

Results

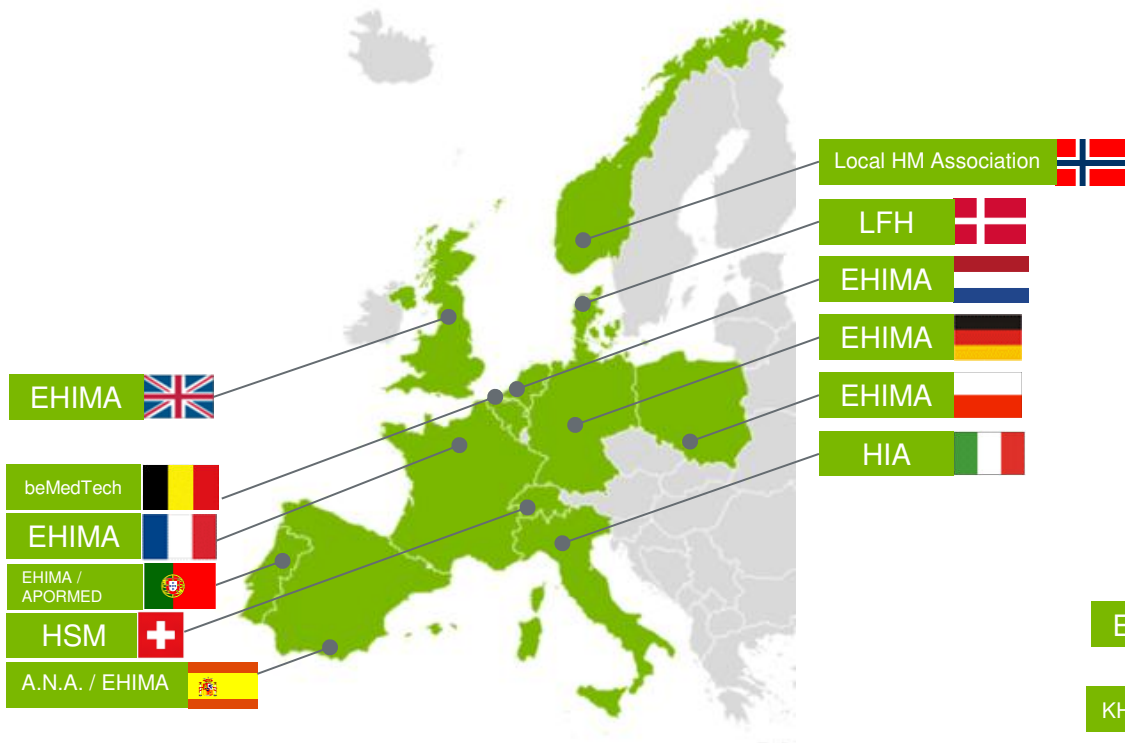
EuroTrak FRA 2025

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

Summary

1. Introduction

EuroTrak FRA 2025 is part of the EuroTrak / APACTrak studies:



EuroTrak FRA 2025 was designed and executed by Anovum (Zurich) on behalf of EHIMA and SNITEM.

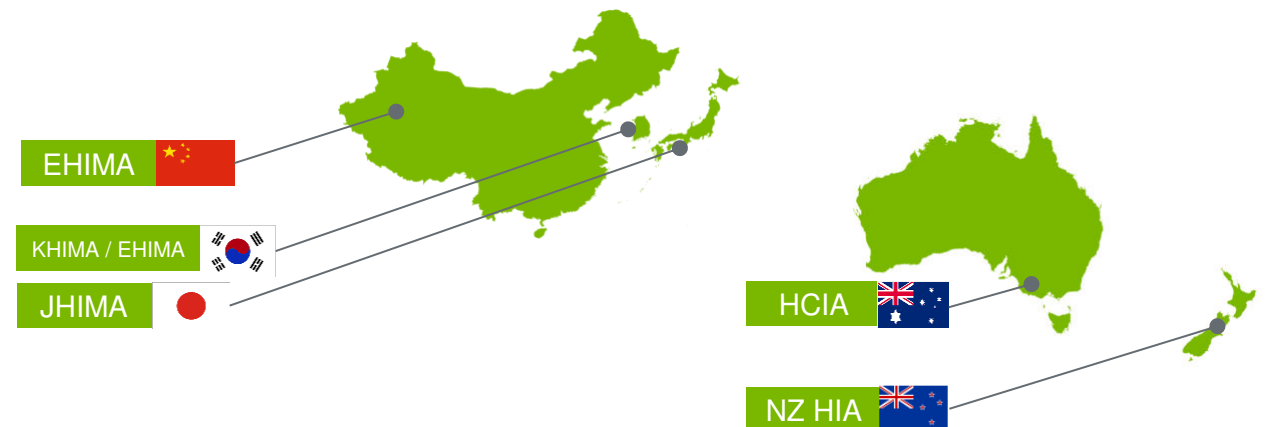
Sample sizes:

Representative sample (sample 1): n=14'939 people

Hearing impaired (sample 2): n=1'304 people

Hearing impaired non-owners (HA Non-owner): n=599 people

Hearing aid owner (HA Owner): n=705 people



Summary

2. Market overview

- **Stated hearing loss prevalence**
 - Total: 9.7%%, 18+: 11.5%.
 - Hearing Tests: Hearing Tests: 33% had a hearing test in the last five years, most of which were done by ENTs, followed by family doctors and Audiologists.
- **Hearing aid adoption rate (HA penetration)**
 - 55% of those with self-declared HL.
 - 5.4% of total population.
 - 74% 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.
 - 67% got hearing aids recommended from the ENT or family doctor (drop out rate=18%).
 - 79% of the GP consultations referred to an ENT, 27% to an Audiologist, and 14% to get hearing aids. 4% recommended no action.
 - 39% of ENT consultations were referred to an Audiologist, 60% recommended getting a hearing aid, and 19% 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.
 - 45% of employed individuals using hearing aids believe the devices enable them to work longer

Summary

3. Analysis of hearing aid owners

- **Hearing aid ownership, usage, and accessories**
 - 90% of all HA owners received some 3rd party reimbursement.
 - 57% of the currently owned HAs were acquired in 2023 or later.
 - The median age of hearing aids before replacement is five years.
 - On average, HAs are worn 8.8 hours a day.
 - RICs are the most often purchased type of HA.
 - Cochlear Implants: 15% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
 - 42% of HA owners use a hearing aids app, and 80% are satisfied.
 - 14% of the HAs are (to the knowledge of the owners) equipped with Telecoil. The main usage of Telecoil is the phone.
- **Importance of listening situations and satisfaction with HAs**
 - 77% of the hearing aid owners say their hearing aid works better than or as expected.
 - 83% of the HA owners are satisfied with their hearing aids.
 - The more hours worn per day, the higher the satisfaction with the HA.
 - Satisfaction with newer hearing aids is higher than with older hearing aids.
 - The most important listening situations are talking at home with family members, conversations in large groups and watching TV.
- **Positive impact of HAs**
 - Hearing aids have a positive impact on communication ability, social participation, relationships at home, and many other aspects of life.
 - 73% of hearing aid owners feel more confident moving in a city since wearing hearing aids.
 - 97% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
 - 63% of all HA owners think they should have gotten their HAs sooner

Summary

4. Analysis of hearing impaired non-owners

- **Reasons not to own/use HAs**

- 49% 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 the opinions of ENT specialists, audiologists, and family doctors.
- 4% who own hearing aids don't use them (0 hours); 11% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**

- 75% 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 factors influencing the decision to get hearing aids are recommendations from ENTs, worsening hearing loss, and guidance from audiologists. Additionally, price and insurance coverage play a role, especially for those who do not yet own hearing aids.

Detailed Results: Roadmap

1. Introduction

- Organisation of EuroTrak FRA 2025
- 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, third party payment
 - 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 FRA 2025

Organisation

- Principal of the project EuroTrak FRA 2025 are: EHIMA and SNITEM.
- Anovum Zurich developed the concept of EuroTrak FRA, 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

- The principal 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 FRA/2025/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=14'939** people based on census data.

Step 2: Target population interviews

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

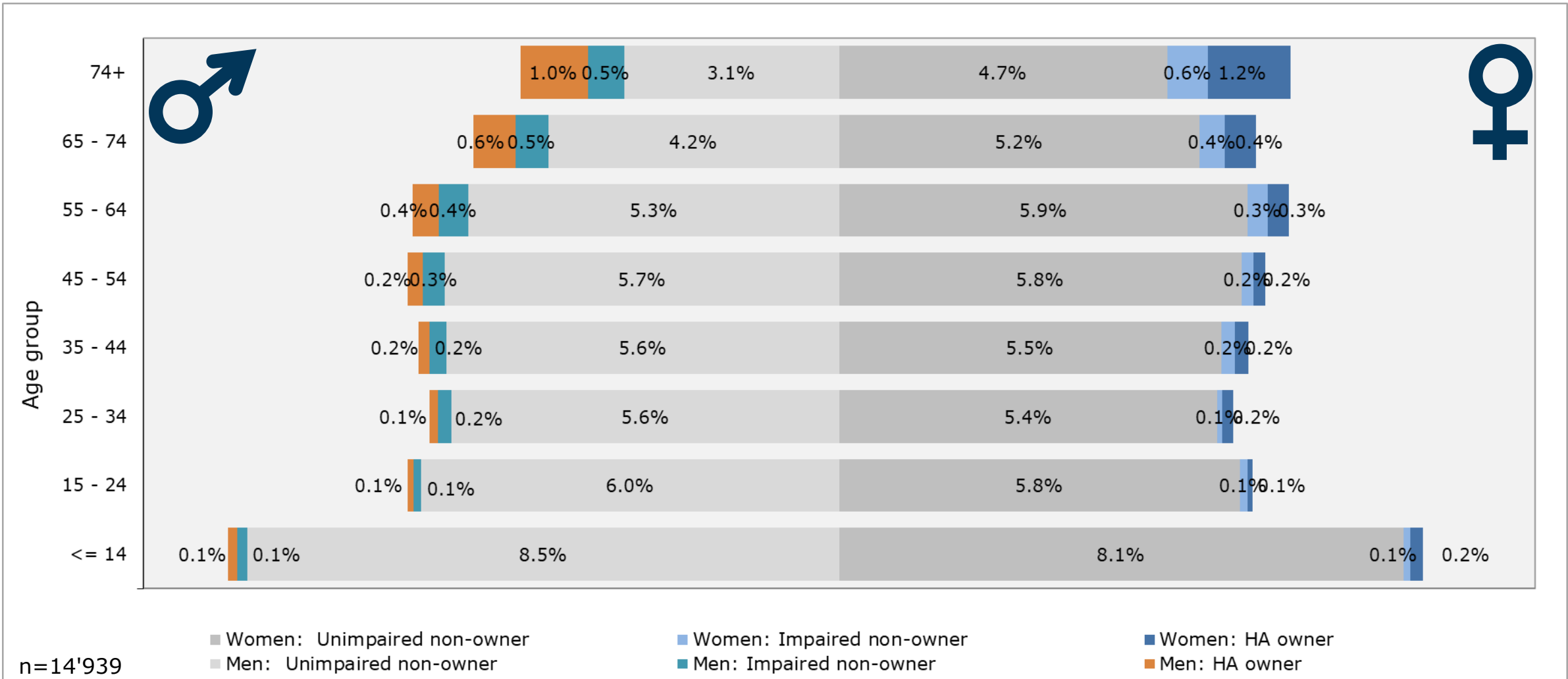
Process:

1. Main questionnaires: Owners and hearing impaired non-owners
2. Balancing through weighting according to representative screening interviews
3. Resulting sample: **n= 599** hearing impaired non-owners and **n=705** hearing aid owners

2. Market overview

Prevalence of hearing loss and adoption rate

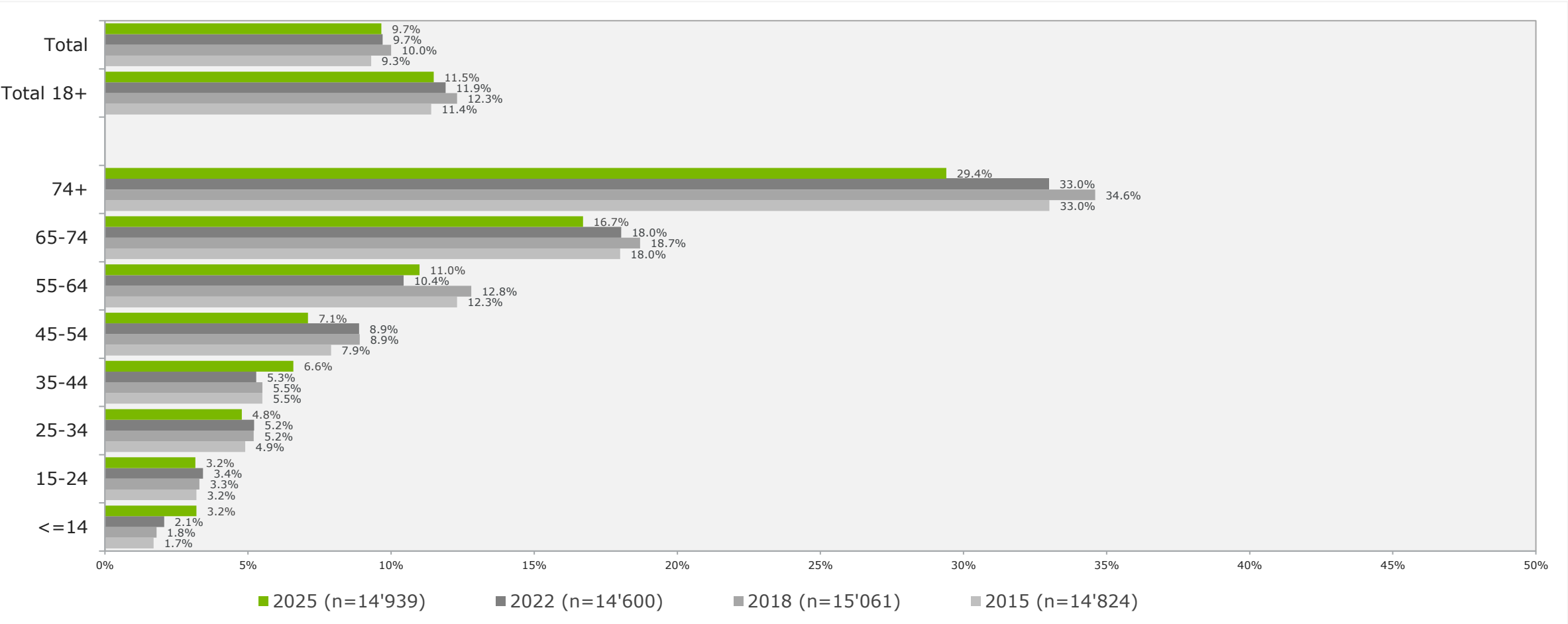
Hearing loss and hearing instrument ownership by gender/age



Hearing loss prevalence FRA

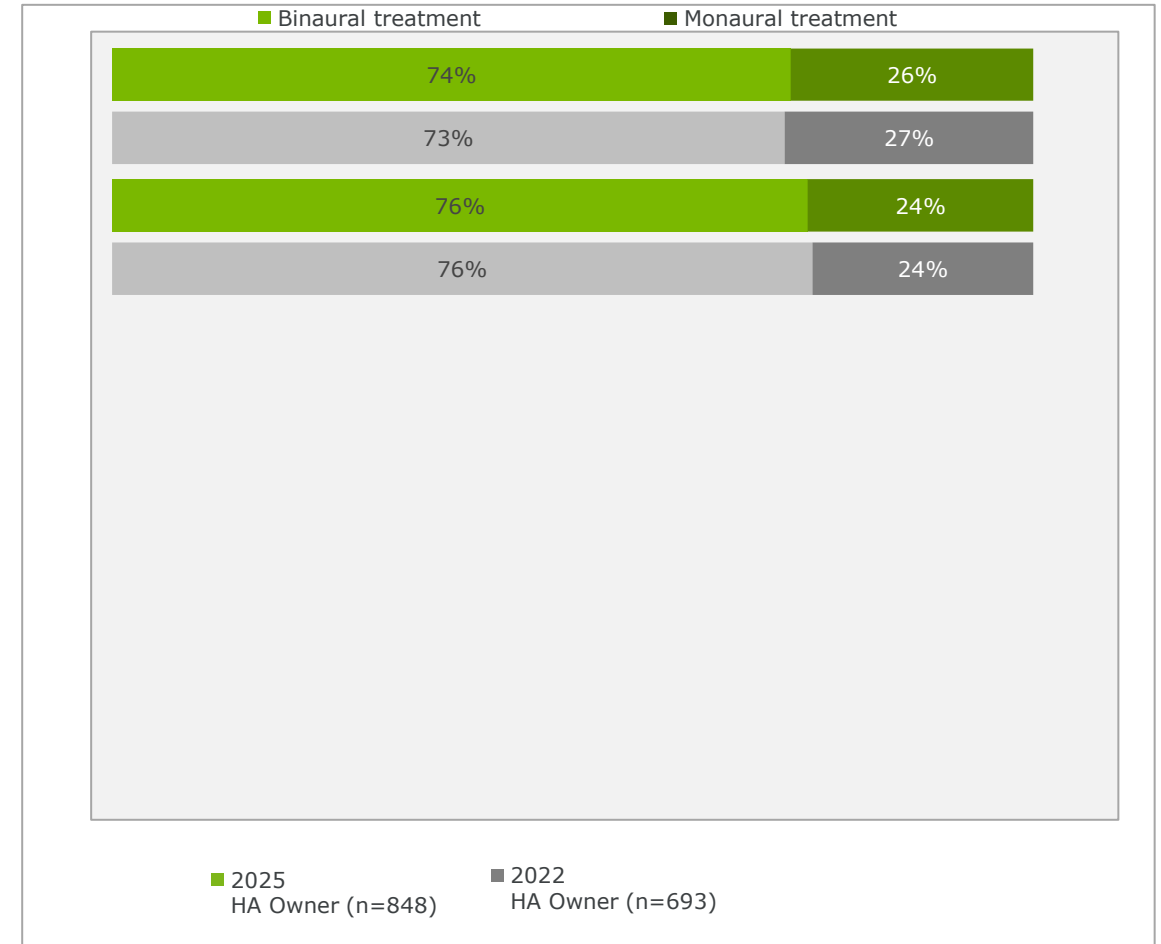
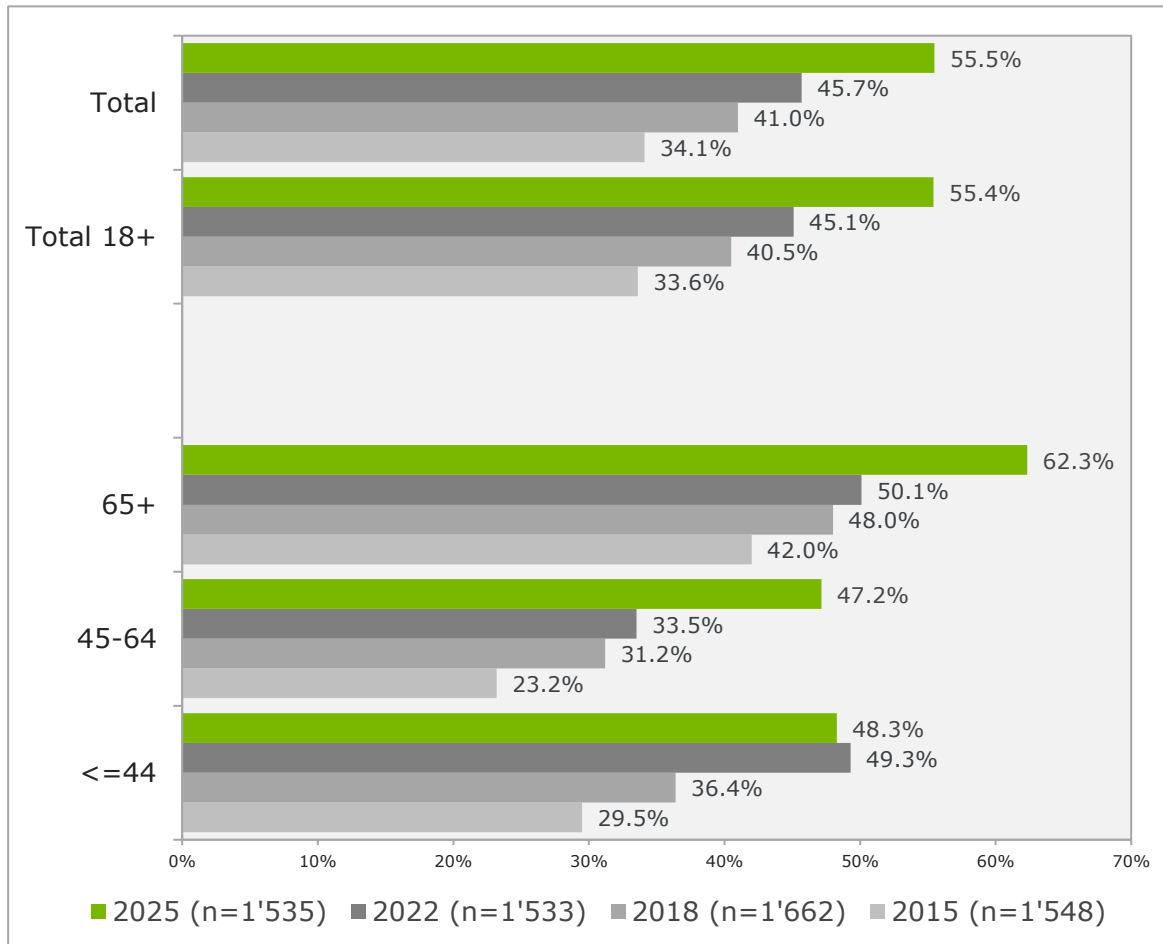
Self-declared hearing loss

% hearing loss prevalence

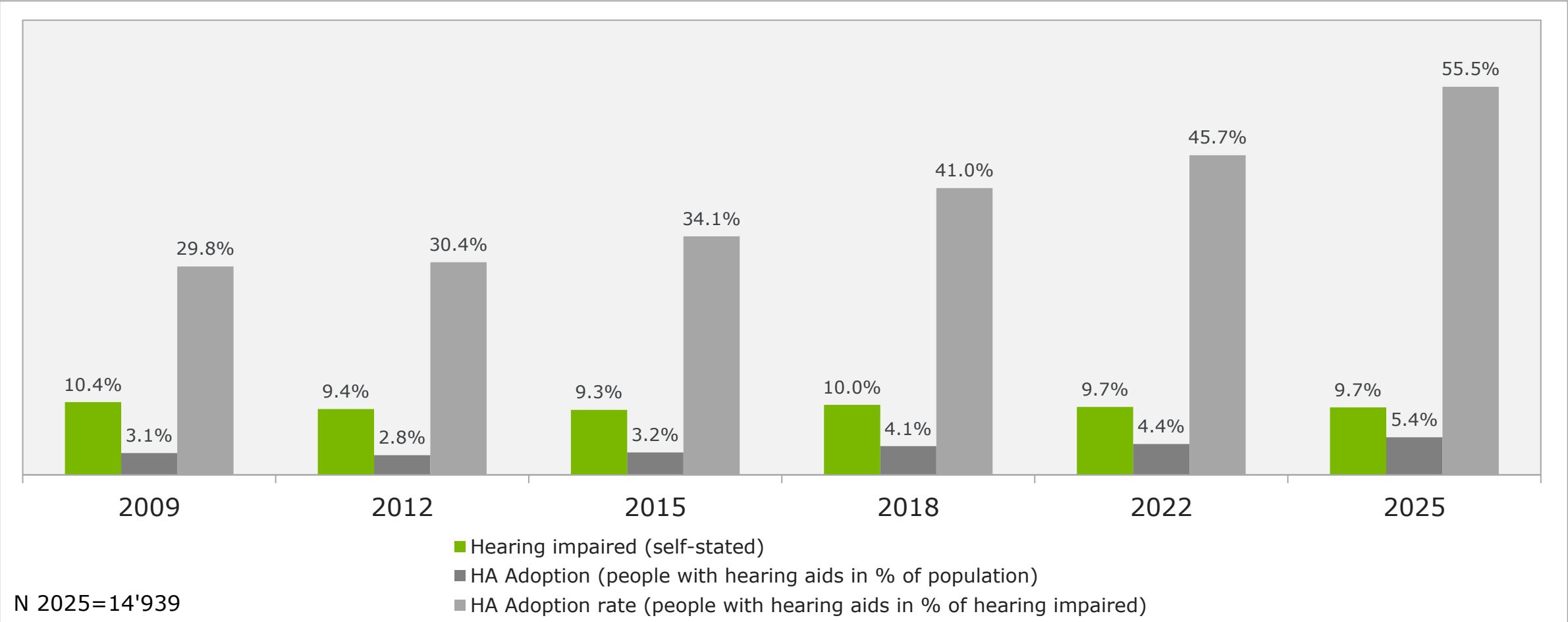


Hearing aid adoption rate: 55% of the hearing impaired have hearing aid(s), and 74% of them have binaural treatment

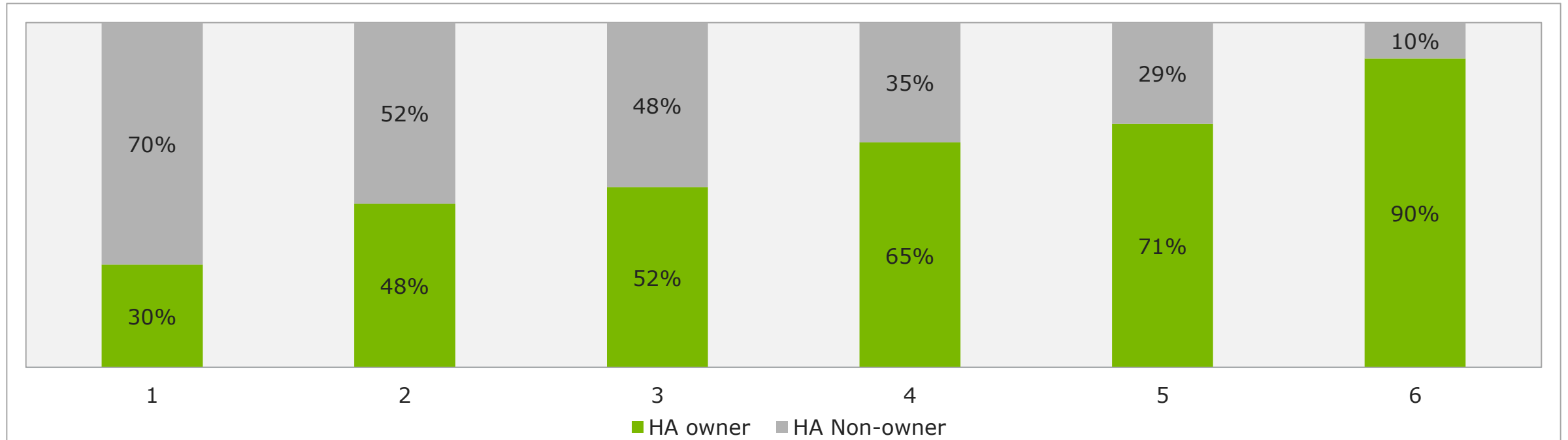
% of hearing impaired



Overview of hearing loss prevalence and hearing aid adoption



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 Non-owner n=599
HA Owner n=705

