td>5.7%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1'606</td>
<td>6.6%</td>
<td>27.8%</td>
<td>12.6%</td>
<td>7.3%</td>
<td>4.8%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>2'149</td>
<td>9.7%</td>
<td>20.3%</td>
<td>16.3%</td>
<td>15.9%</td>
<td>6.9%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>2'032</td>
<td>14.3%</td>
<td>29.0%</td>
<td>14.6%</td>
<td>19.7%</td>
<td>13.8%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1'439</td>
<td>20.8%</td>
<td>35.1%</td>
<td>9.6%</td>
<td>18.5%</td>
<td>17.2%</td>
</tr>
<tr>
<td>74+</td>
<td>1'598</td>
<td>36.0%</td>
<td>51.8%</td>
<td>8.6%</td>
<td>26.5%</td>
<td>48.7%</td>
</tr>
<tr>
<td><strong>Type of household</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>single household</td>
<td>1'983</td>
<td>20.2%</td>
<td>41.2%</td>
<td>13.3%</td>
<td>22.5%</td>
<td>27.0%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>4'366</td>
<td>15.2%</td>
<td>37.0%</td>
<td>31.1%</td>
<td>39.9%</td>
<td>40.0%</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
<td>5'139</td>
<td>6.7%</td>
<td>28.8%</td>
<td>40.2%</td>
<td>23.3%</td>
<td>16.1%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>767</td>
<td>6.1%</td>
<td>30.3%</td>
<td>6.0%</td>
<td>3.1%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>186</td>
<td>51.6%</td>
<td>55.9%</td>
<td>0.8%</td>
<td>4.0%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Other</td>
<td>1'141</td>
<td>9.7%</td>
<td>32.1%</td>
<td>8.6%</td>
<td>7.2%</td>
<td>5.8%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%*  
* 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>
</tr>
</thead>
<tbody>
<tr>
<td>The head of the household (alone or together with someone)</td>
<td>6'912</td>
<td>16.7%</td>
<td>38.8%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>3'157</td>
<td>10.7%</td>
<td>34.6%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>2'497</td>
<td>2.1%</td>
<td>16.4%</td>
</tr>
<tr>
<td>Other person</td>
<td>1'017</td>
<td>11.2%</td>
<td>33.2%</td>
</tr>
<tr>
<td>Employment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full time employed</td>
<td>4'972</td>
<td>9.2%</td>
<td>27.8%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>1'457</td>
<td>9.2%</td>
<td>25.7%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>780</td>
<td>8.7%</td>
<td>35.8%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme</td>
<td>173</td>
<td>11.2%</td>
<td>41.2%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>1'309</td>
<td>25.1%</td>
<td>40.4%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>2'102</td>
<td>28.0%</td>
<td>47.6%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>958</td>
<td>3.2%</td>
<td>13.5%</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hauptschule</td>
<td>1'543</td>
<td>19.6%</td>
<td>41.7%</td>
</tr>
<tr>
<td>Mittlere Reife (Realschule)</td>
<td>2'195</td>
<td>11.1%</td>
<td>34.3%</td>
</tr>
<tr>
<td>Abitur/Fachabitur</td>
<td>1'691</td>
<td>8.6%</td>
<td>41.9%</td>
</tr>
<tr>
<td>Lehrabschluss/Anlehre</td>
<td>2'555</td>
<td>16.6%</td>
<td>35.5%</td>
</tr>
<tr>
<td>Höhere Berufsabschung (Techniker, Meister o.Ä.)</td>
<td>838</td>
<td>17.2%</td>
<td>37.9%</td>
</tr>
<tr>
<td>Fachhochschule</td>
<td>824</td>
<td>13.8%</td>
<td>35.5%</td>
</tr>
<tr>
<td>Universitätsabschluss</td>
<td>1'725</td>
<td>12.3%</td>
<td>37.2%</td>
</tr>
<tr>
<td>Anderes</td>
<td>379</td>
<td>10.8%</td>
<td>39.5%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%*  

<table>
<thead>
<tr>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>48.3%</td>
<td>67.5%</td>
<td>73.3%</td>
</tr>
<tr>
<td>23.7%</td>
<td>21.1%</td>
<td>19.0%</td>
</tr>
<tr>
<td>20.5%</td>
<td>4.2%</td>
<td>1.4%</td>
</tr>
<tr>
<td>7.6%</td>
<td>7.3%</td>
<td>6.2%</td>
</tr>
<tr>
<td>44.6%</td>
<td>32.4%</td>
<td>20.8%</td>
</tr>
<tr>
<td>13.1%</td>
<td>9.8%</td>
<td>5.7%</td>
</tr>
<tr>
<td>7.0%</td>
<td>4.3%</td>
<td>4.0%</td>
</tr>
<tr>
<td>1.5%</td>
<td>1.1%</td>
<td>1.3%</td>
</tr>
<tr>
<td>9.7%</td>
<td>19.3%</td>
<td>21.8%</td>
</tr>
<tr>
<td>14.9%</td>
<td>30.3%</td>
<td>45.8%</td>
</tr>
<tr>
<td>9.2%</td>
<td>2.6%</td>
<td>0.7%</td>
</tr>
<tr>
<td>12.2%</td>
<td>17.4%</td>
<td>20.7%</td>
</tr>
<tr>
<td>19.3%</td>
<td>15.8%</td>
<td>13.7%</td>
</tr>
<tr>
<td>15.3%</td>
<td>8.3%</td>
<td>9.9%</td>
</tr>
<tr>
<td>21.0%</td>
<td>26.9%</td>
<td>24.6%</td>
</tr>
<tr>
<td>6.9%</td>
<td>8.8%</td>
<td>8.9%</td>
</tr>
<tr>
<td>7.0%</td>
<td>7.2%</td>
<td>6.6%</td>
</tr>
<tr>
<td>15.0%</td>
<td>13.1%</td>
<td>12.9%</td>
</tr>
<tr>
<td>3.3%</td>
<td>2.4%</td>
<td>2.6%</td>
</tr>
</tbody>
</table>

* Small sample sizes in some categories