Hearing loss

Hearing loss characteristics: Owners compared to non-owners

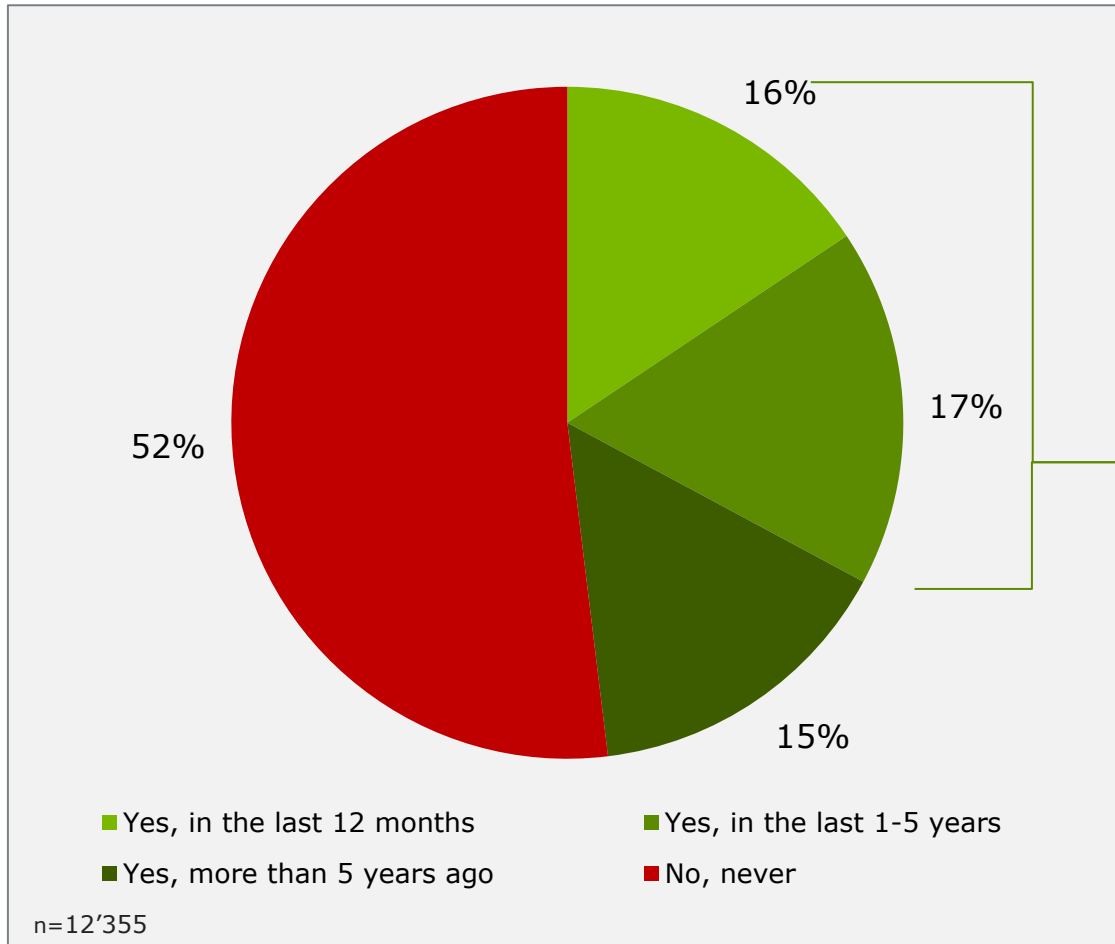
	HA Non-owner n=599	HA Owner n=705	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	39%	22%	44%
Bilateral loss	61%	78%	64%
Perceived loss			
Mild	24%	8%	31%
Moderate	61%	55%	53%
Severe	12%	33%	76%*
Profound	3%	4%	

* combined “severe” and “profound” because n is too small

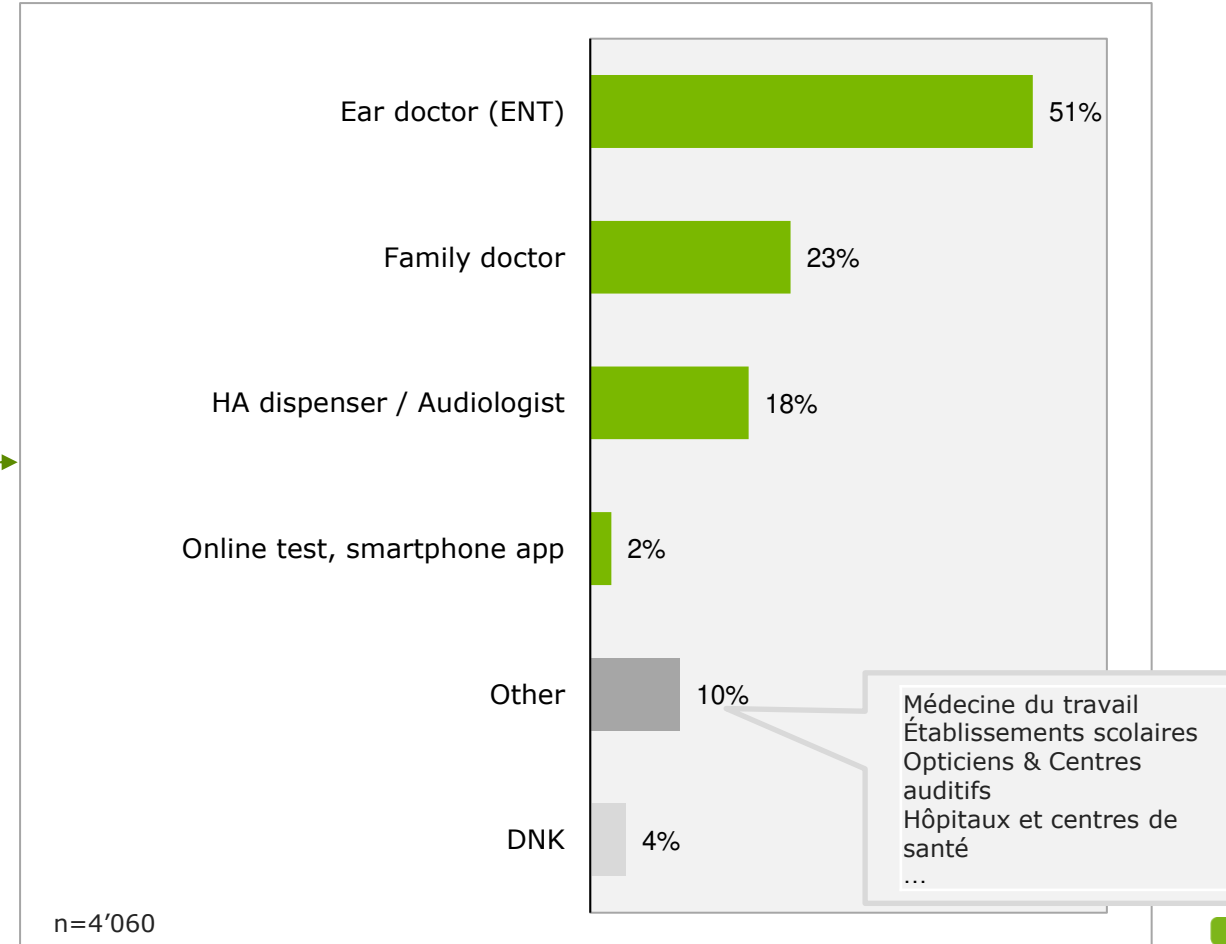
Hearing tests and where hearing is tested

Hearing Tests: 33% had a hearing test in the last five years, most tests done by ENTs

Have you ever taken a hearing test?



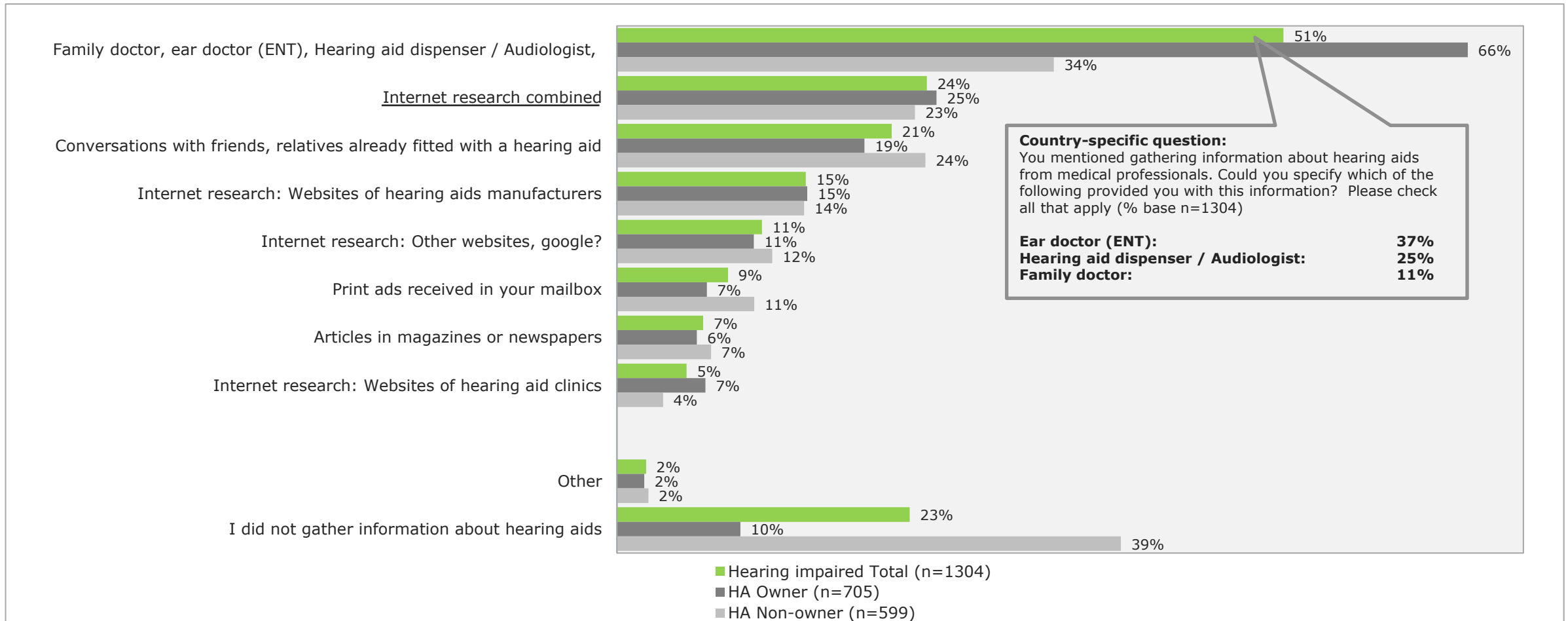
Where/how was your hearing tested?



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

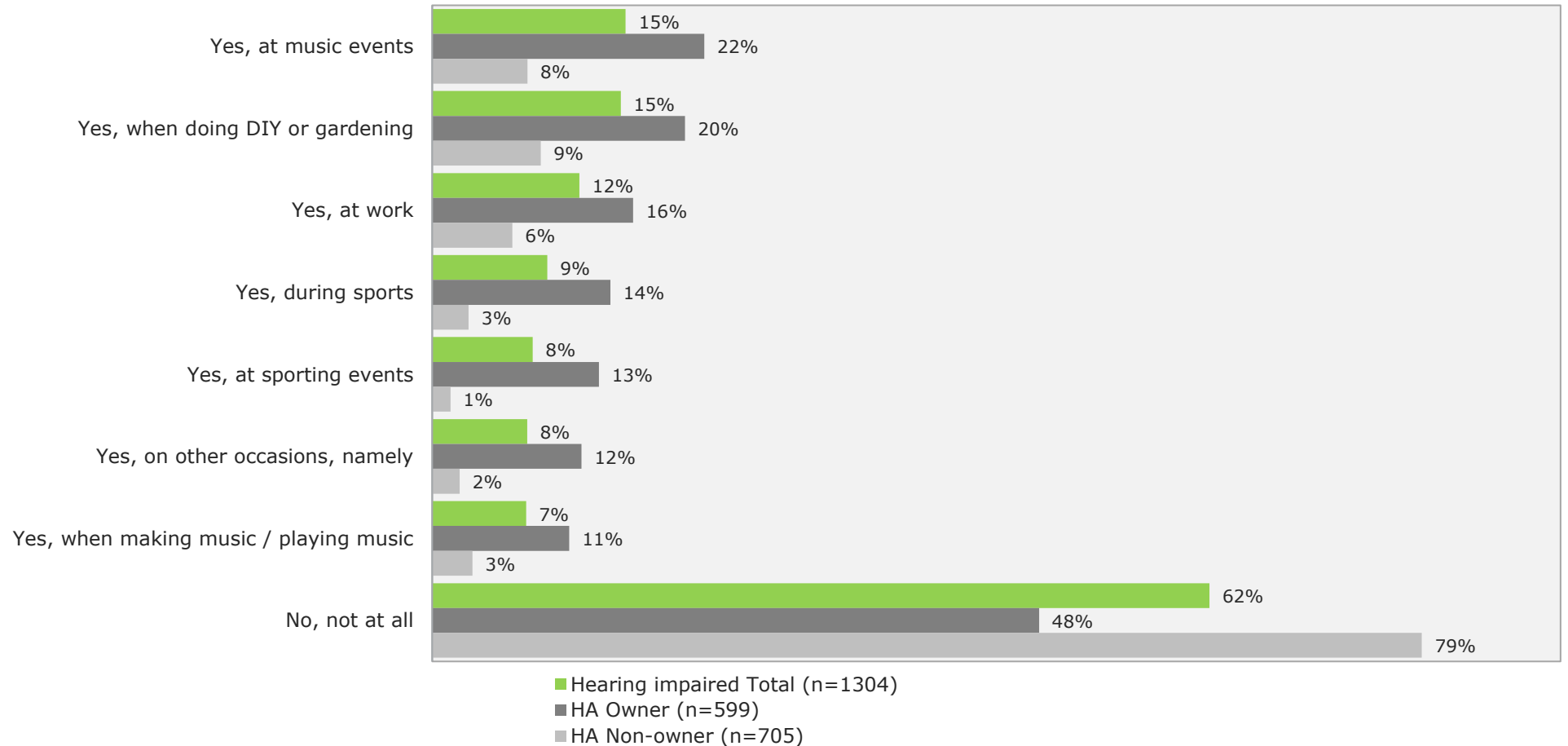
Doctors and HCPs are the most important sources of information and therefore, the major gatekeepers – followed by internet research and other people with hearing aids

Where did you gather information about hearing aids?

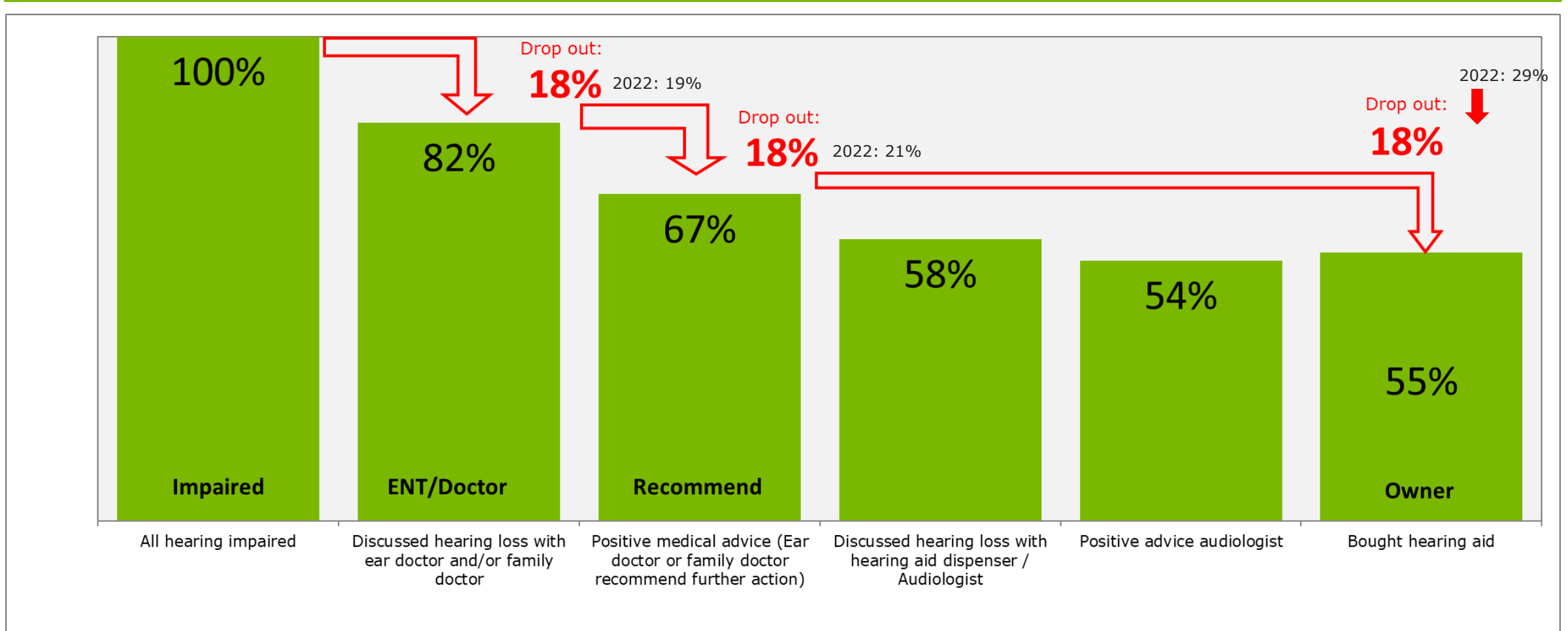


Usage of hearing protection by hearing impaired

Do you use hearing protection at least occasionally?

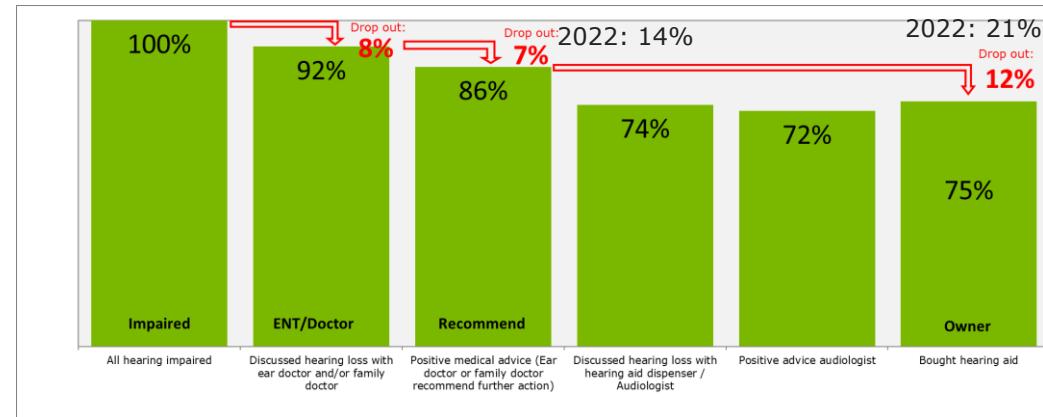


The route to the hearing aid

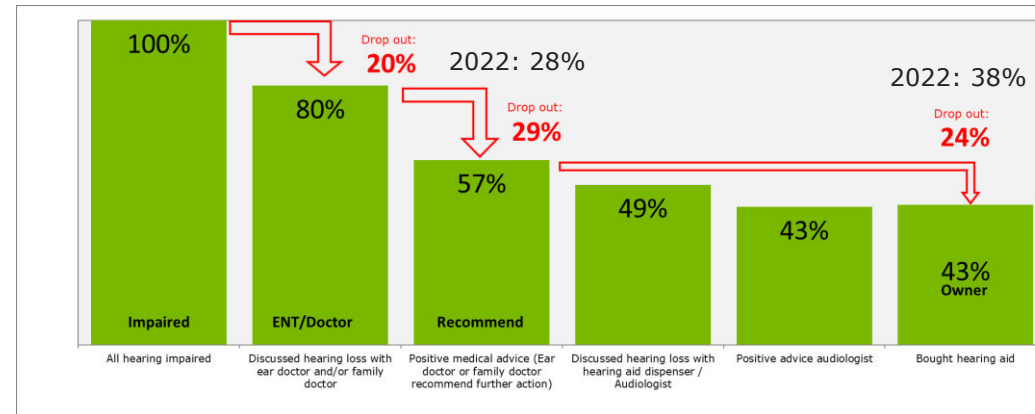


Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*



Low 50% hearing loss*



Dropout rates following medical recommendations are typically lower than 22, and individuals with more severe hearing loss tend to receive additional medical recommendations.

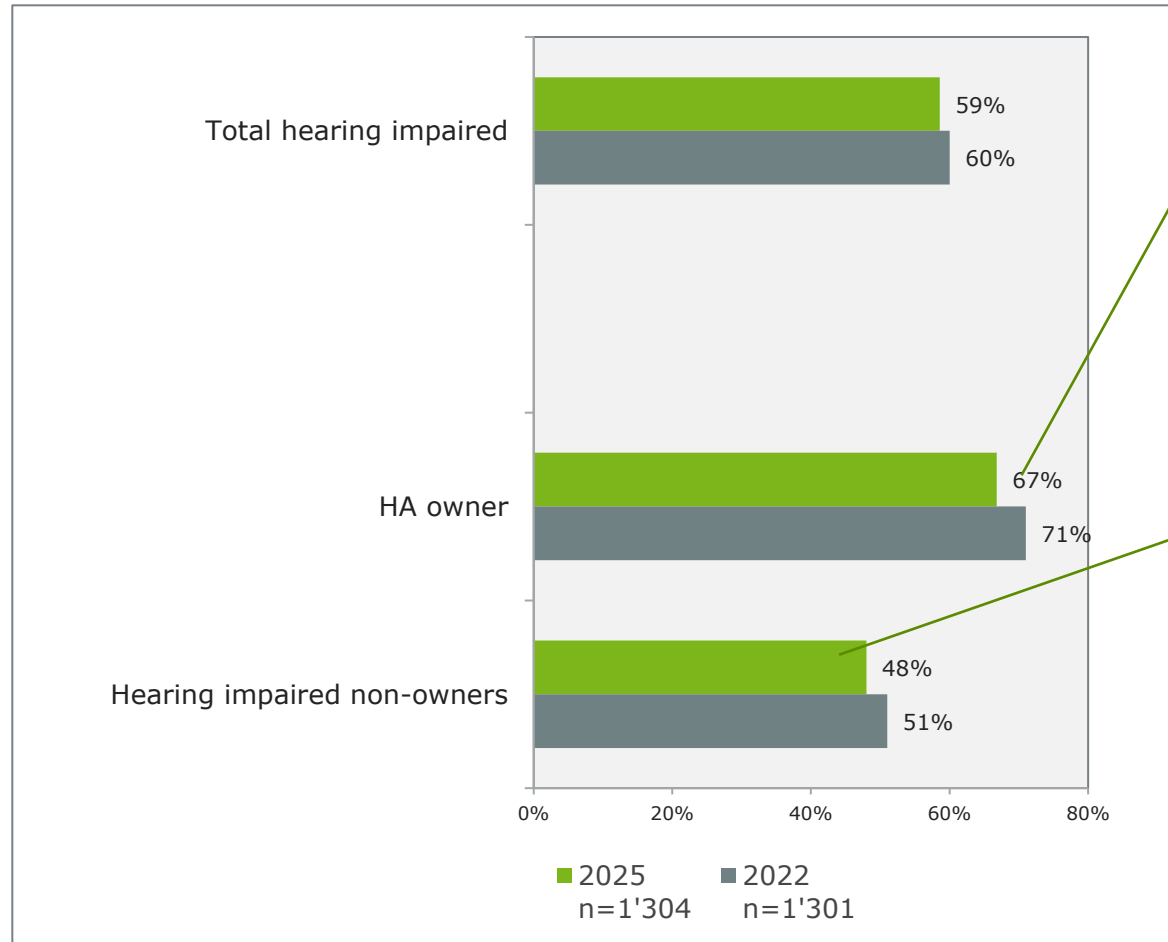
* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- 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

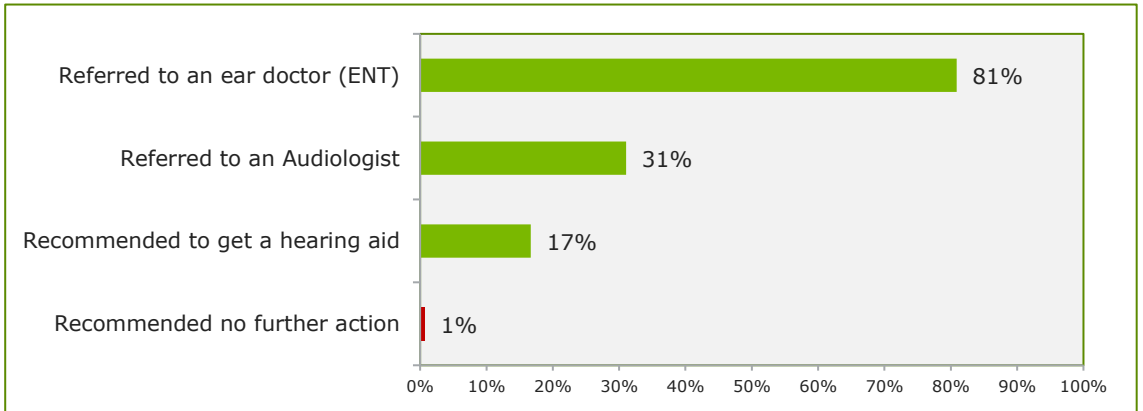
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

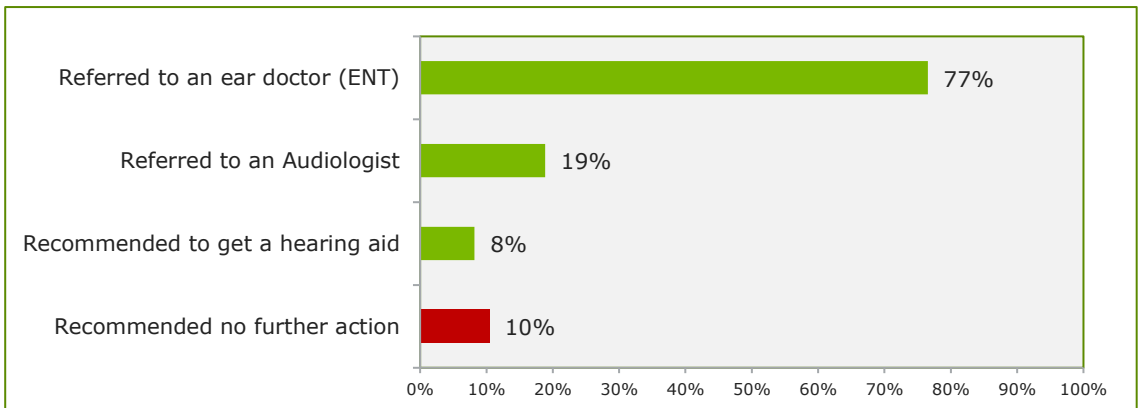


What did he/she recommend ?

HA Owner (n=466)



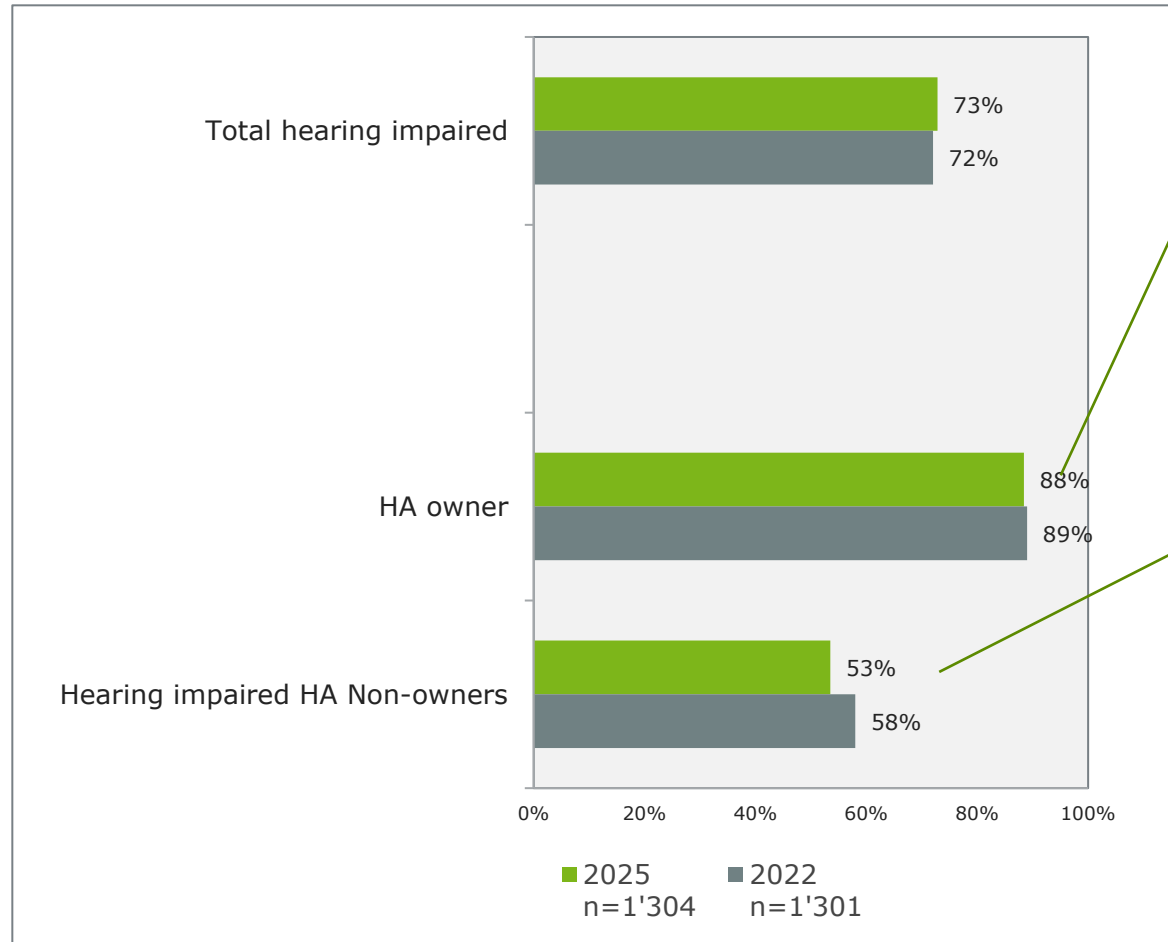
Impaired HA Non-owner (n=275)



The route to the hearing aid: ENT

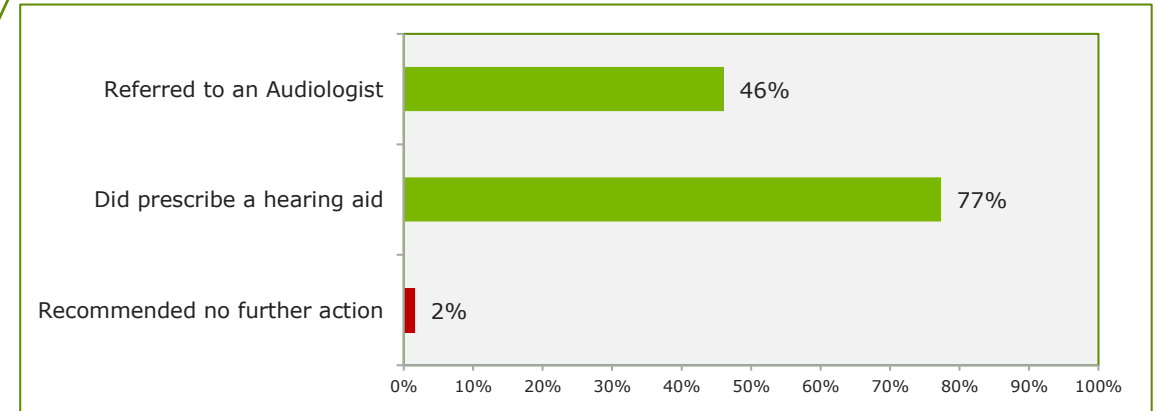
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

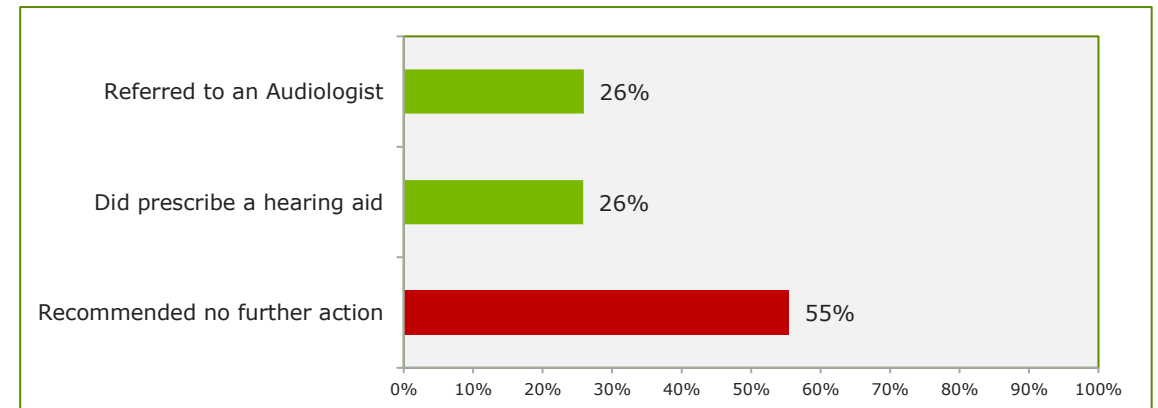


What did he/she recommend ?

HA Owner (n=610)

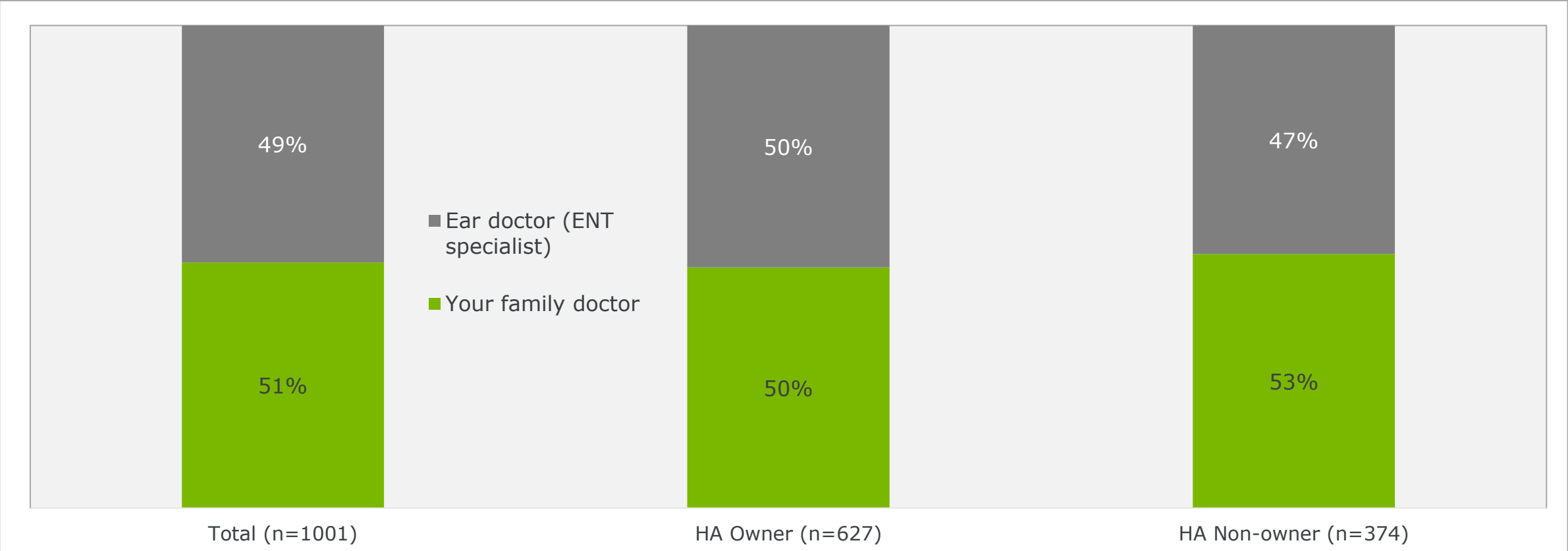


Impaired HA Non-owner (n=308)



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

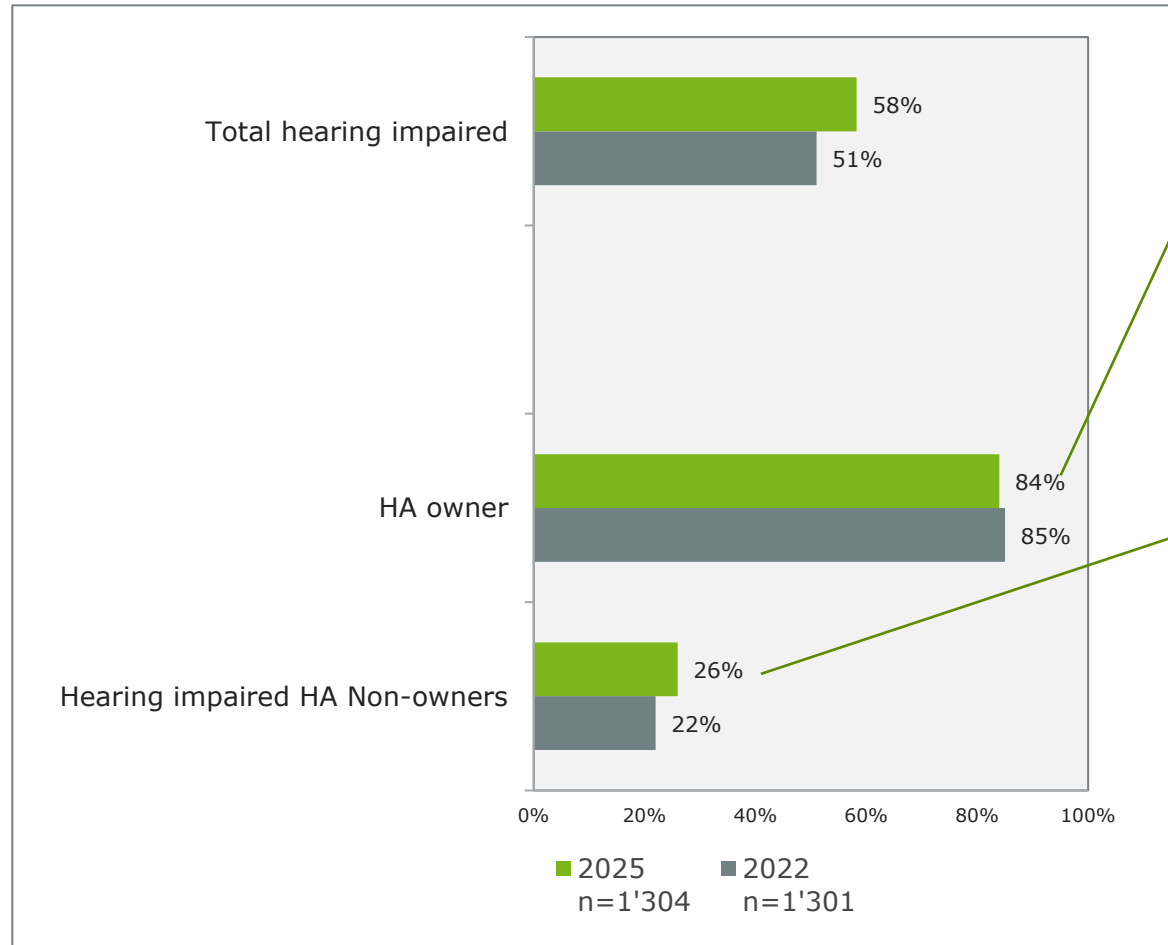
Those who discussed hearing loss with family doctor and/or ENT:
Who was the doctor you discussed your hearing loss with for the **first time** – your family doctor or the Ear, Nose and Throat specialist (ENT)?



The route to the hearing aid: Audiologist

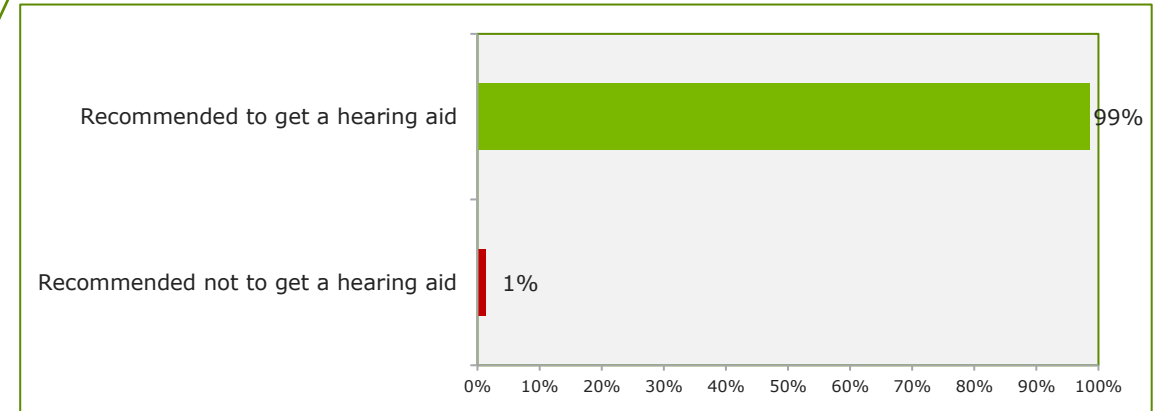
Have you ever discussed your hearing problem with an Audiologist?

% Discussed with Audiologist

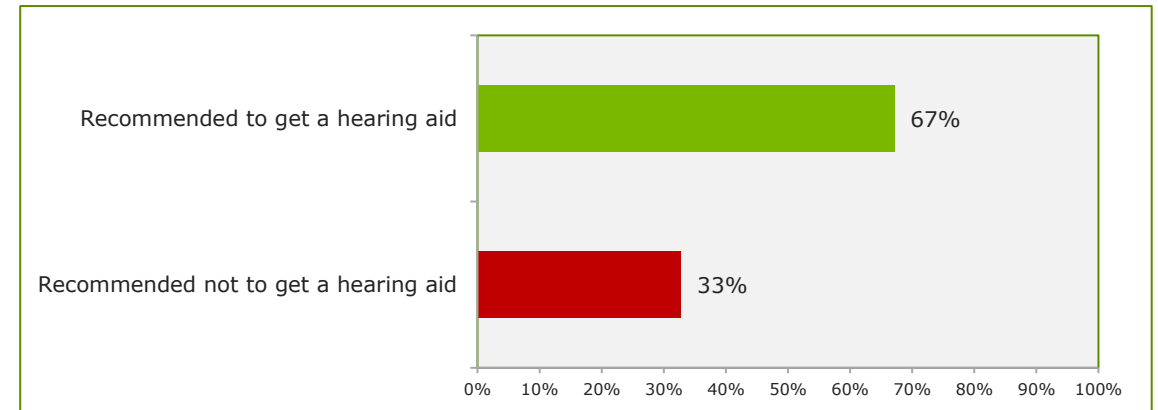


What did he/she recommend ?

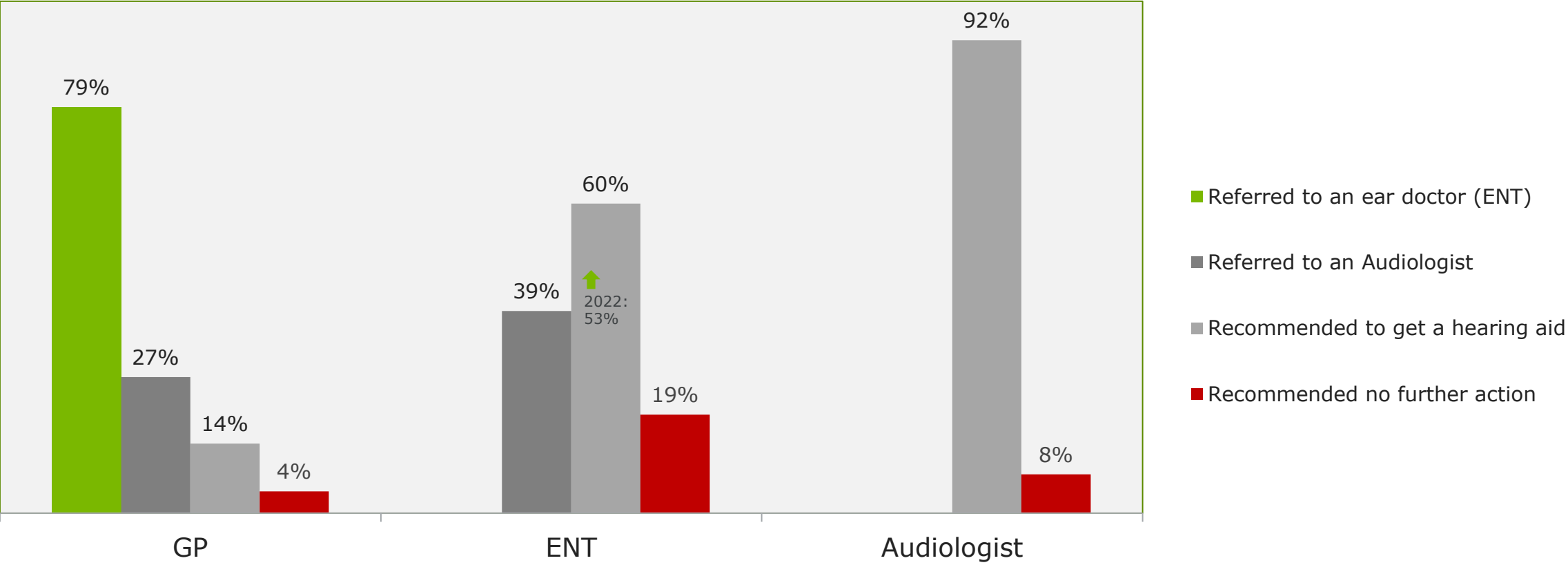
HA Owner (n=586)



Impaired HA Non-owner (n=154)



Recommendations by profession



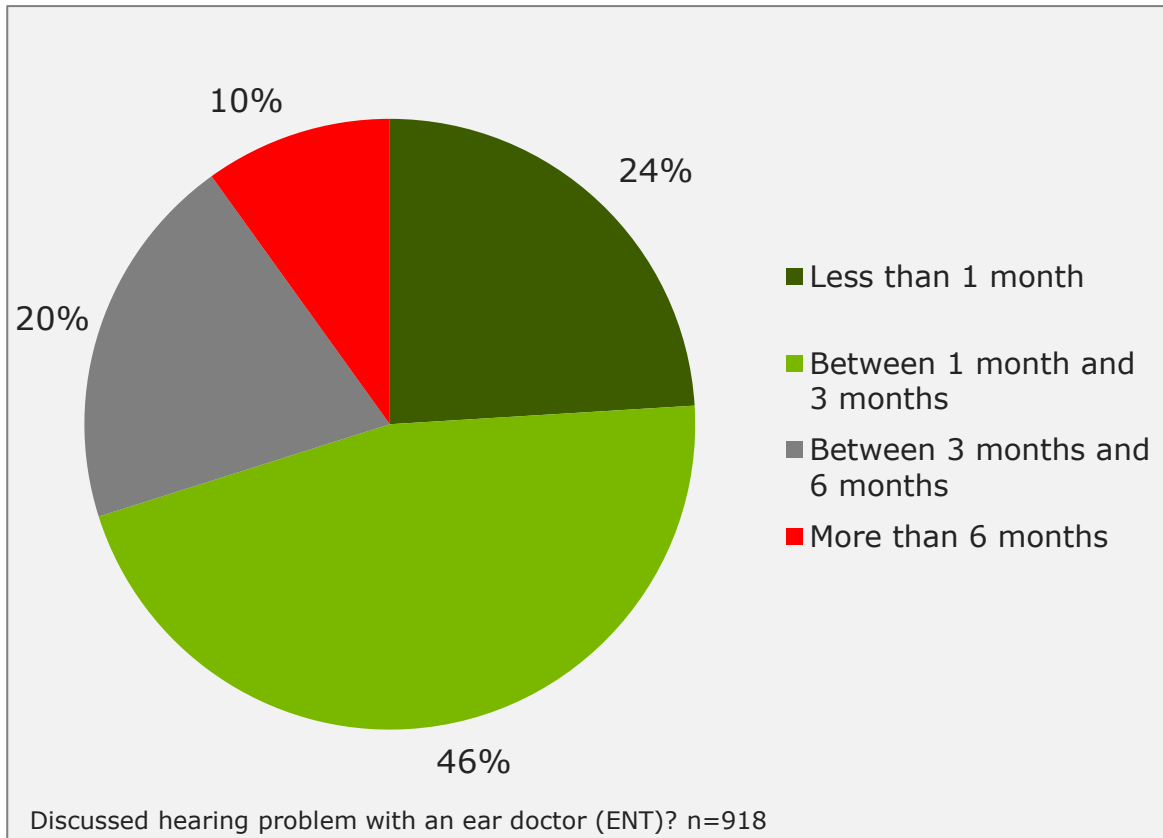
Sums can add to more than 100% (multiple responses)

GP n=741
ENT n=918
HA Dispenser n=740

Mostly, it takes 1-3 months to get an ENT appointment -it takes mostly 10-30 minutes to get there

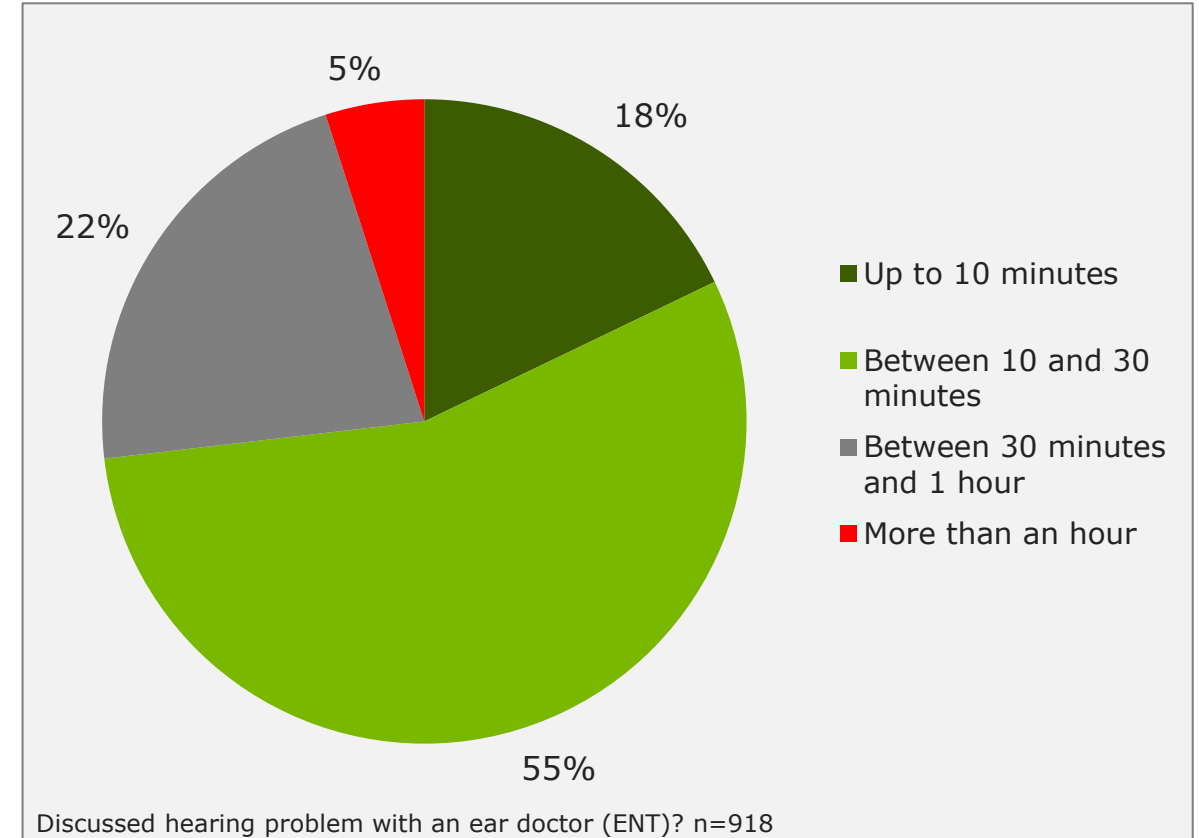
Discussed hearing problem with ENT:

How quickly could you get an appointment with an ENT doctor?



Discussed hearing problem with ENT:

How long did it take you to get to your ENT doctor?

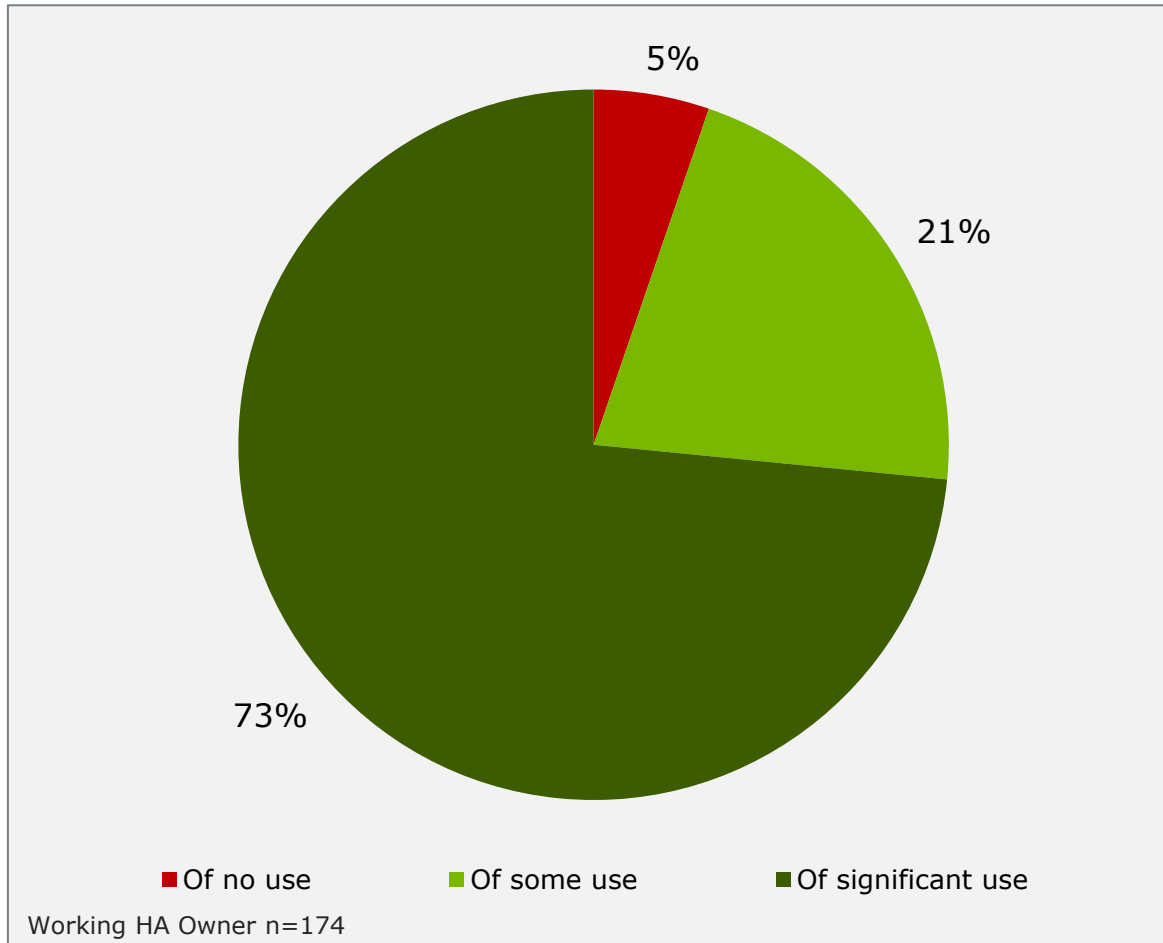


Potential social cost-savings due to the use of hearing aids:

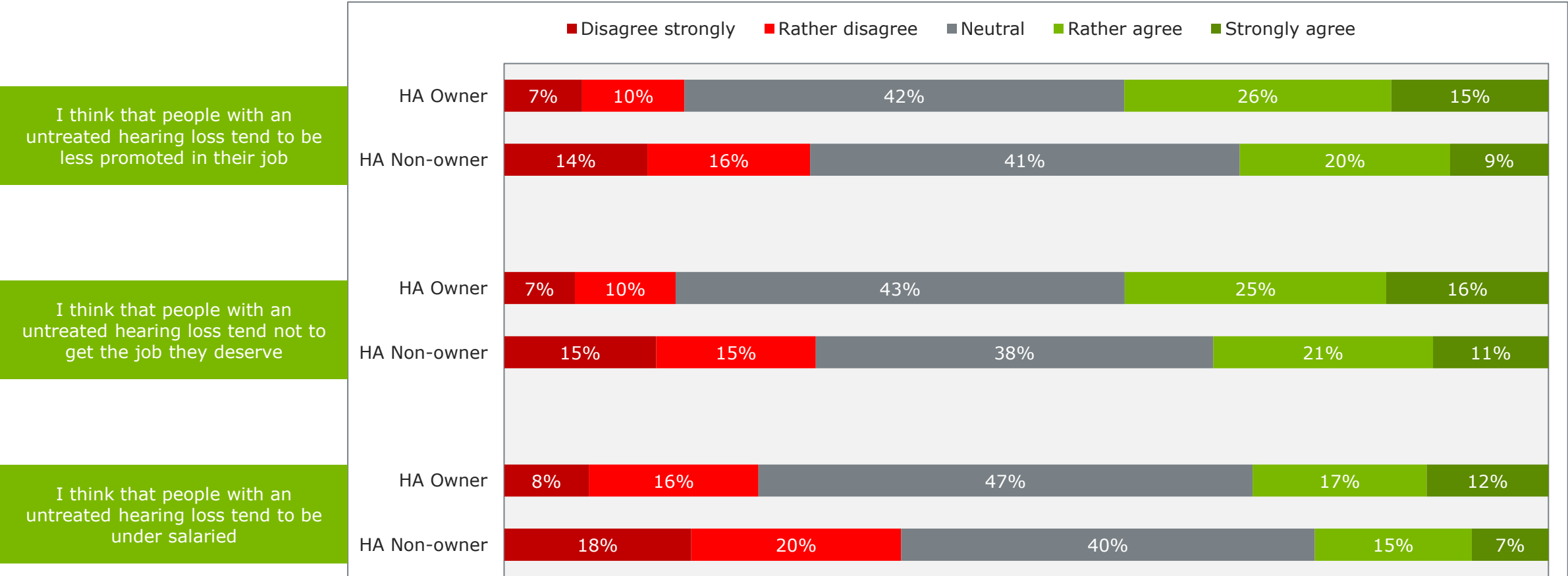
Work competitiveness, depressive symptoms, sleep quality, co-morbidities

Work competitiveness: 95% of the working hearing aid owners state that their hearing aid(s) are useful on their job

How useful are your hearing aids on your job?



Work competitiveness: People with hearing aids recognize that hearing aids increase the chance of hearing impaired getting promoted, getting the right job and to get a higher salary



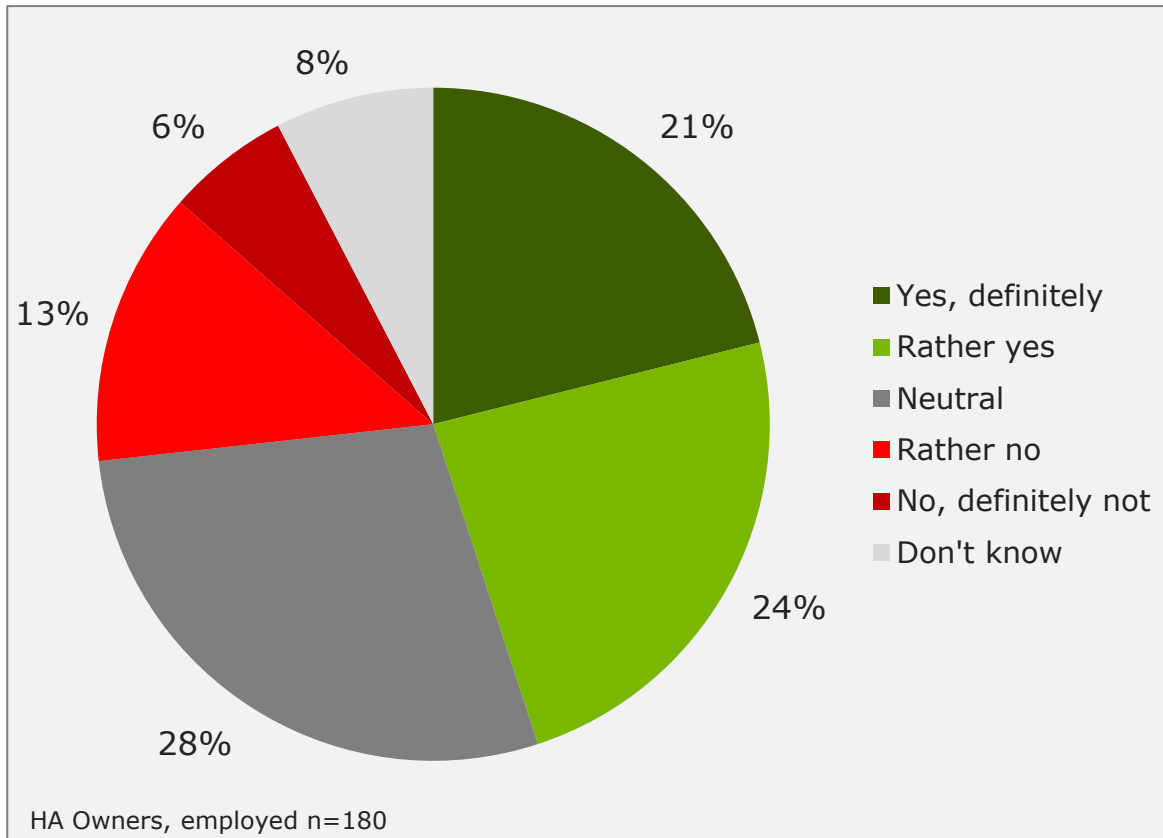
HA Owner n=498 / HA Non-owner n=448



45% of employed individuals using hearing aids believe the devices enable them to work longer

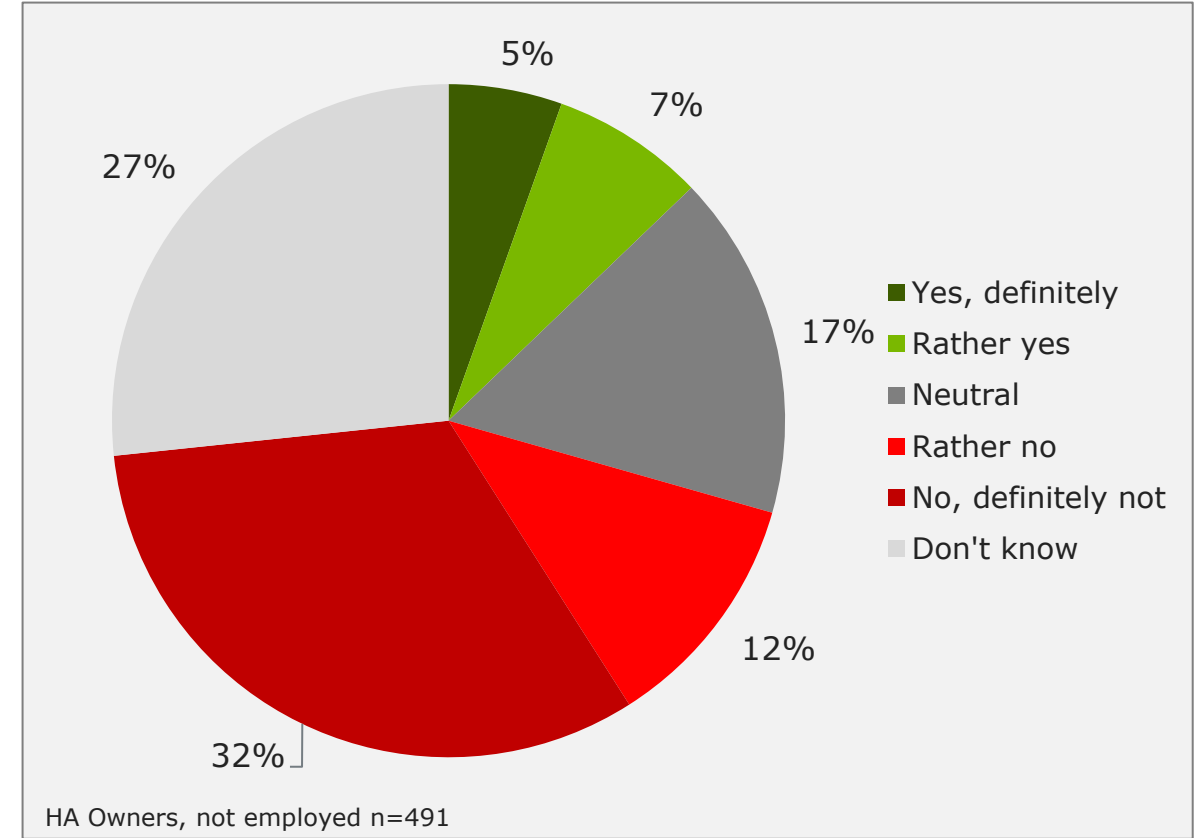
HA Owners, employed:

Do you believe that due to your hearing aid provision you can be employed longer than without hearing aid(s)?



HA Owners, NOT employed :

Do you believe that due to your hearing aid provision you could have been employed longer than without hearing aid(s)?

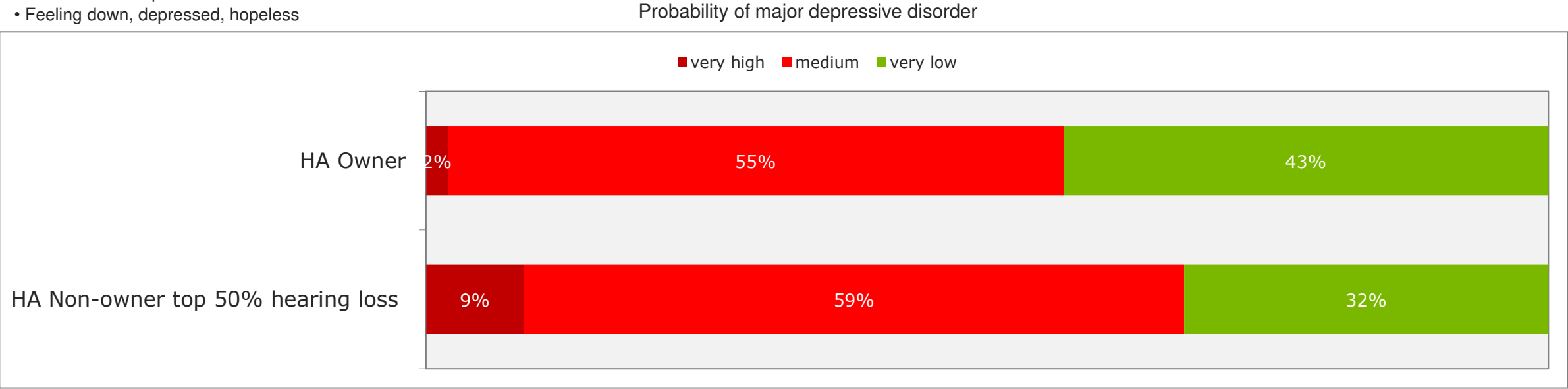


General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*)

Depression symptoms:
PHQ-2 Screening:

In the last 2 weeks:

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



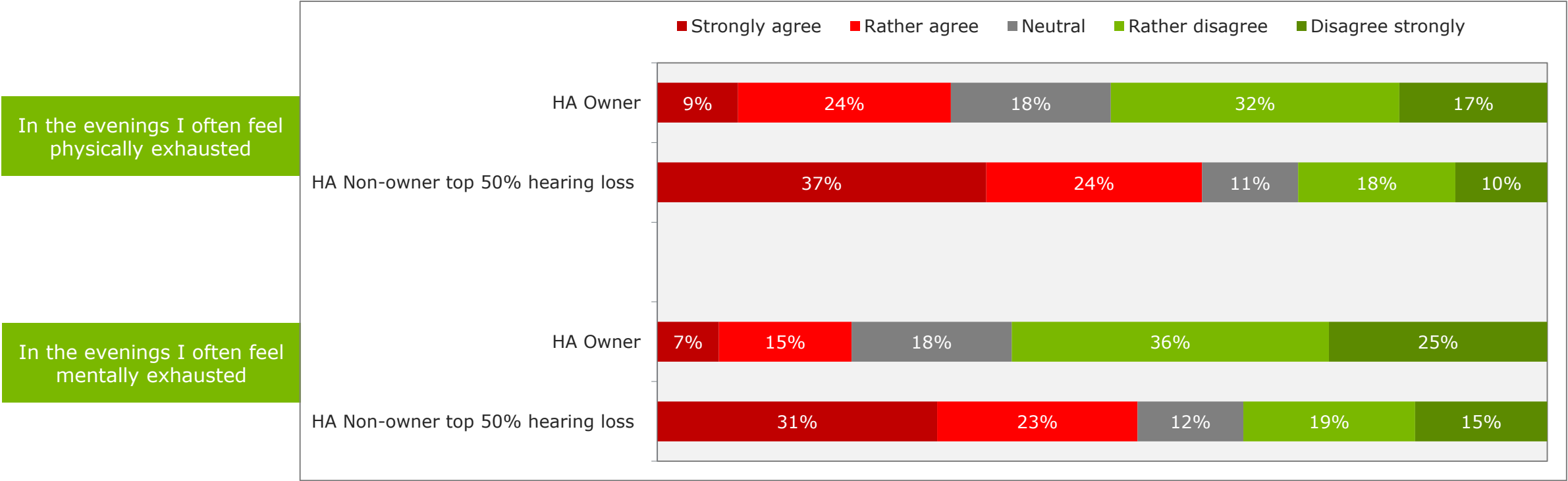
HA owner n=487 / HA Non-owner top 50% hearing loss n=111

*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



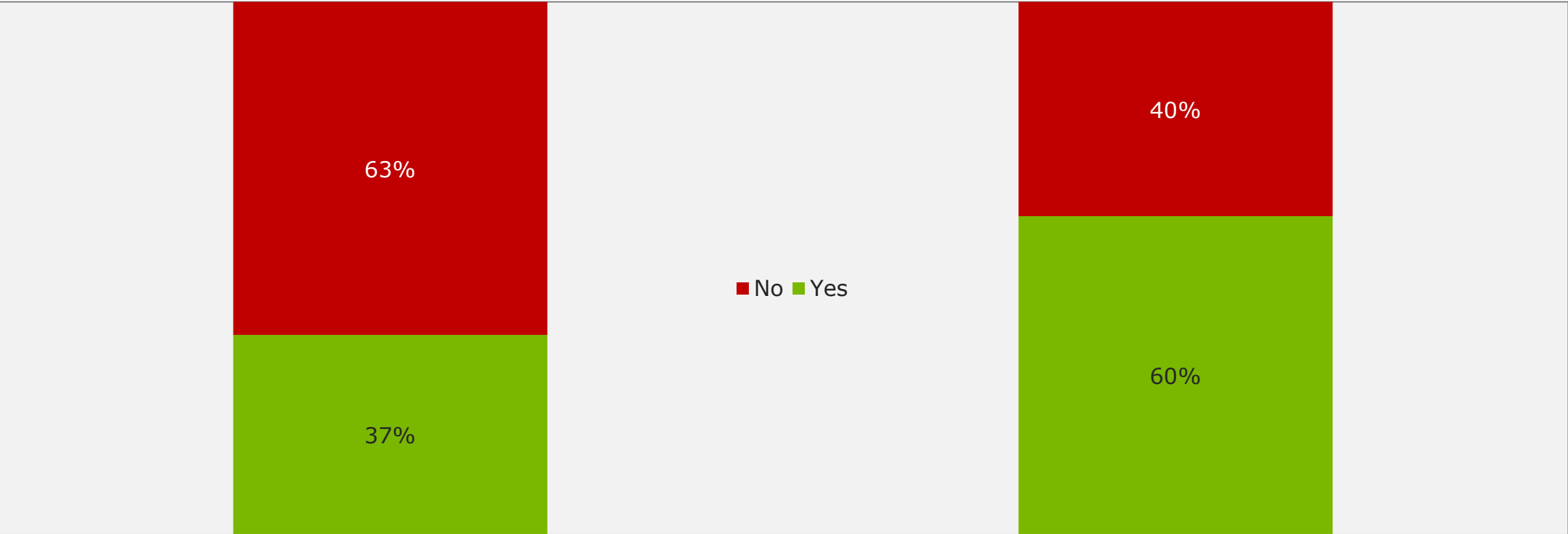
HA Owner n=474 / HA Non-owner top 50% hearing loss n=110

*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?



HA Non-owner, top 50% hearing loss

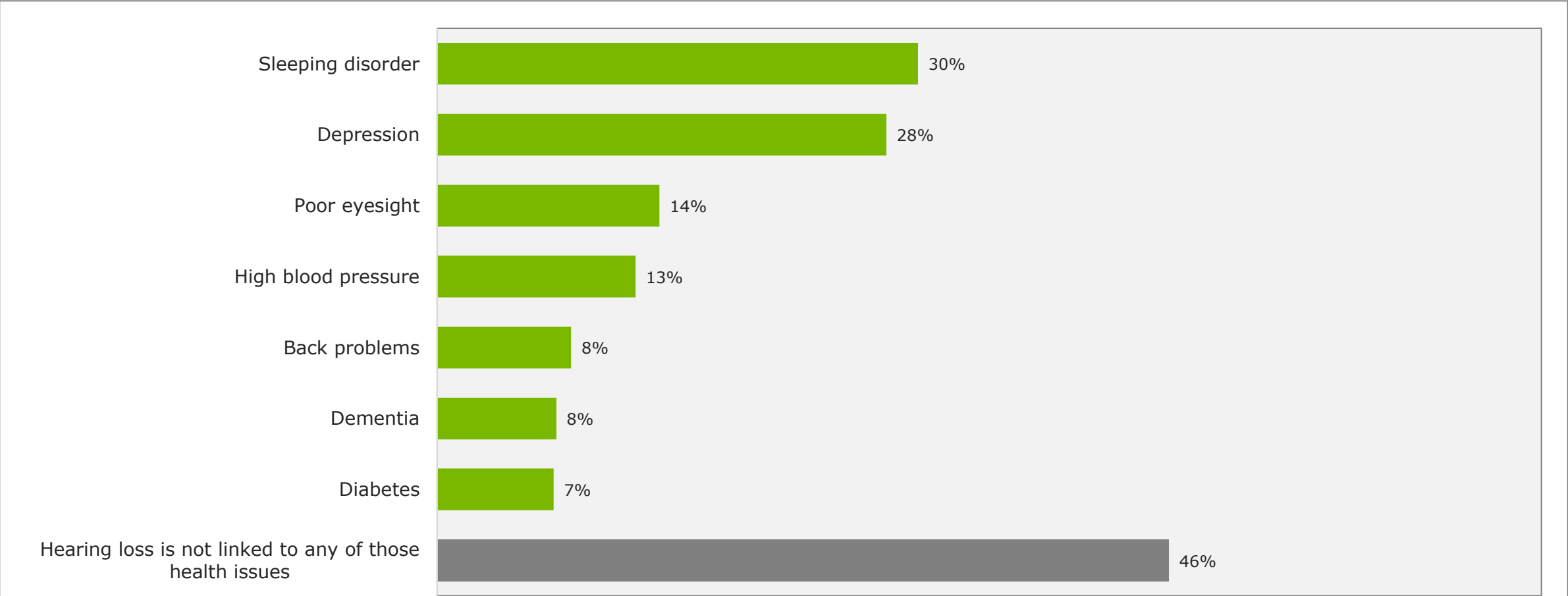
HA Owner

HA Non-owner top 50% hearing loss n=111 / HA Owner n=487



30% of all hearing-impaired think that hearing loss could be linked to sleeping disorder

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

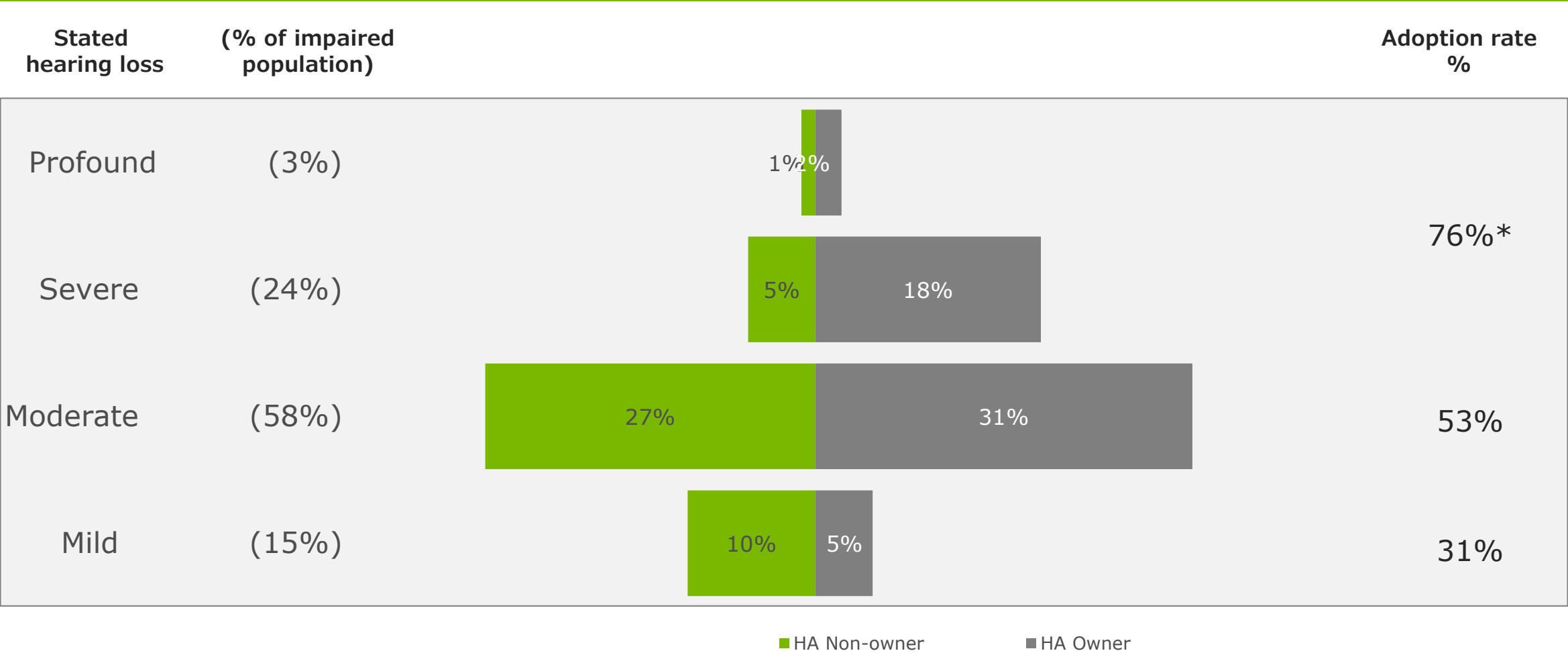


Hearing impaired, n=1'304

3. Analysis of hearing aid owners

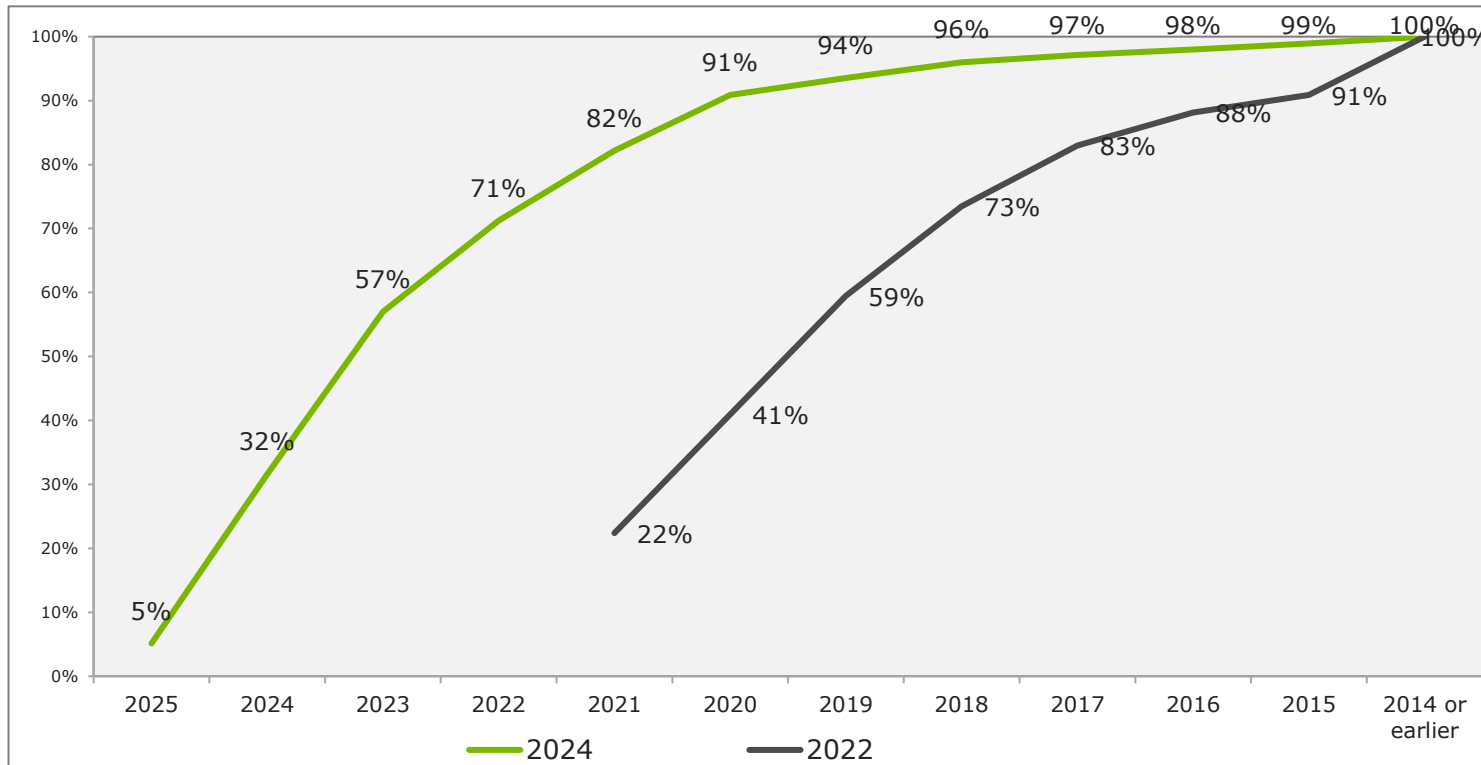
Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage

Low adoption rates within mild hearing loss



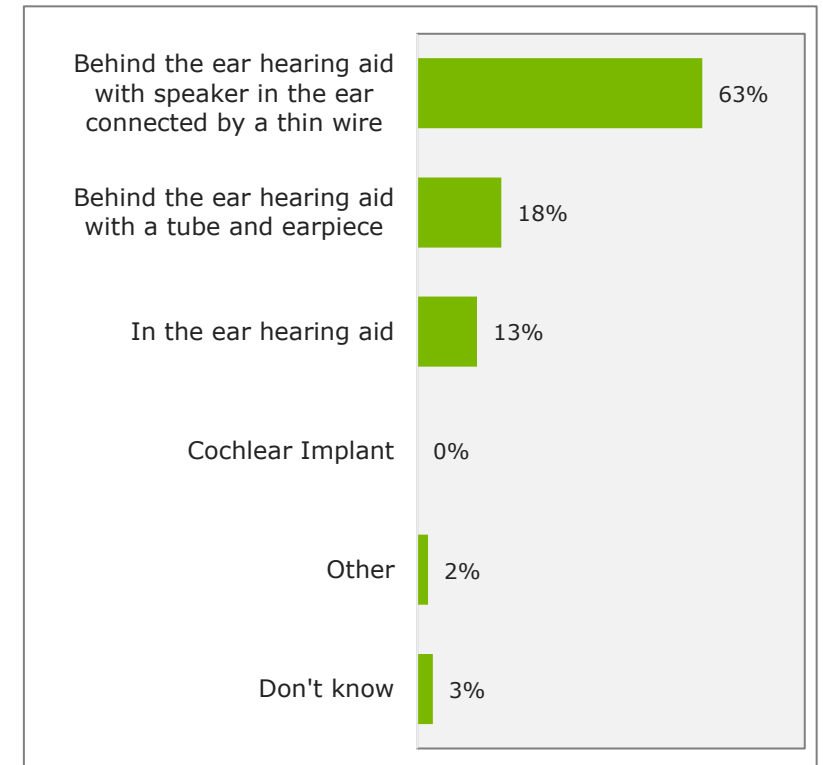
57% of the currently owned HAs were acquired in 2023 or later: RICs are the most often purchased type of HA

Year of purchase



Age of currently owned HAs (Mean):
2025: 2.9 years
2022: 3.0 years

Type of HA



81% of those who obtained hearing aids in 2020 or before have a plan to renew them

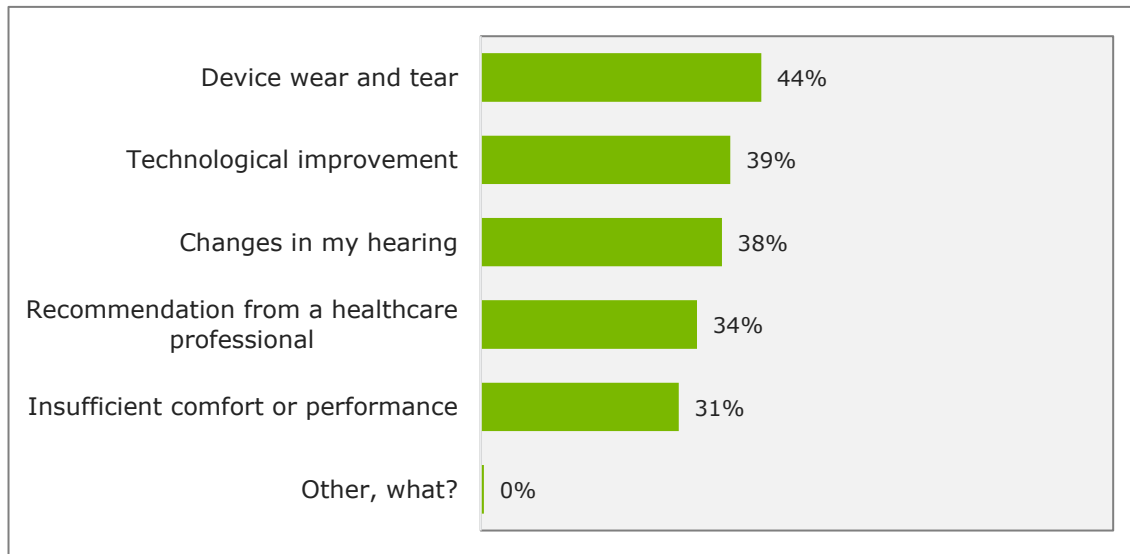
Are you considering renewing your hearing aids?



HA bought 2020 or earlier, n=122

If Yes:

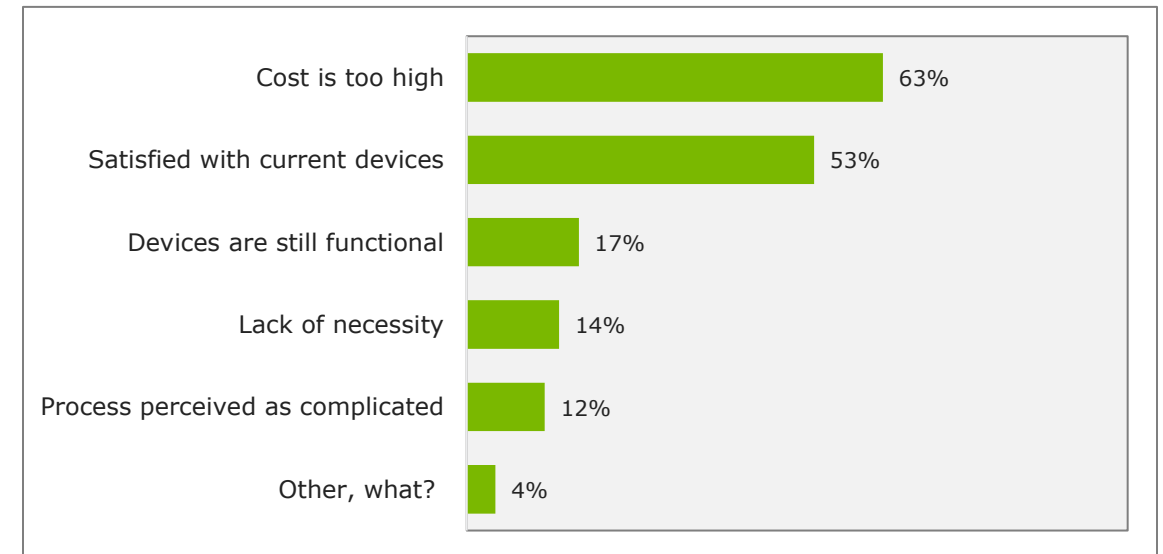
Why do you wish to renew them?



Bought 2020 or earlier and wish renew n=100

If Yes:

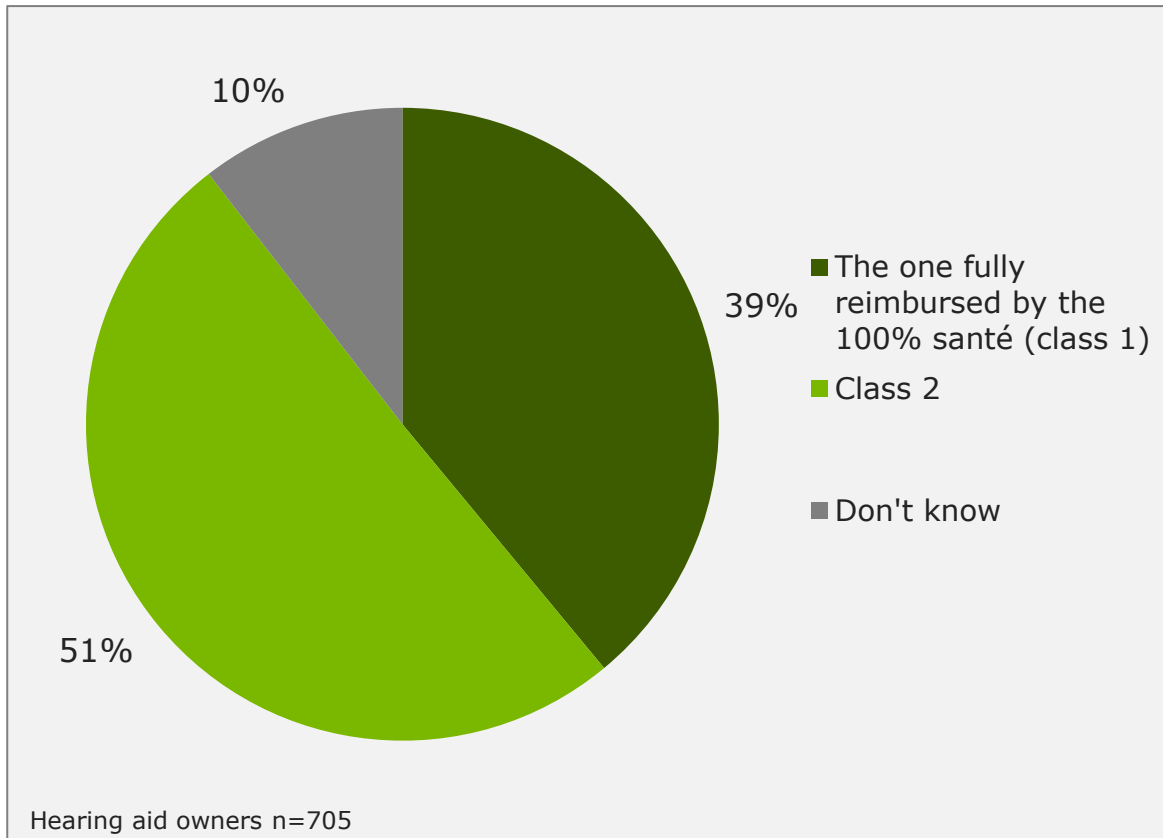
Why do you not wish to renew them?



Bought 2020 or earlier and wish not to renew n=22

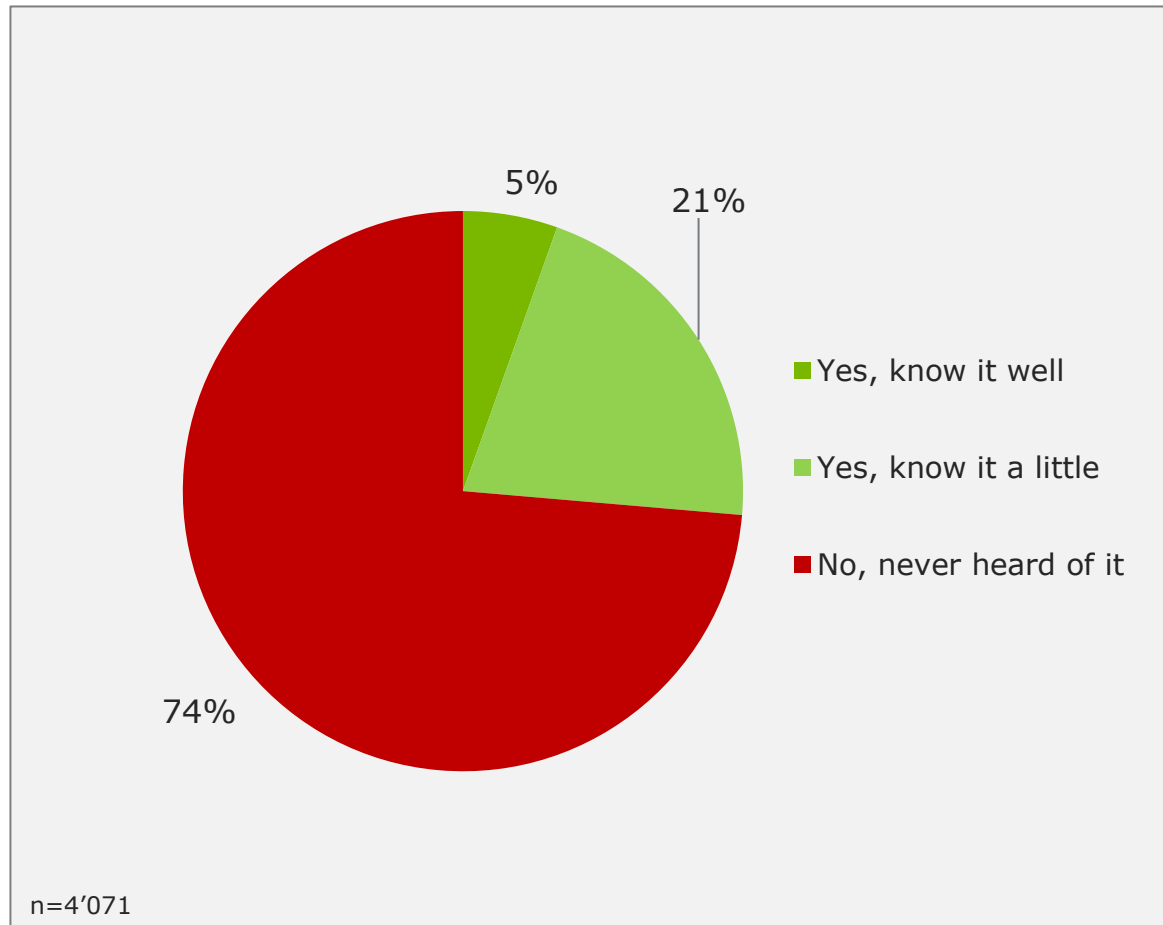
51% claim to have class 2 hearing aids

What type of hearing aid did you opt for?

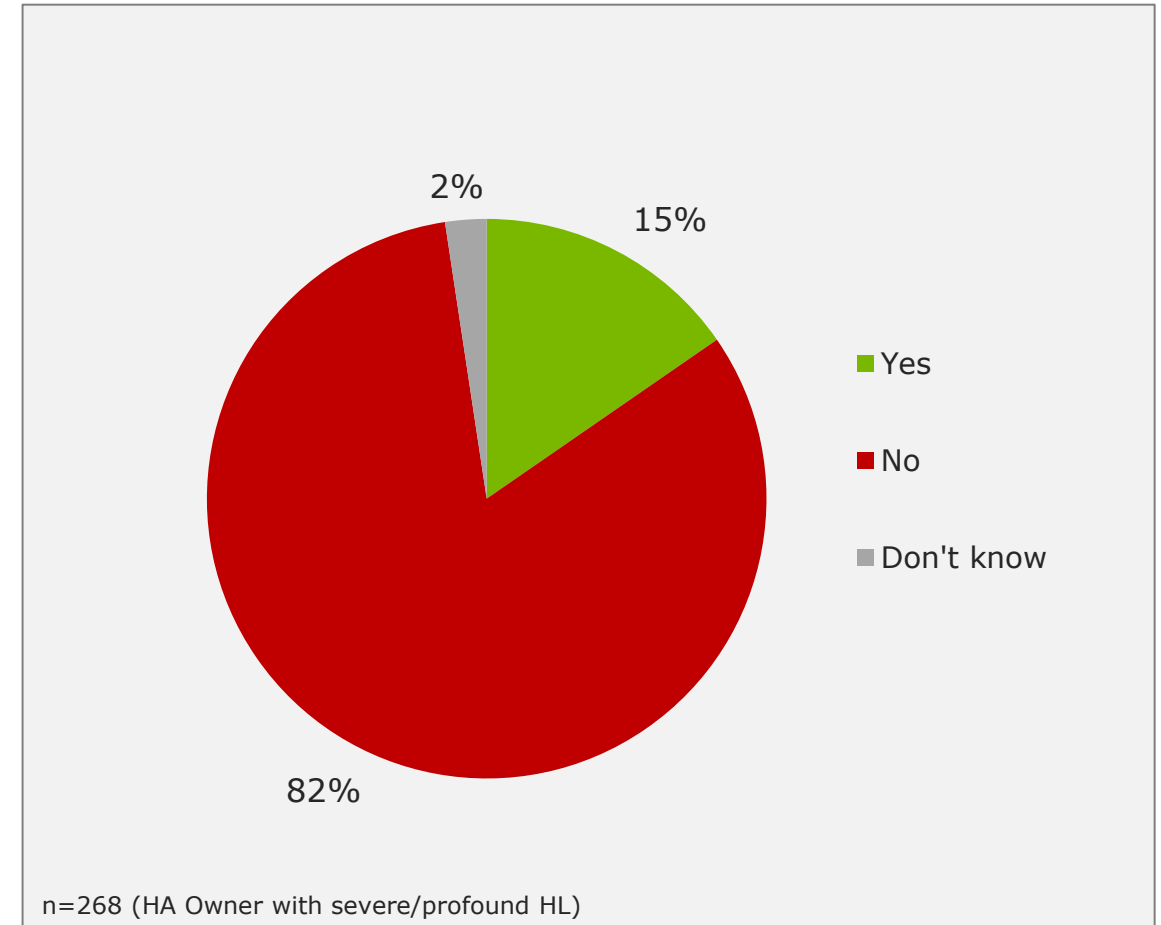


**74% of the population in FRA have never heard of Cochlear Implants.
15% of the HA owners with severe/profound HL have been informed about CIs by a medical professional**

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

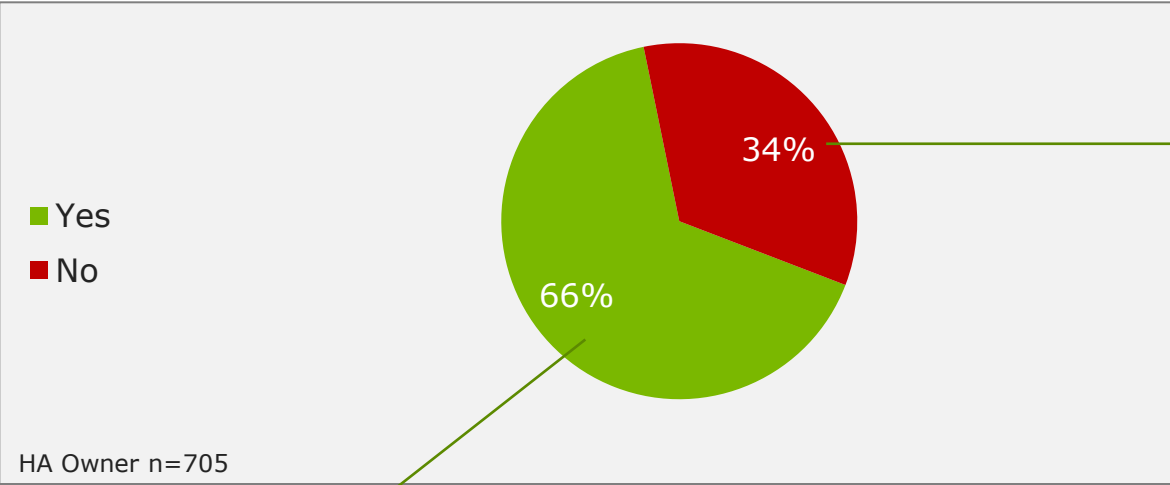


Have you been informed about cochlear implants by a medical professional?

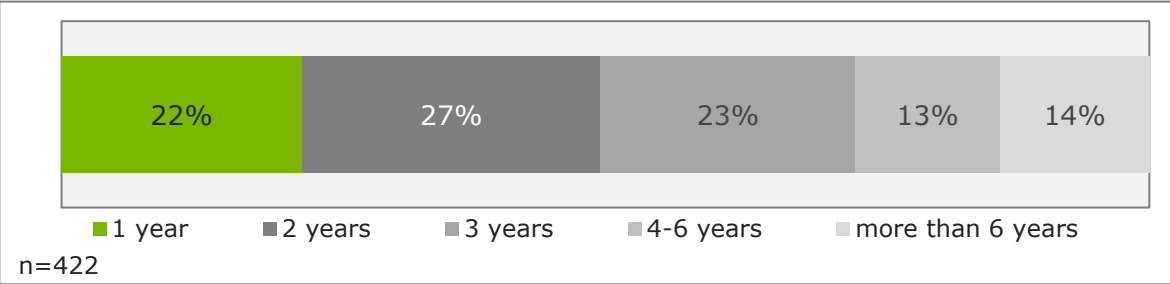


Hearing aids are typically used for five years before being replaced. Mostly, 2-3 years pass between becoming aware of hearing loss and purchasing hearing aids

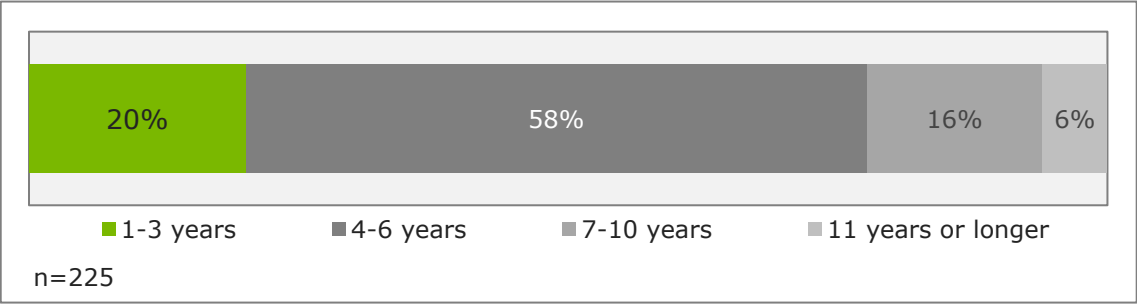
Current HAs = first HAs?



HA Owner (1st HA):
How many years have passed since you became aware of your hearing loss until you acquired a hearing aid?

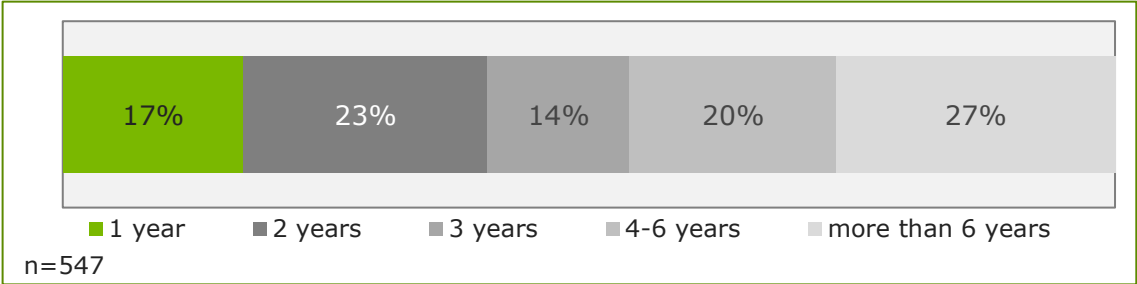


How many years did you own your previous HAs?



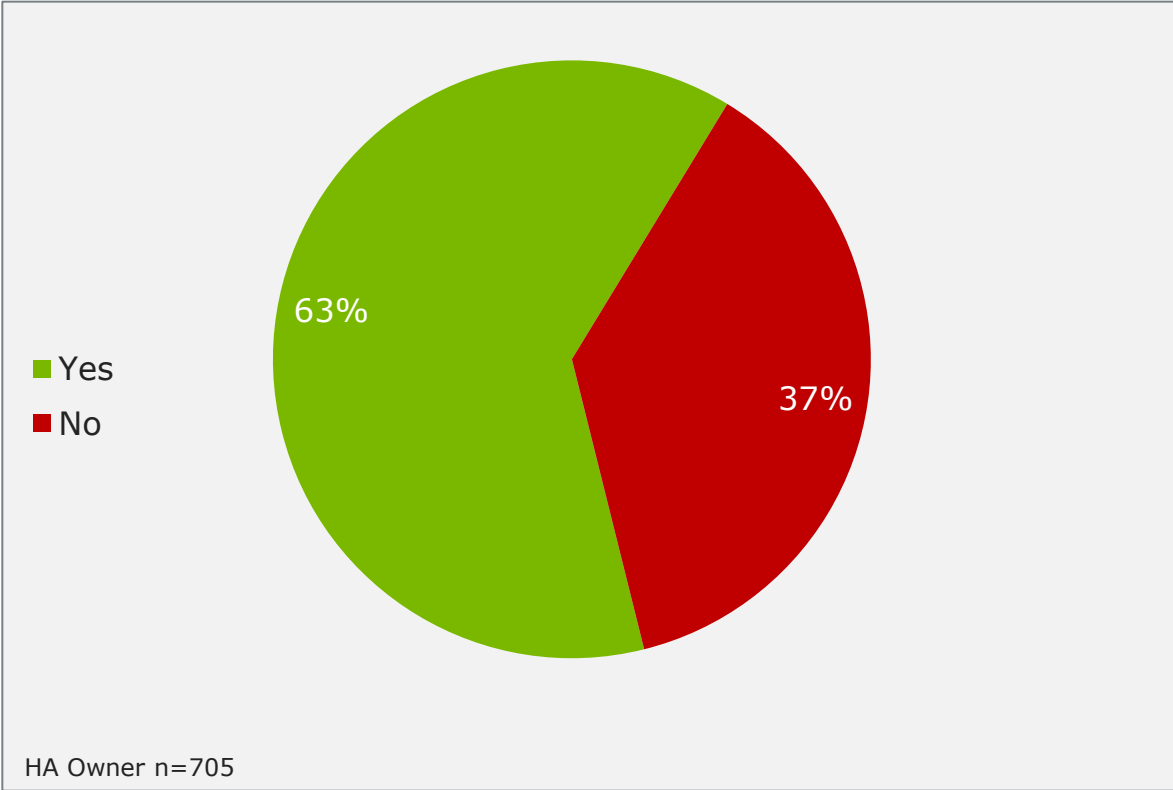
Age of HA before it has been replaced:
2025: 5 years (median)
2022: 5 years (median)

HA Non-owner:
How many years had passed since you became aware of your hearing loss?

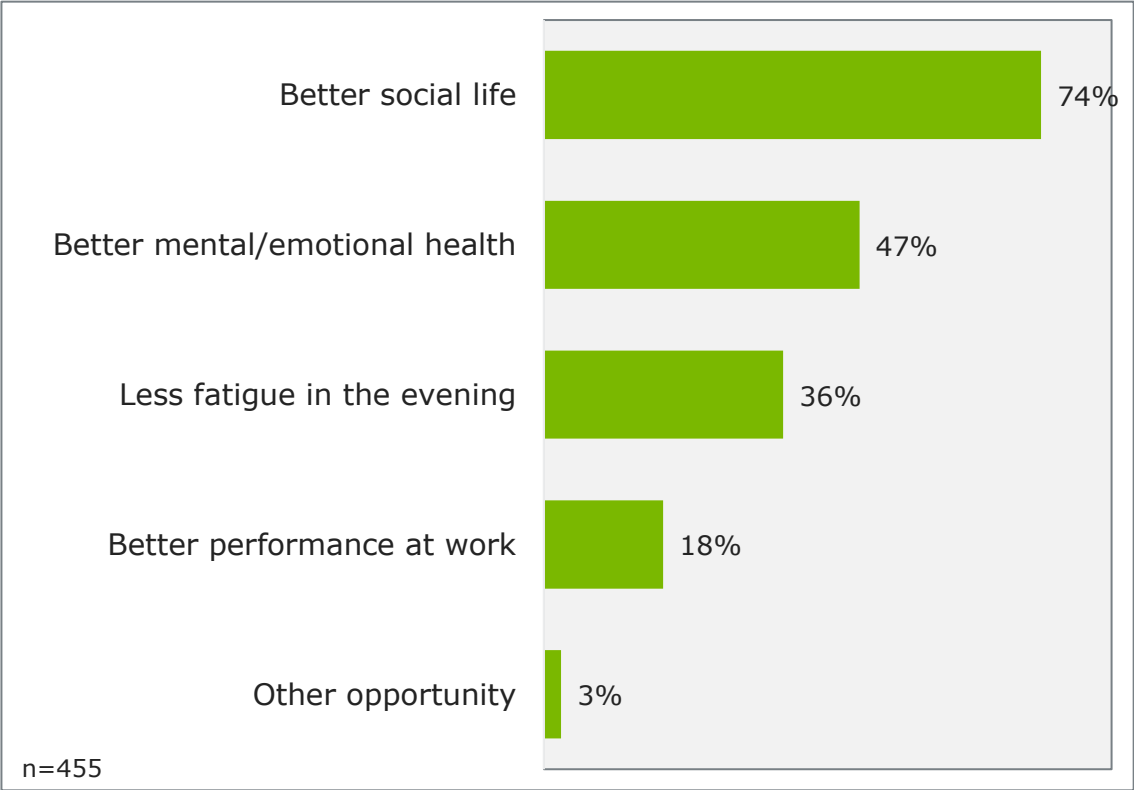


63% of all HA owners think they should have gotten their HAs sooner! The main reason is missing out on social life and mental/emotional health

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



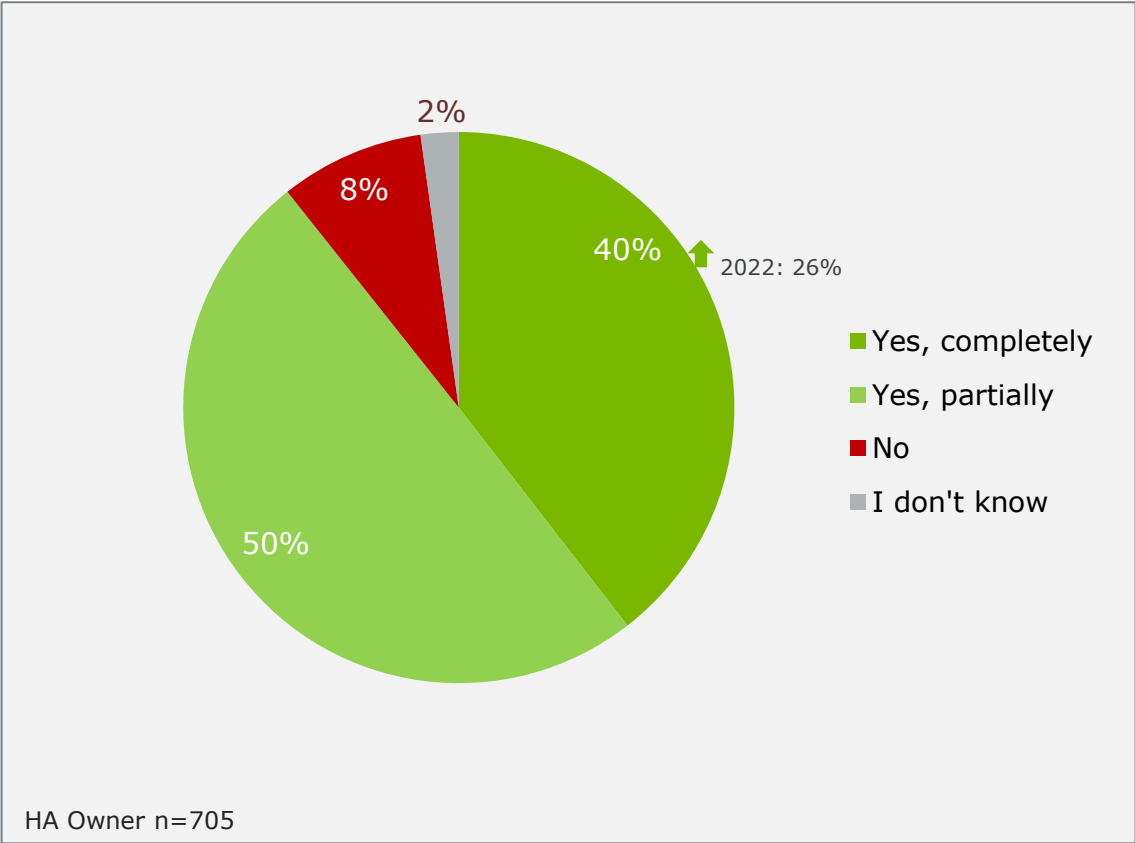
IF YES:
What are the reasons why you think you should have gotten your hearing aid(s) sooner? What are the opportunities you think you have missed because of this? Please tick all that apply.



90% claimed some 3rd party reimbursement.
49% of the hearing impaired without hearing aids think that a third party would pay for any part of hearing aids

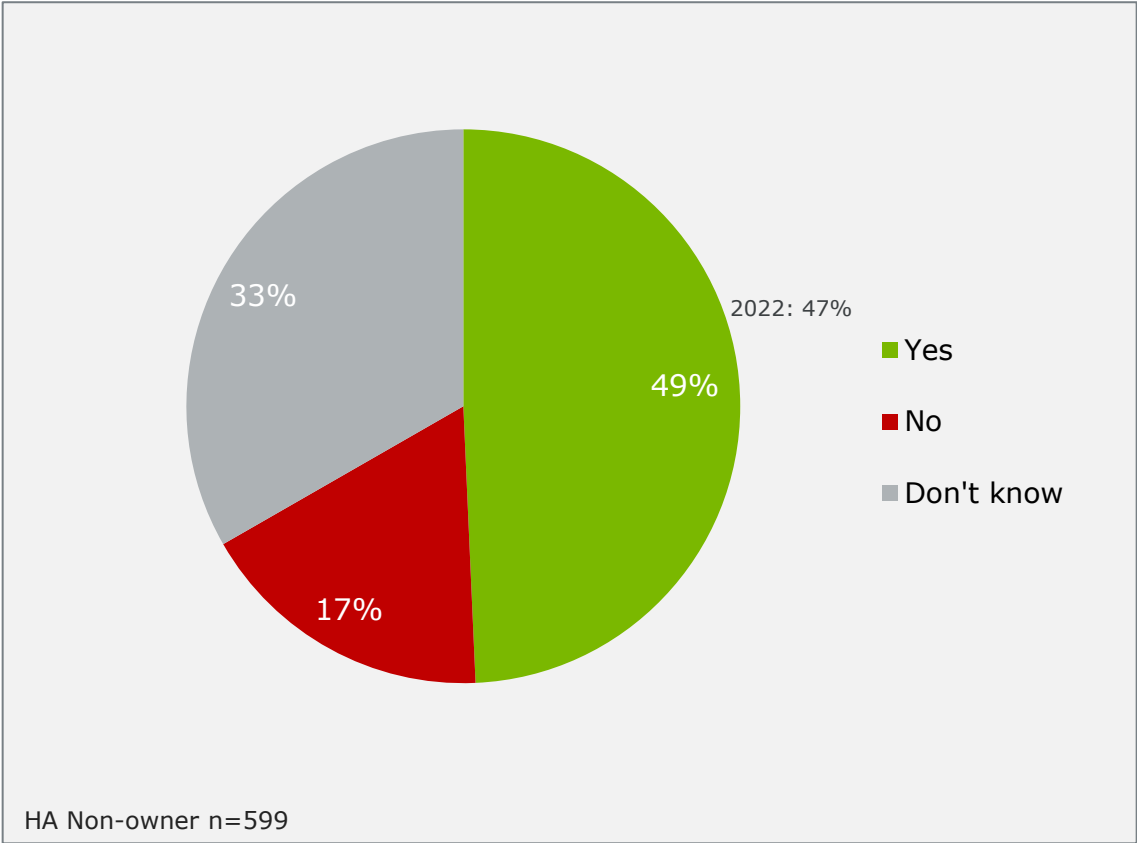
HA Owner:

Has your hearing aid been fully or partially paid for by a third party organization? (Insurance, Government)



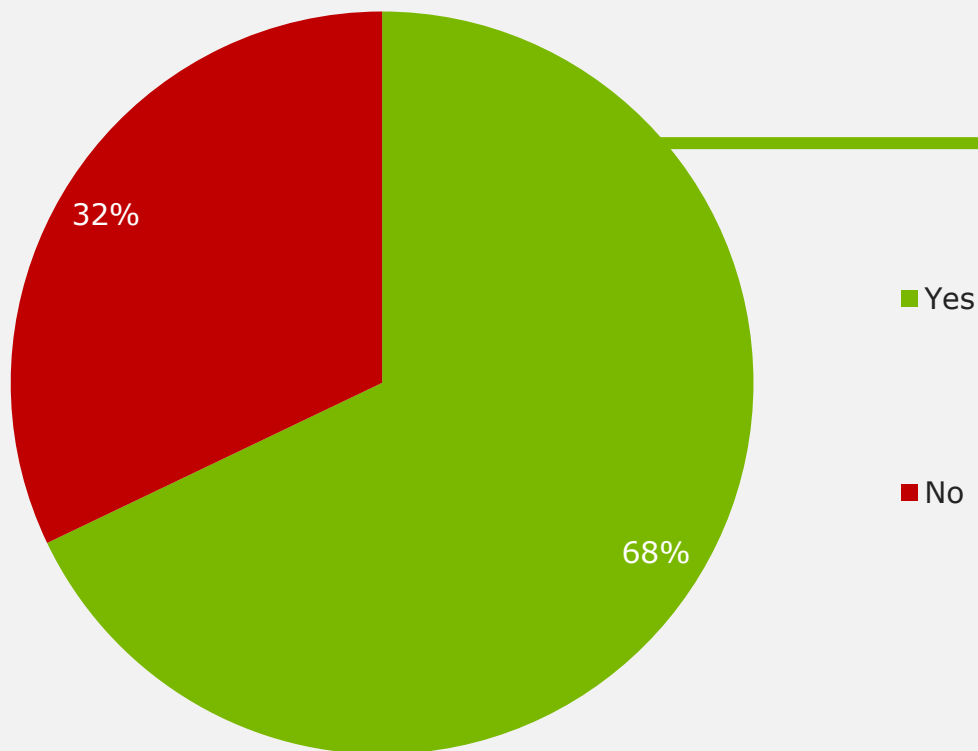
HA Non-owner:

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



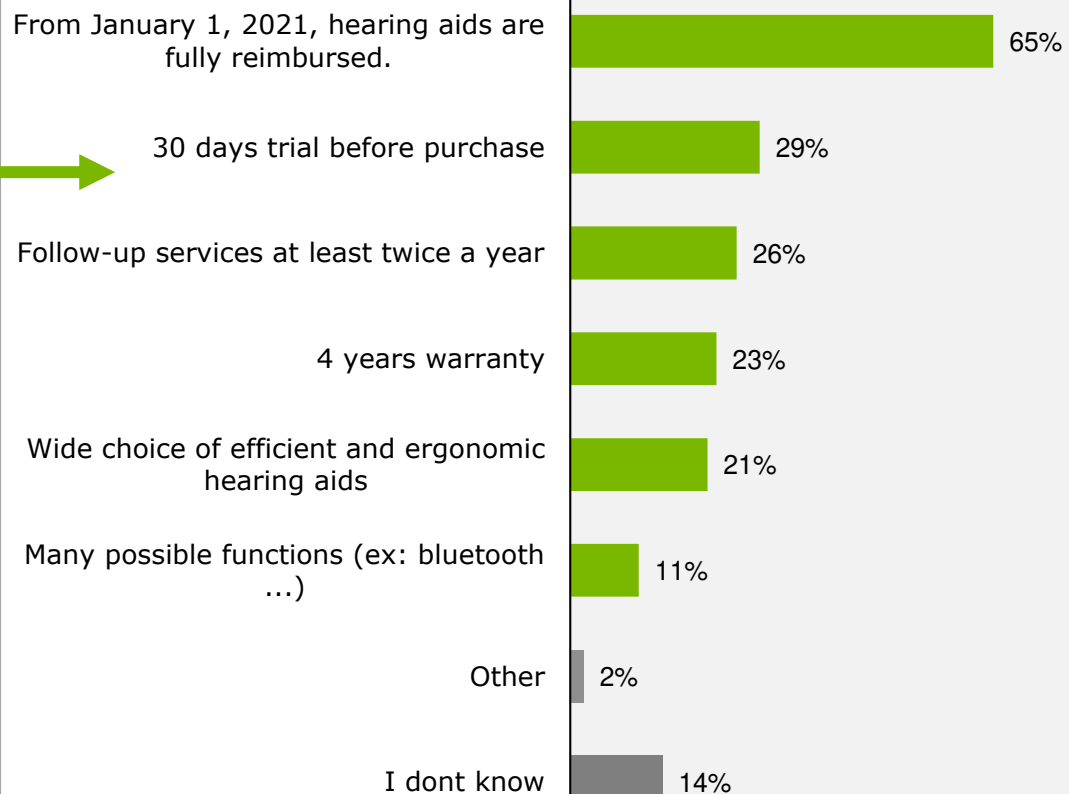
68% of the hearing impaired have heard of "100% Santé" and most of them are aware that HAs are fully reimbursed since January 2021

A reform called "100% Santé" now offers improved reimbursement for hearing aids with an out-of-pocket charge of €0. Have you ever heard of this reform?



Hearing impaired n=1'304

What do you think the 100% Santé reform consists of?
Please tick all that apply

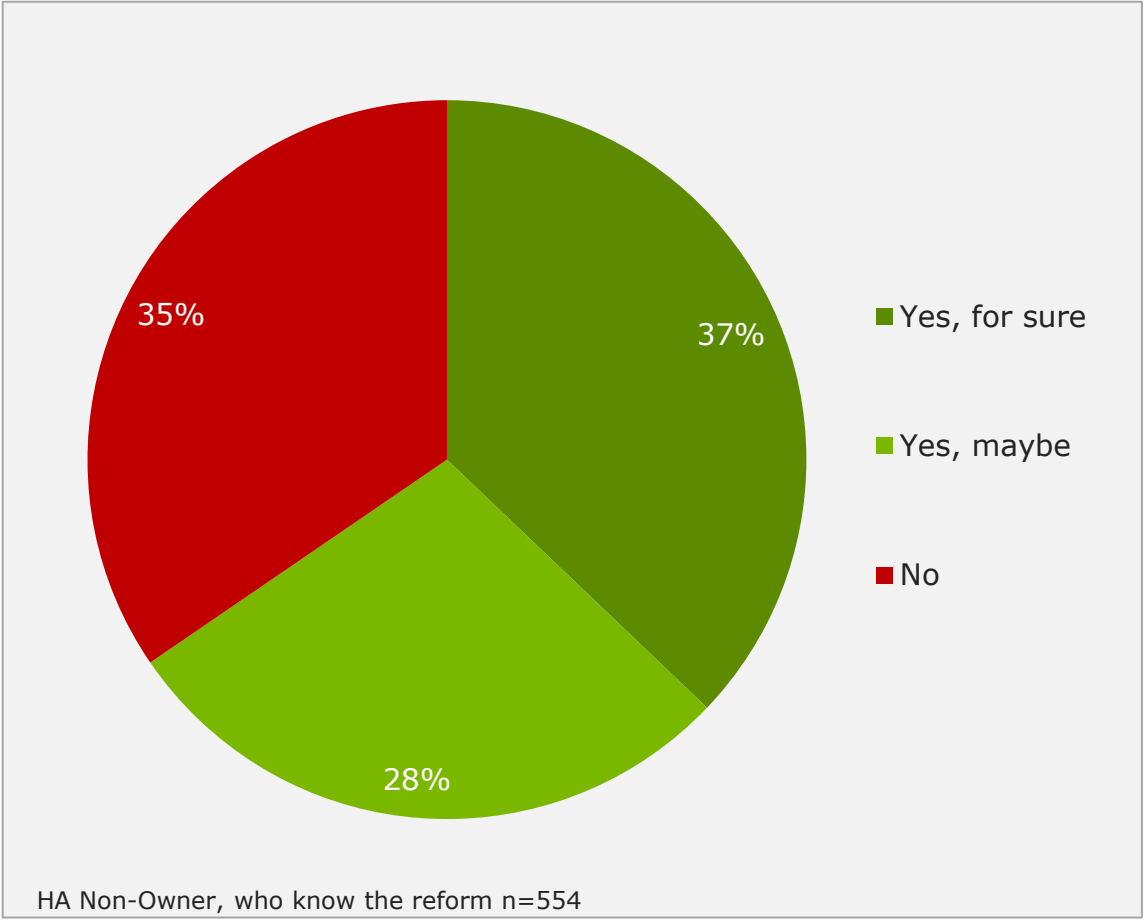
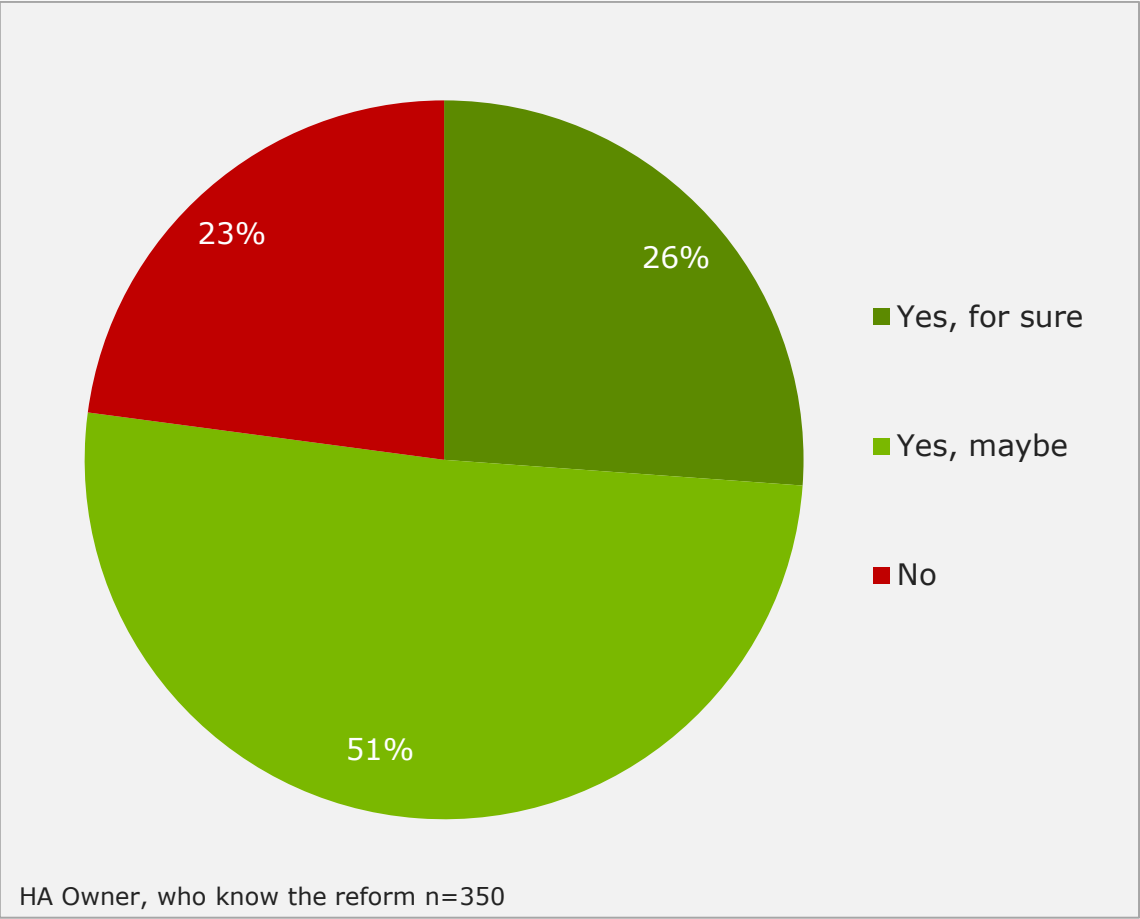


Those, who heard of the reform n=904

Awareness of the reform influences the renewal and acquisition of hearing aids

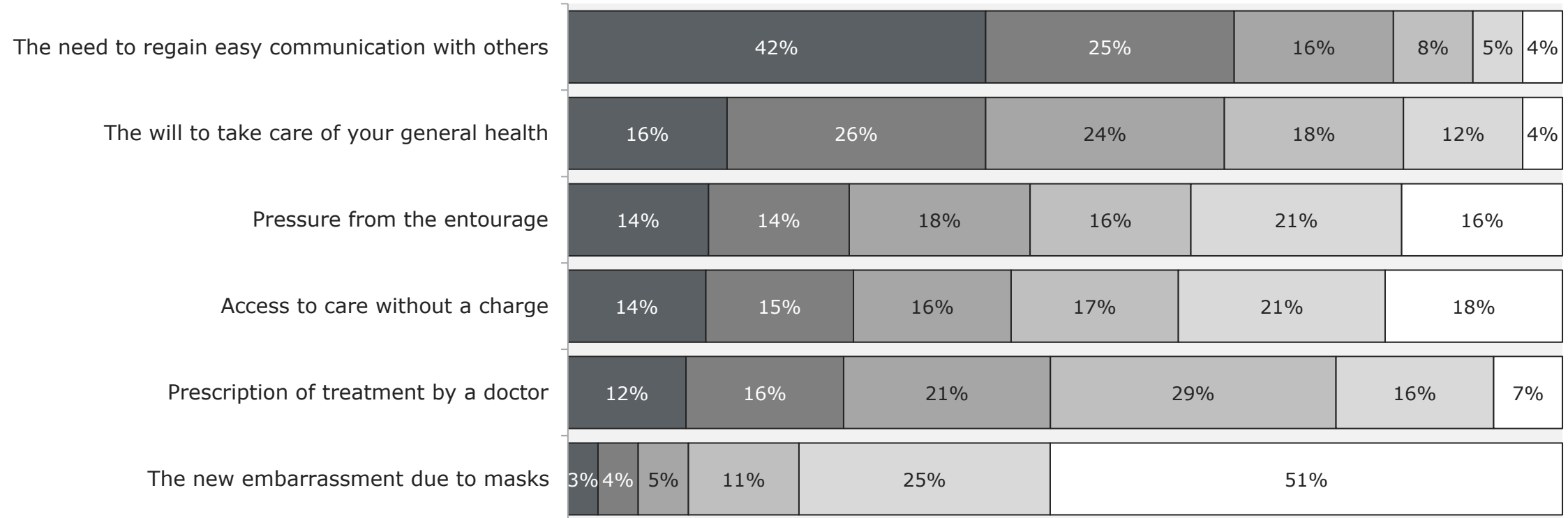
Will this reform encourage you to renew your hearing aids more quickly?

Do you plan to take advantage of "100% Santé" and get yourself hearing aids?



Better communication is by far the most important reason to wear hearing aids, followed by taking care of general health

What is now, in order of importance, the reason for your decision to wear hearing aids?
(RANKING: RANK 1 = most important, RANK 6 = least important)



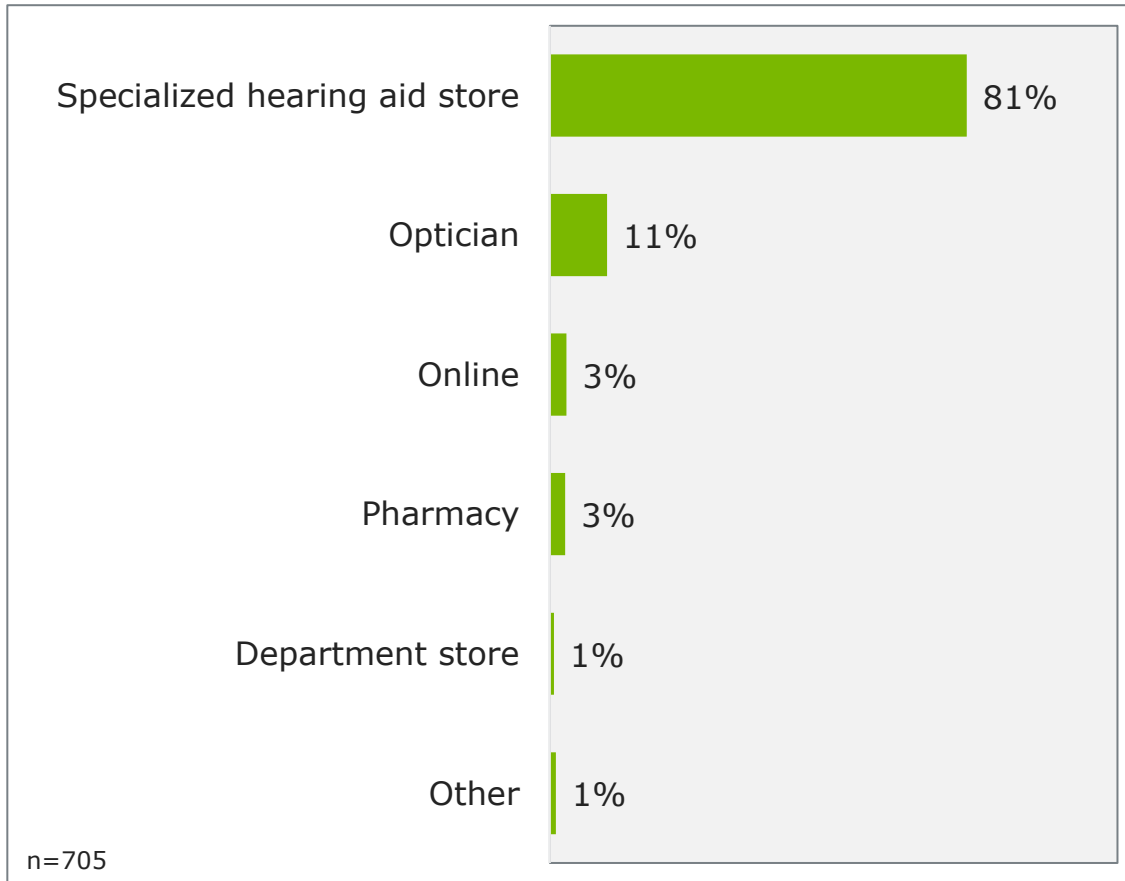
HA-owner, n=705

■ RANK 1 ■ RANK 2 ■ RANK 3 ■ RANK 4 ■ RANK 5 ■ RANK 6

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

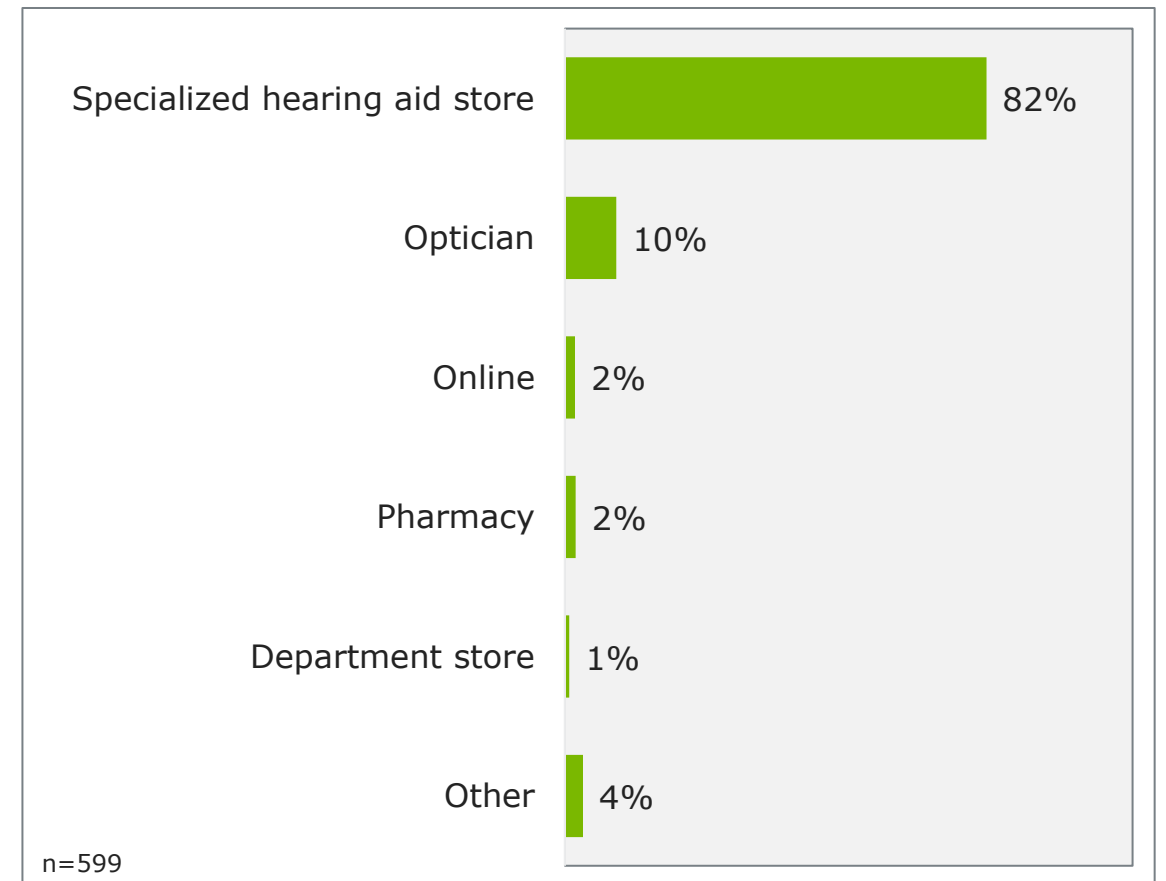
HA Owner:

Where was your most current hearing aid obtained?



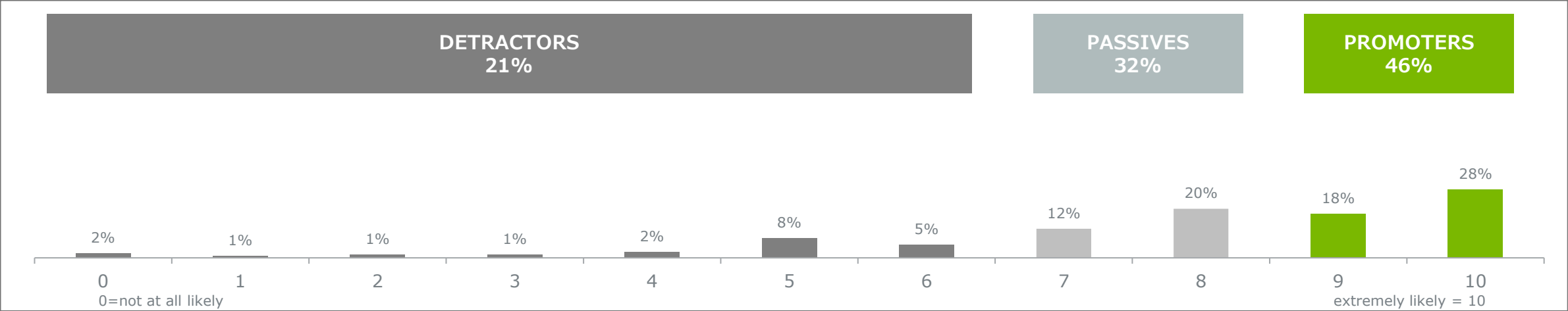
HA Non-owner:

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



Recommendation intention of the place where the hearing aid(s) have been obtained: Positive NPS score of 25

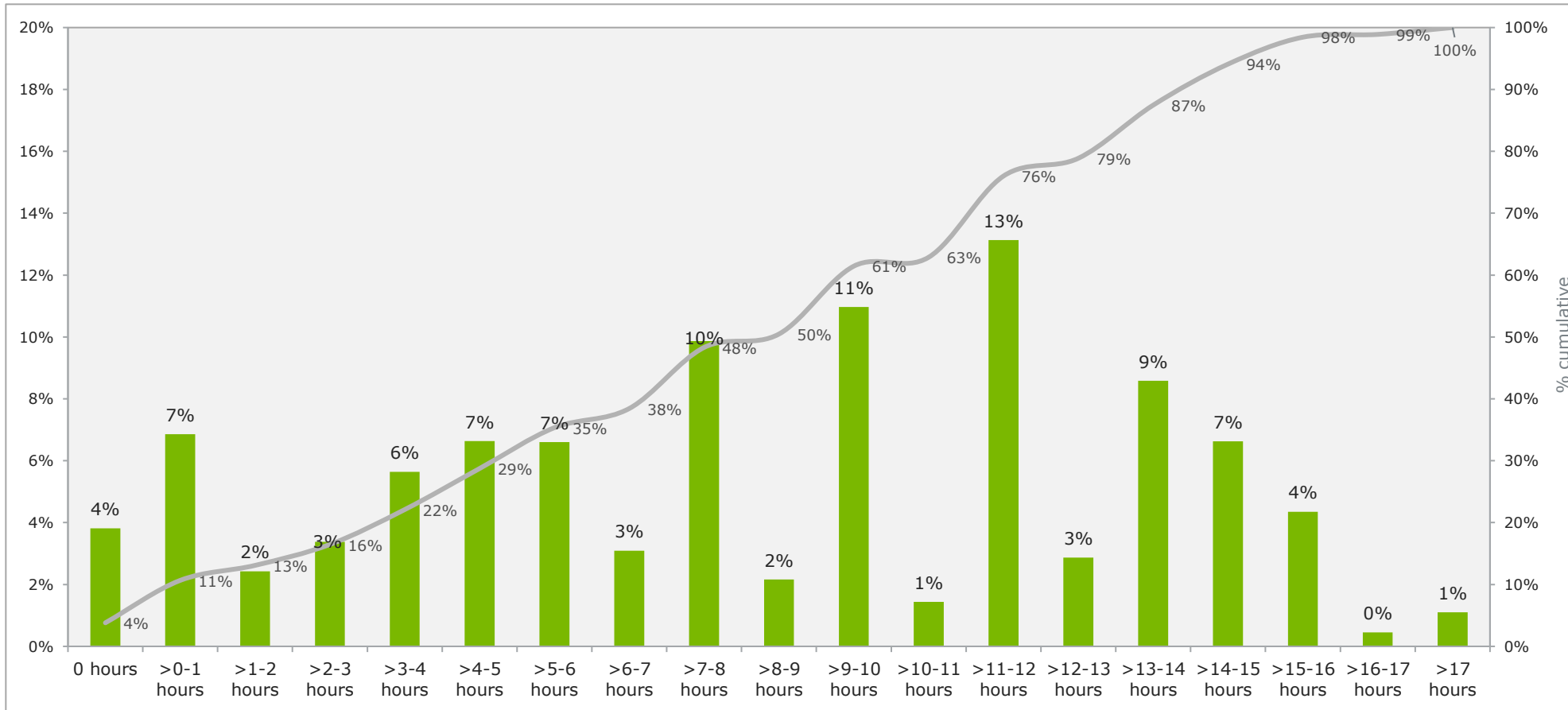
Considering your complete experience, how likely would you be to recommend the place where you obtained your hearing aids to a friend or colleague?



NPS = PROMOTERS – DETRACTORS = 25 (2022: 10) (exact figure rounded)

On average, HAs are worn 8.8 hours a day

How many hours a day are HA worn?



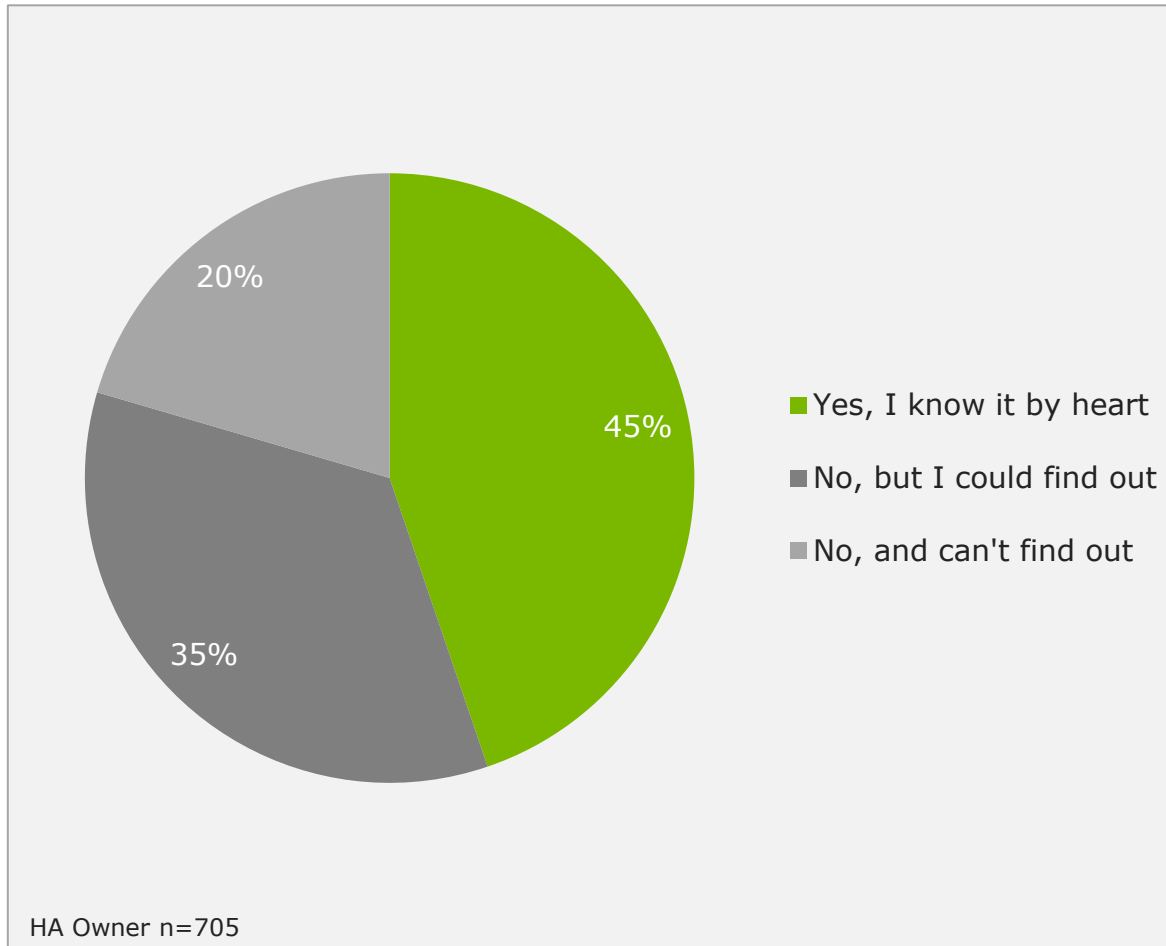
HA worn:
2025 Mean: 8.8 hours/day
2022 Mean: 8.4 hours/day

In the drawer (0 hours):
2025: 4%
2022: 5%

HA Owner n=705

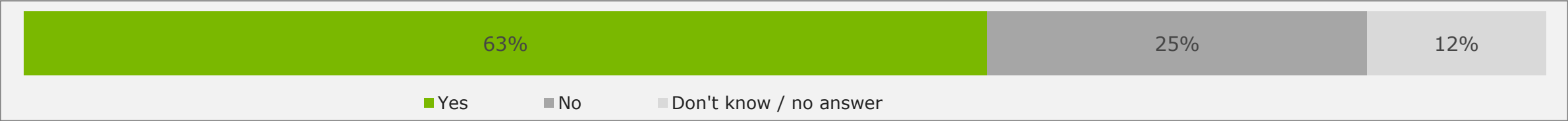
45% of today's hearing aid owners are aware of their hearing aid brand – trend increasing

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



42% of the HA owners use a hearing aid app (trend increasing) (2022: 35%), and 80% are satisfied with it

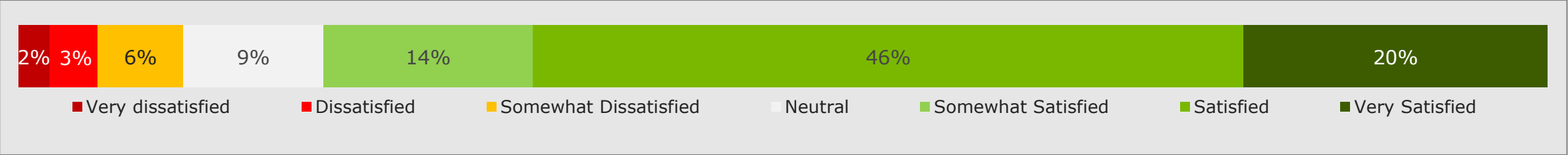
Have you been informed by your hearing care professional about hearing aid apps?
(HA Owner n=705)



Do you personally use apps for your hearing aids?
(HA Owner n=705)

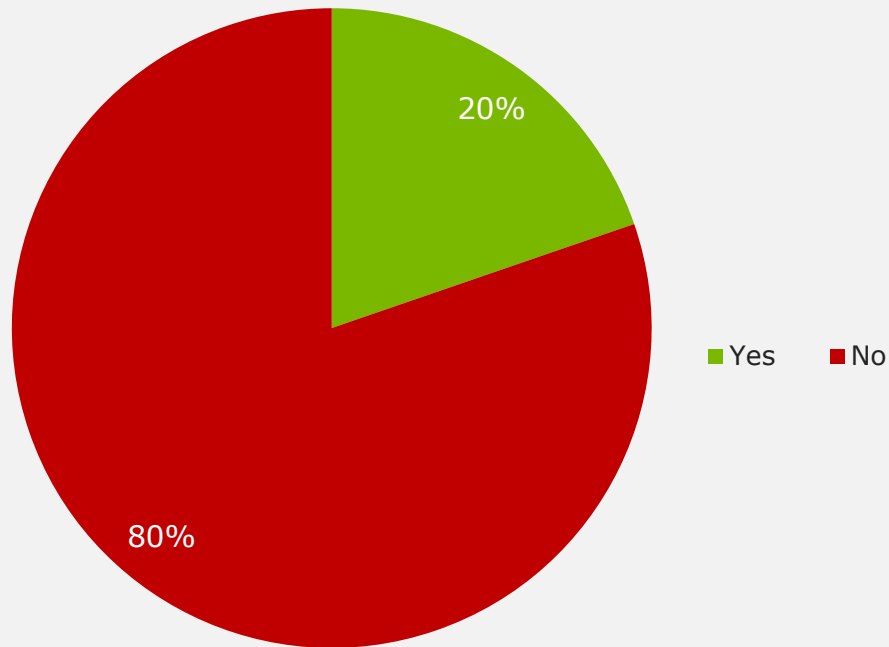


IF APPS USED (n=296):
Overall, how satisfied with the performance of your apps?



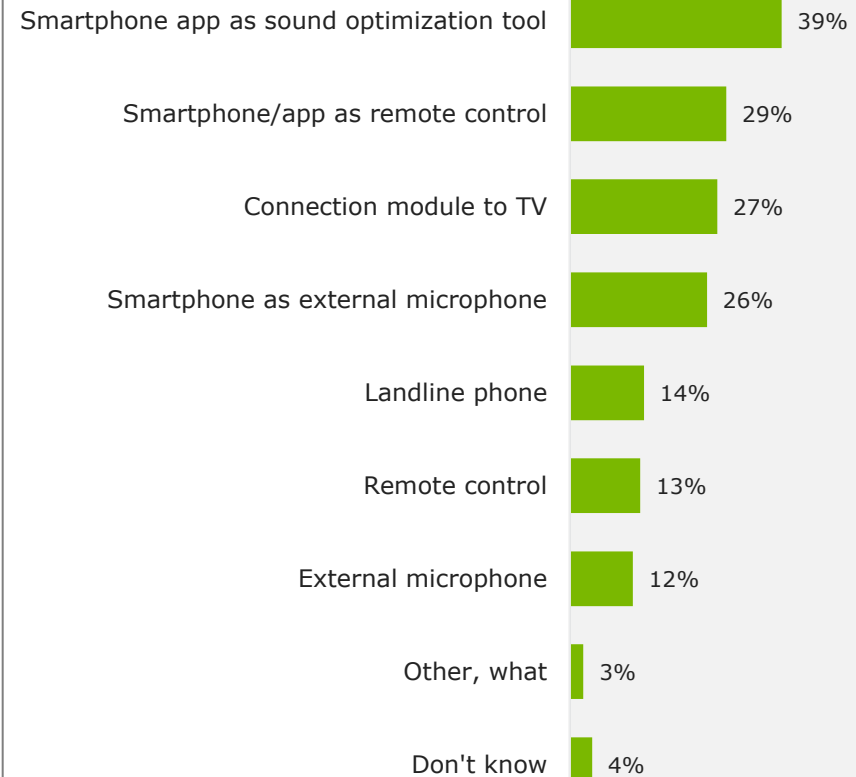
20% of the hearing aid owners use some kind of accessory for better speech understanding

Do you use accessories for your hearing aids for better speech understanding?



HA Owner n=705

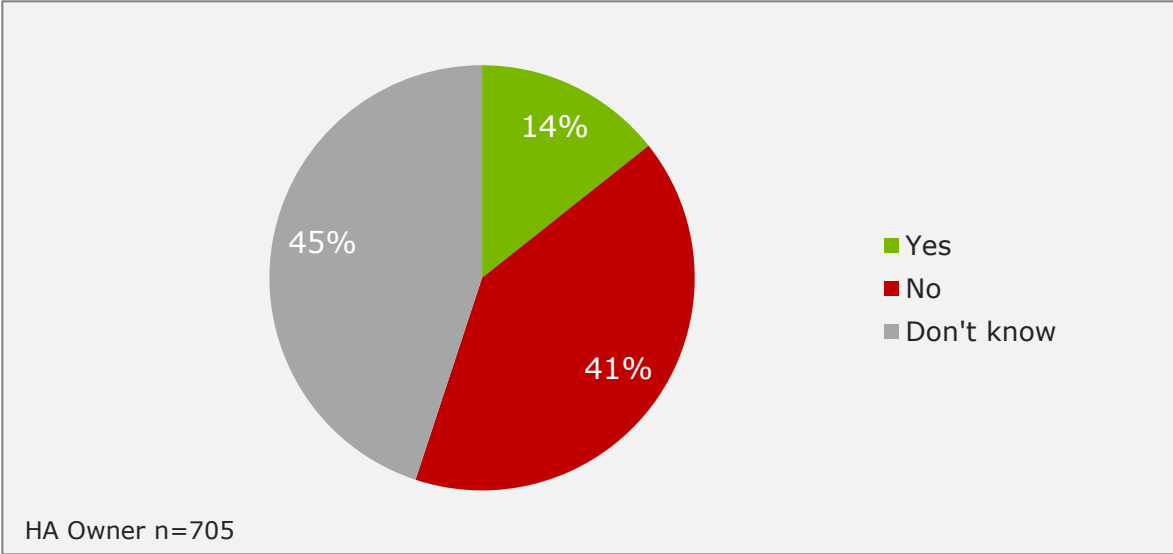
What accessories for for better speech understanding do you use with your hearing aids?



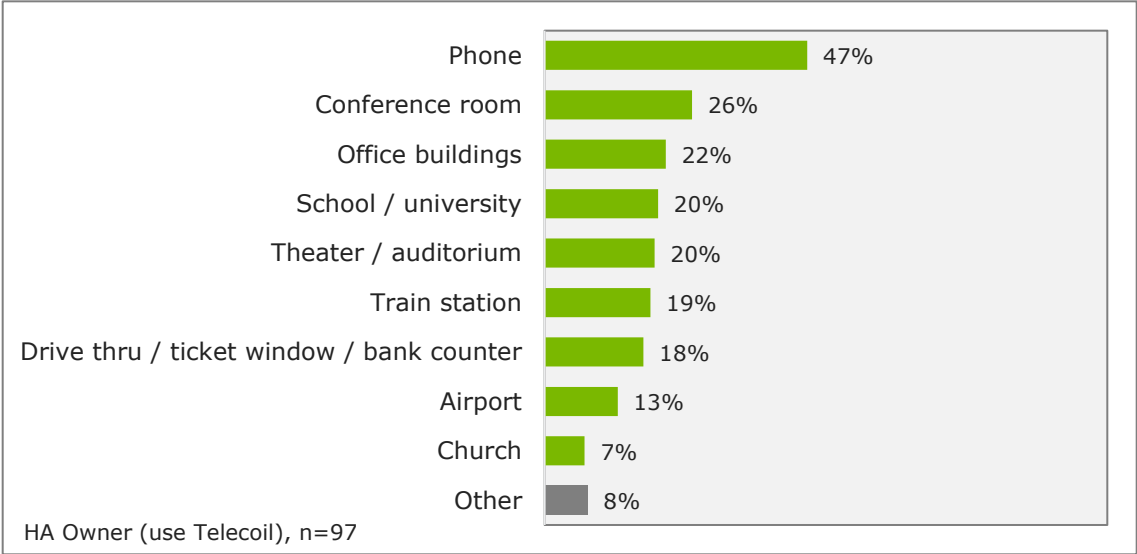
HA Owners with accessoires n=128

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

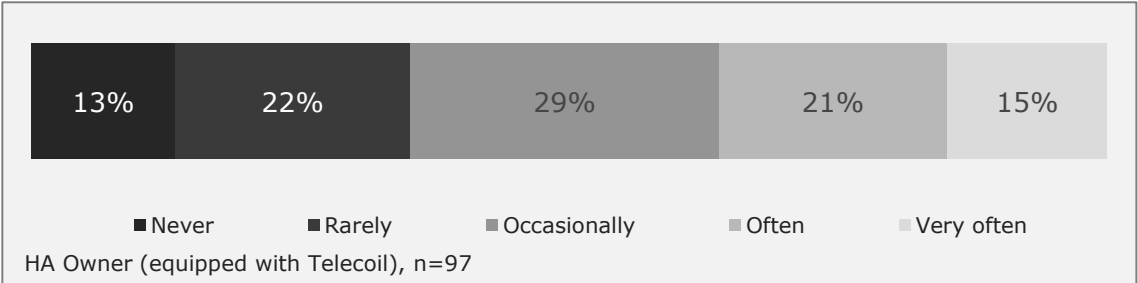
Are your hearing aids equipped with Telecoil?



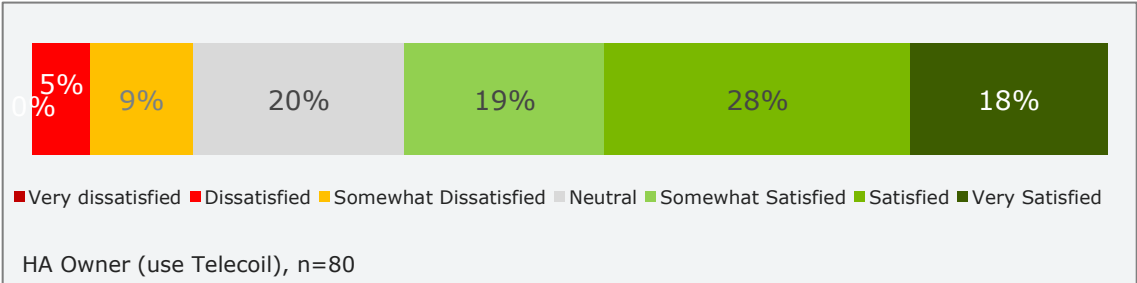
Where do you use your telecoil to improve your hearing?



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

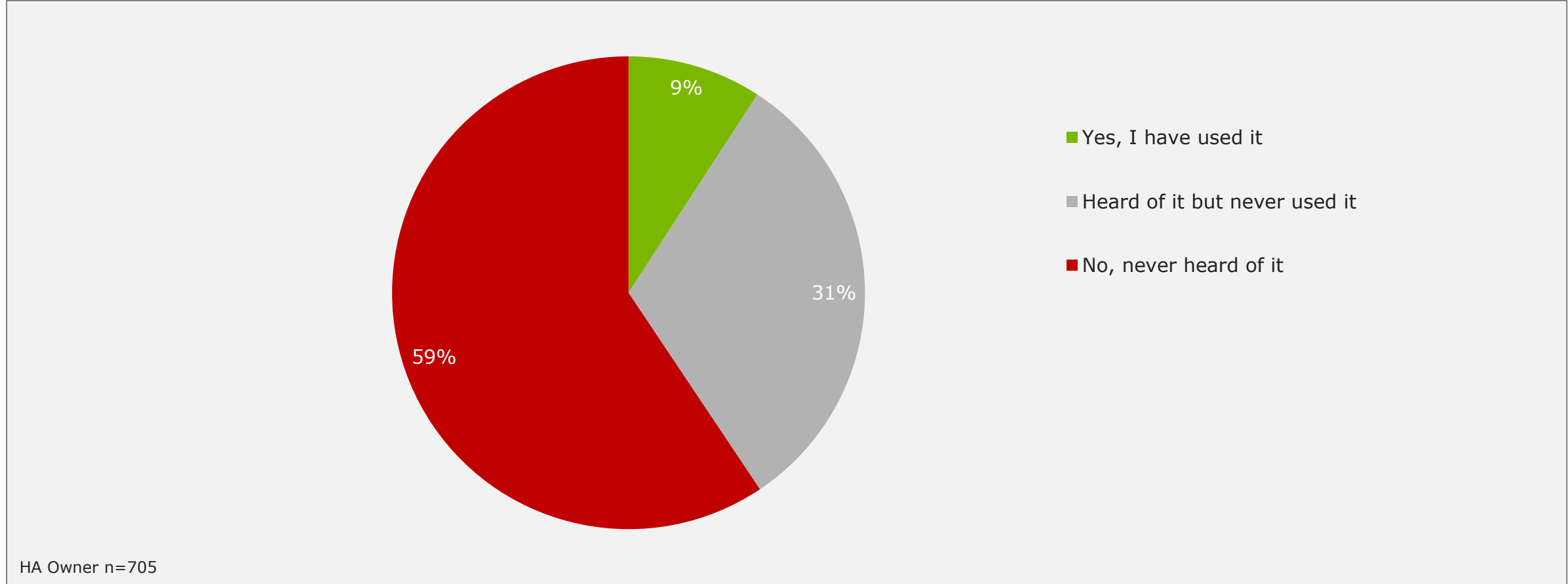


How satisfied are you with the telecoil option?



9% of the HA owners have already used remote fitting, 31% have at least heard of it, and 59% have never heard of it

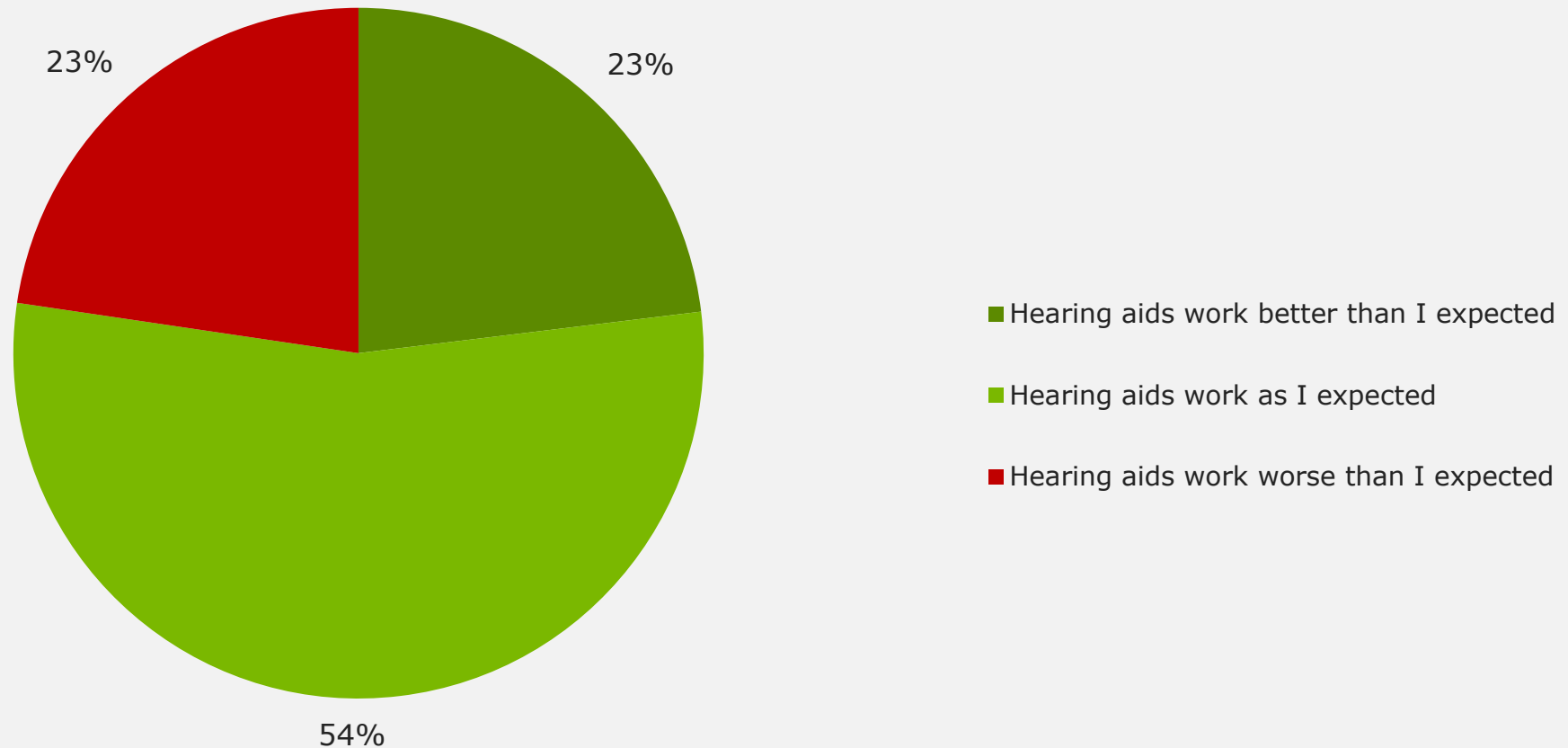
Have you ever heard of Remote fitting for your hearing aids?
 (Remote fitting: enables your hearing care professional to fit and fine-tune hearing aids from a distance (in real-time via video chat via an app), so that you don't need to leave your house to get your hearing aids adjusted)



Satisfaction with hearing aids and drivers

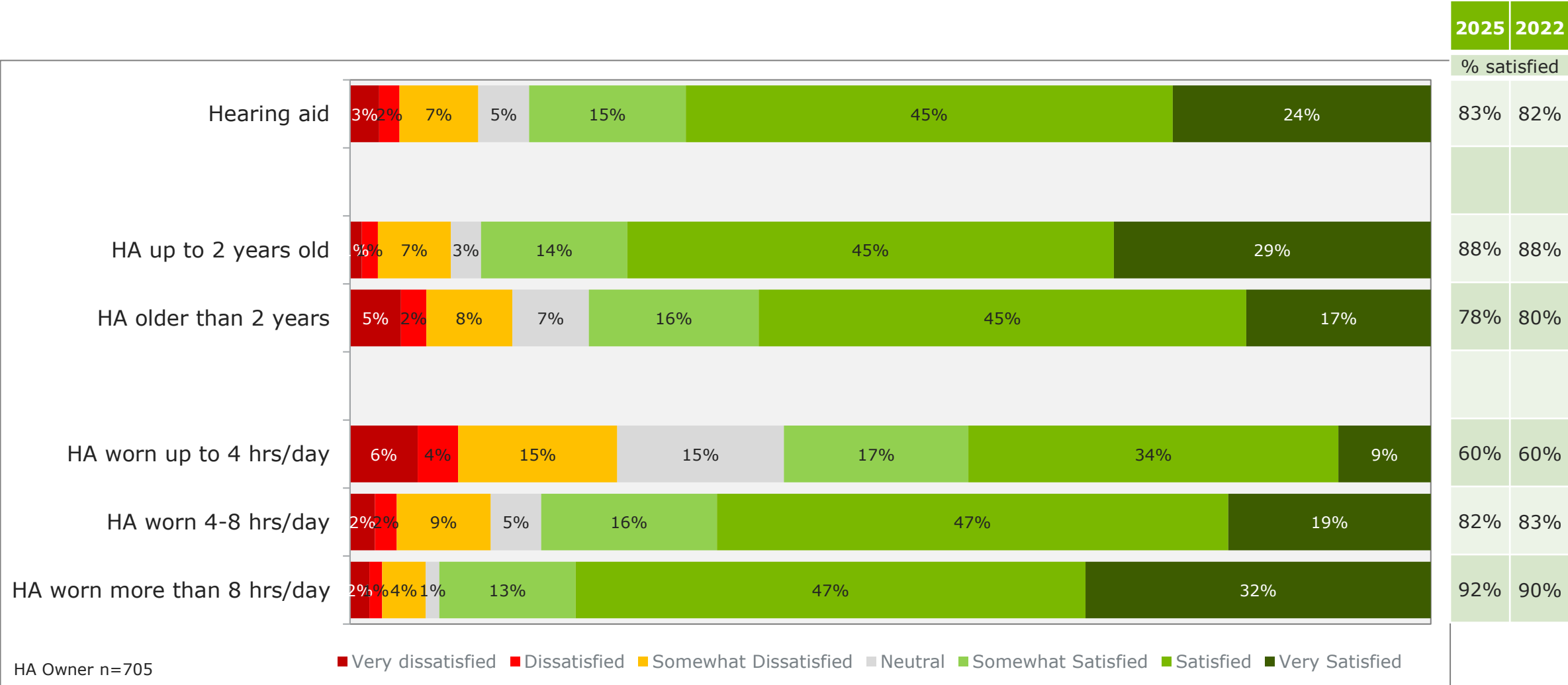
77% of hearing aid owners say their hearing aid works better than or as expected

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

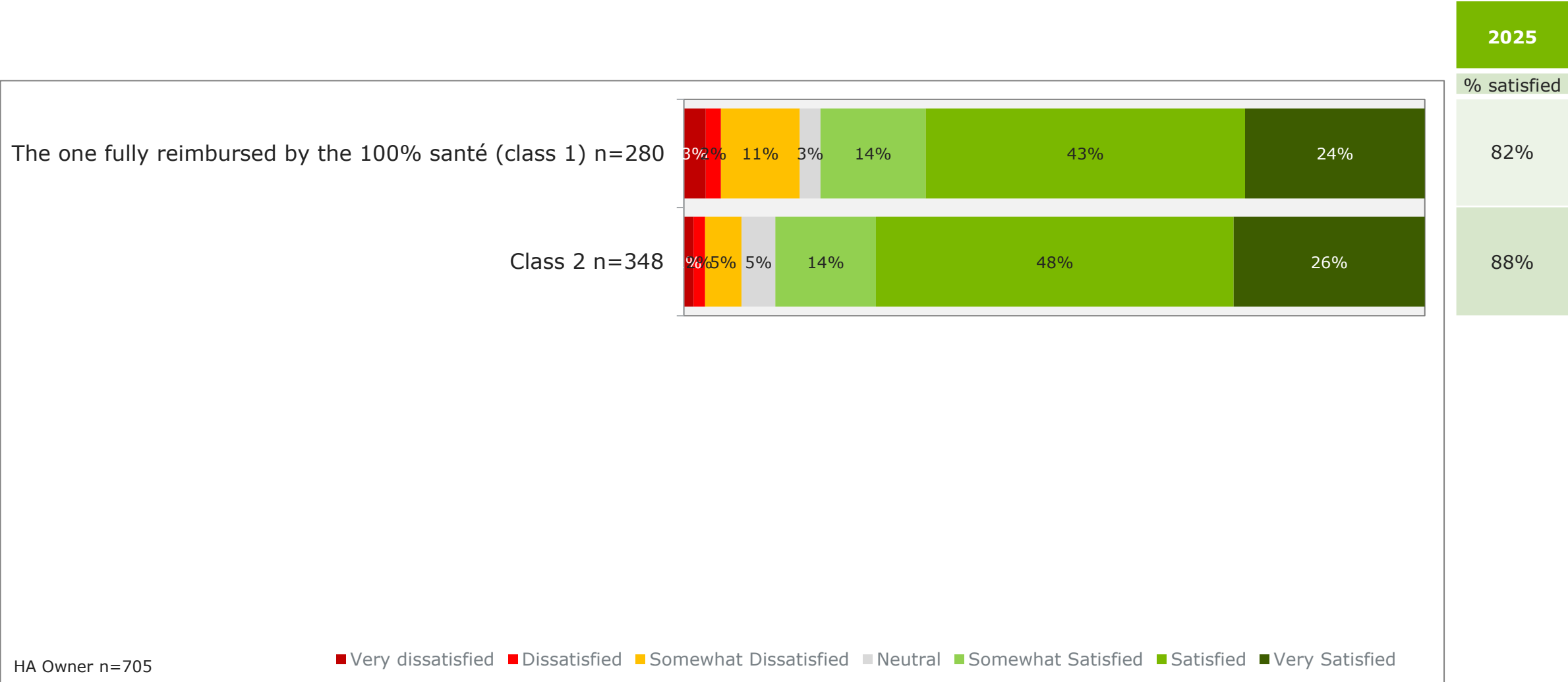


HA Owner n=705

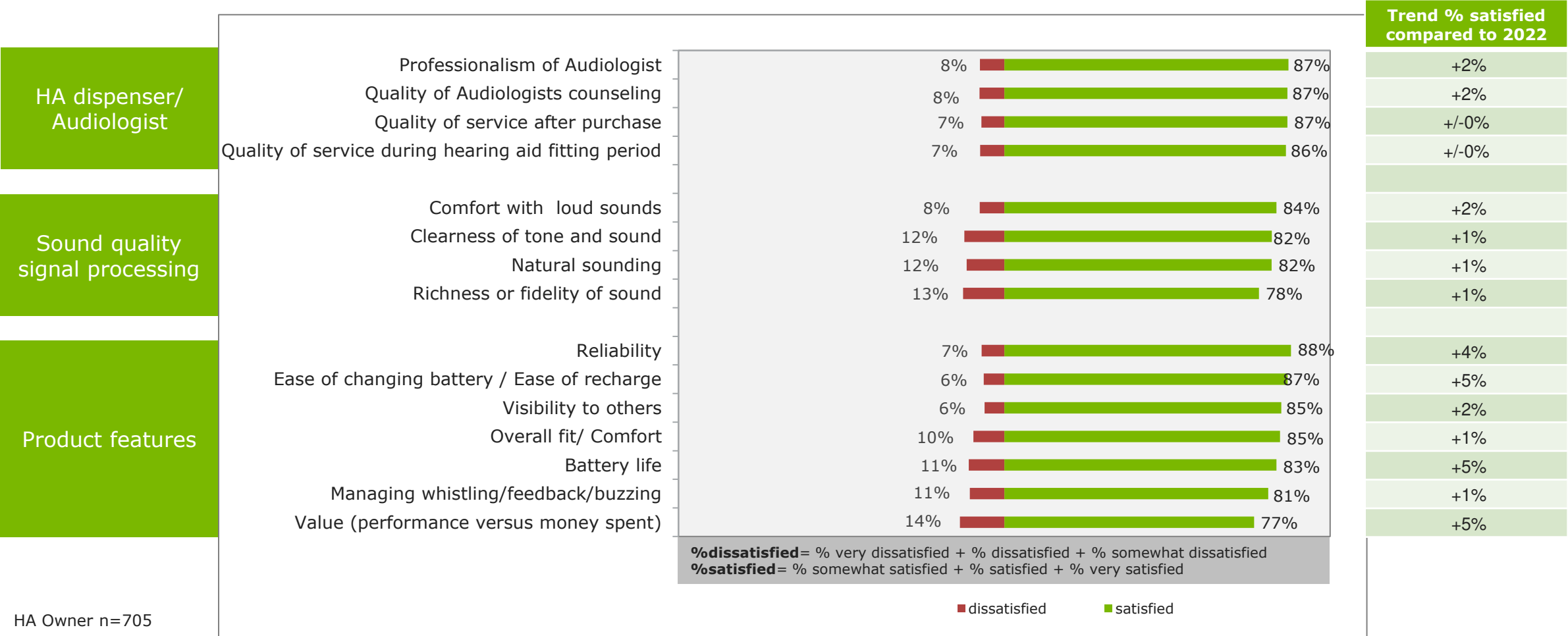
Overall satisfaction with HA: 83% of hearing aid owners are satisfied with their hearing aid(s)



Overall satisfaction with HA

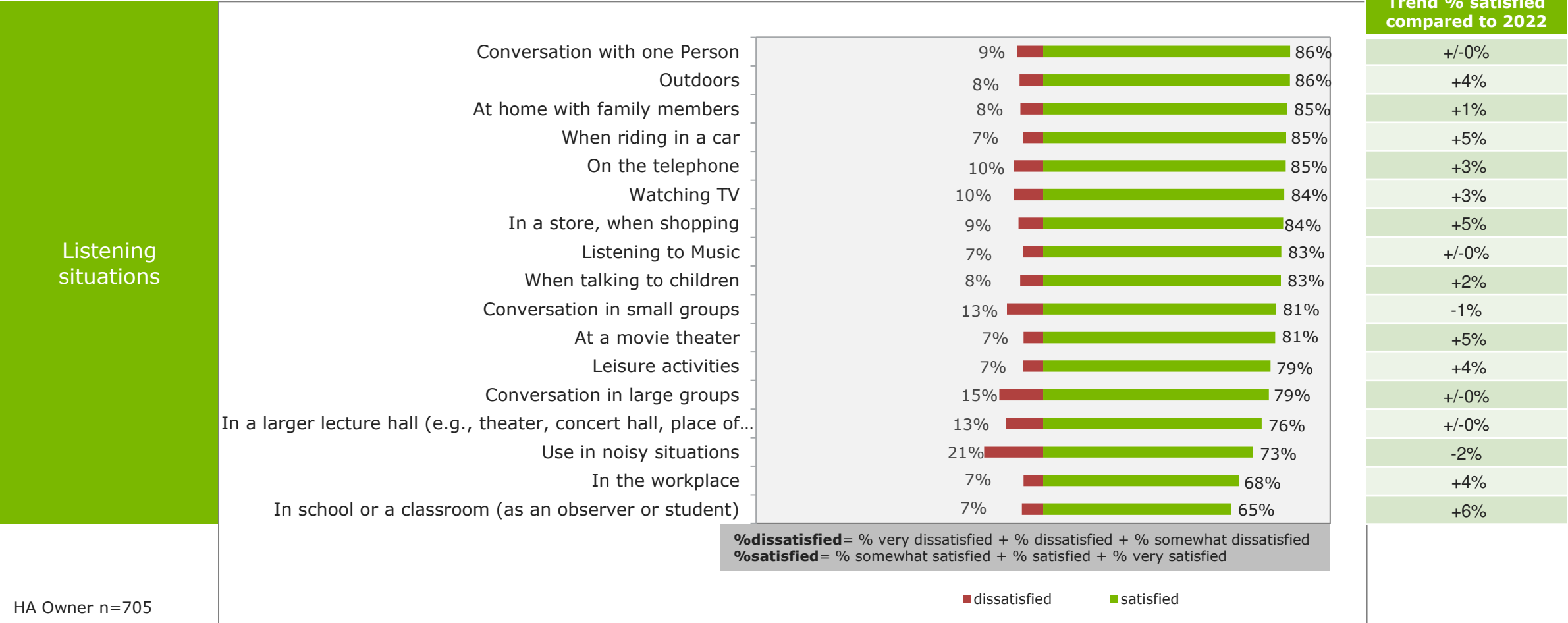


Satisfaction with current hearing aids



HA Owner n=705

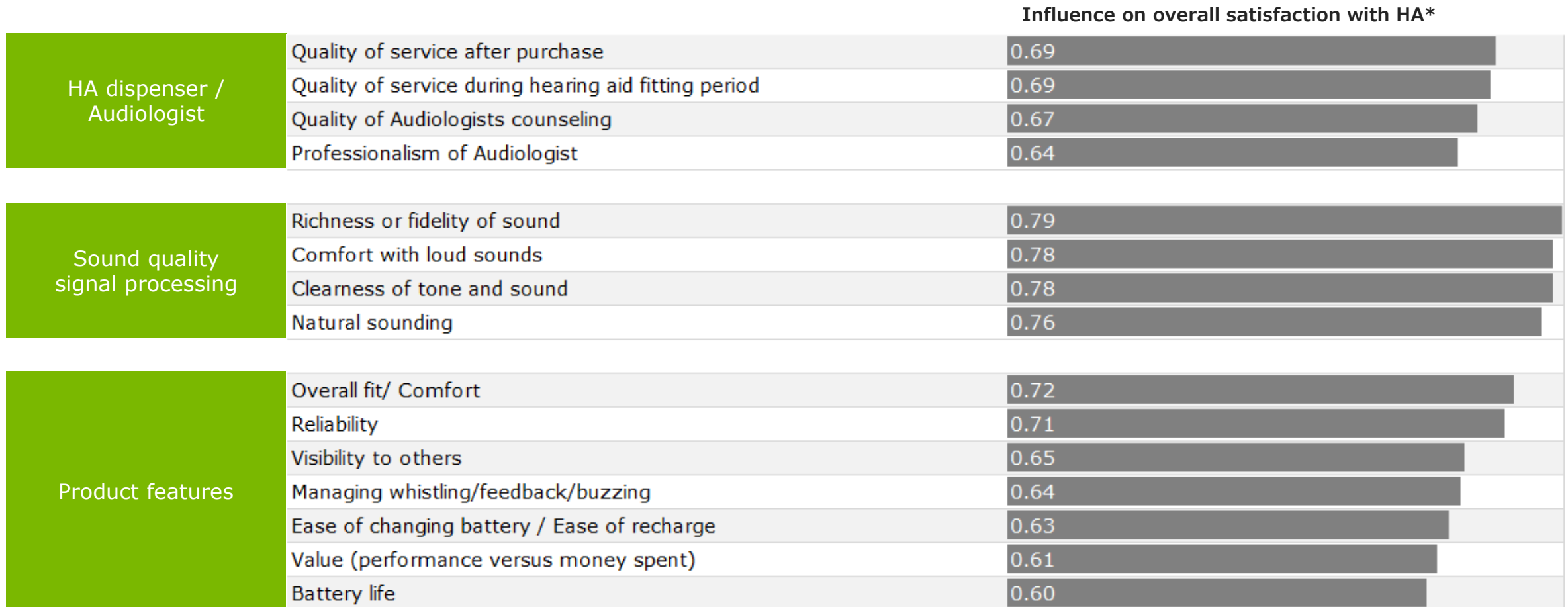
Satisfaction with current hearing aids



HA Owner n=705



The factors that most influence satisfaction with current hearing aids are related to sound quality

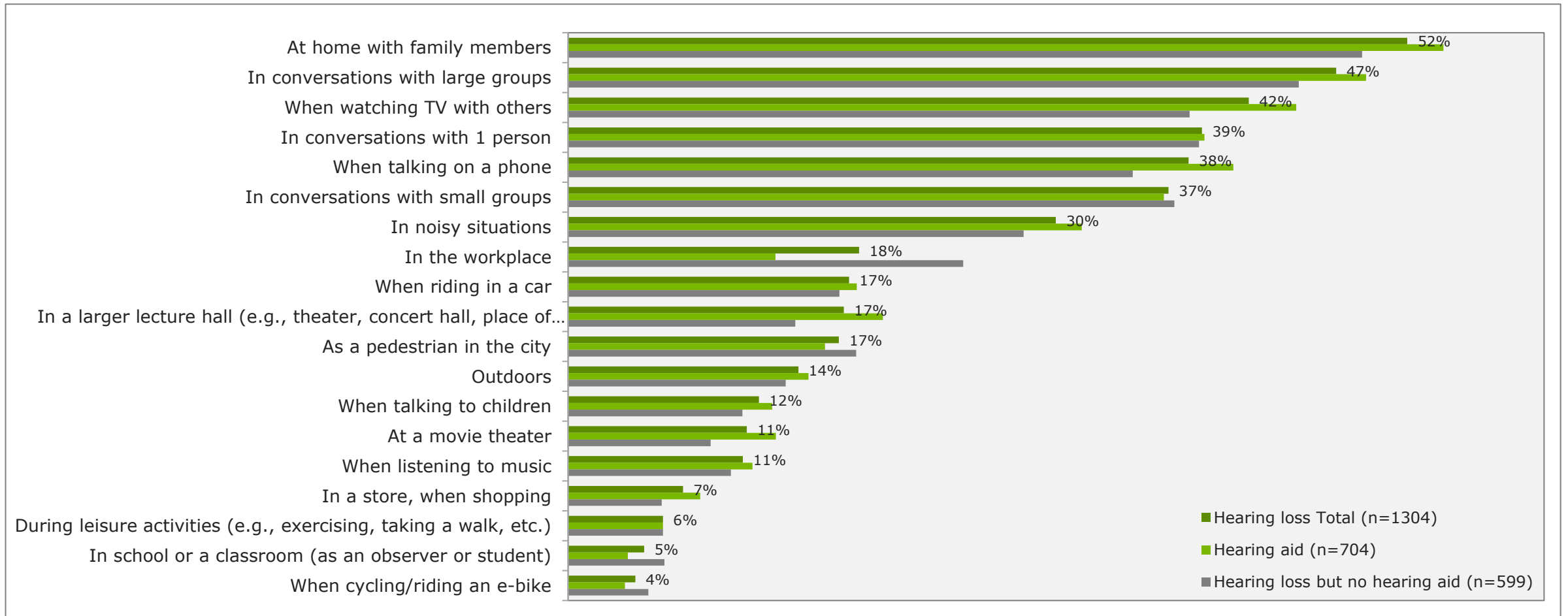


HA Owner n=705

*The Influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction, 1 means a maximal relationship.

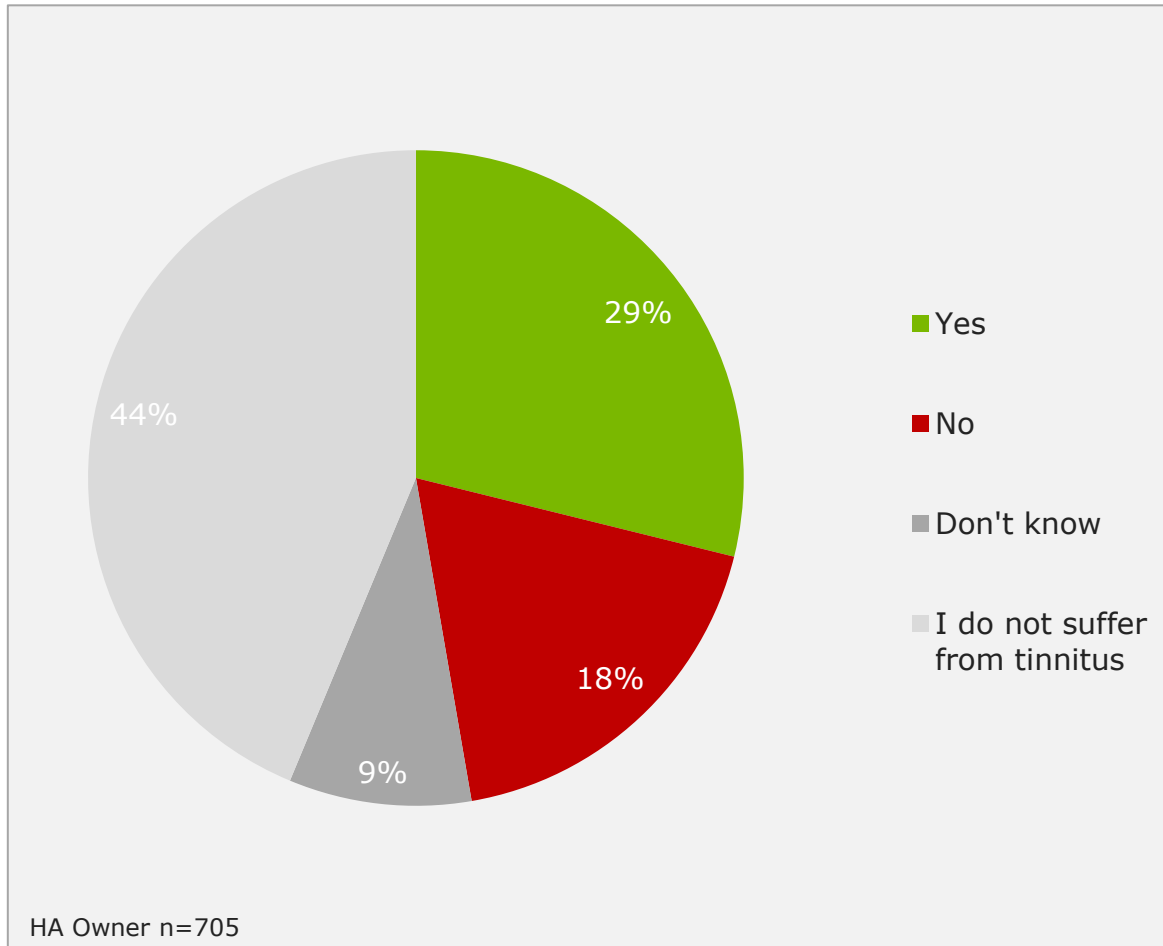
The most important listening situations are talking at home with family members, conversations in large groups and watching TV

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



The majority of hearing aid users with tinnitus agree that hearing aids reduce the discomfort of tinnitus

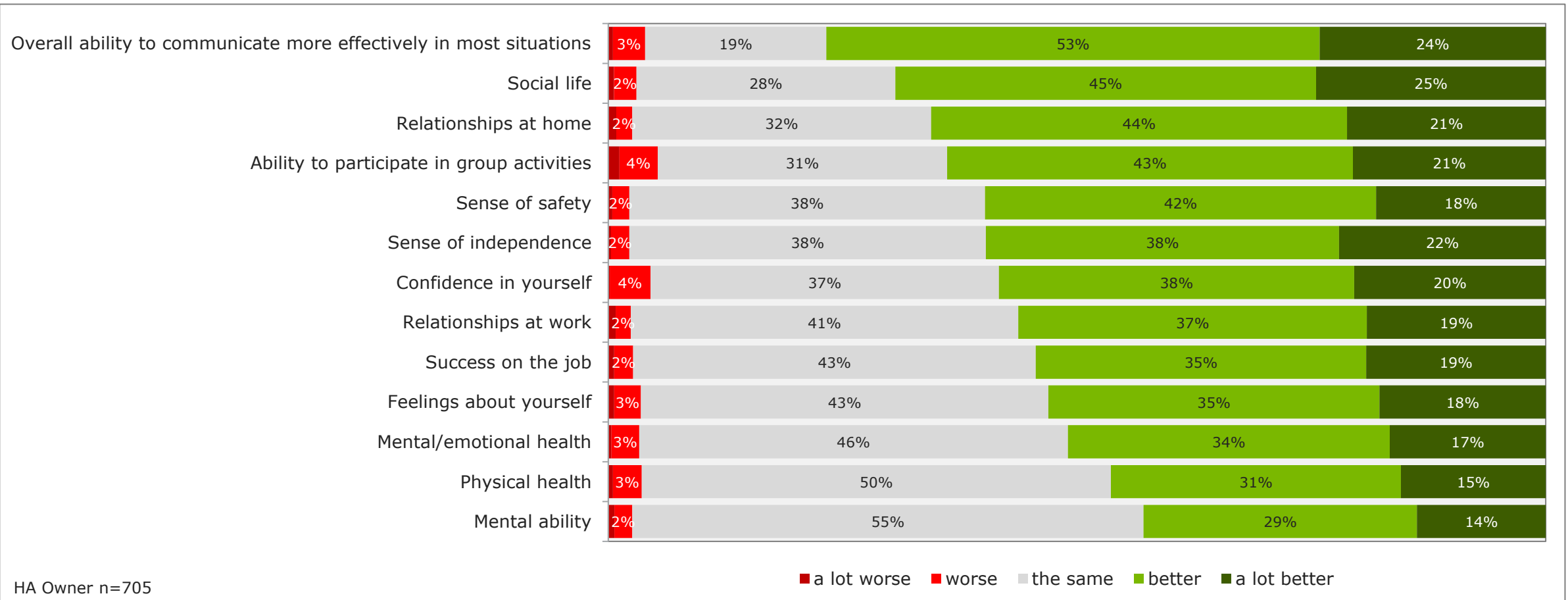
If you suffer from tinnitus, do hearing aids reduce the discomfort caused by tinnitus?



Positive impact of hearing aids, quality of life

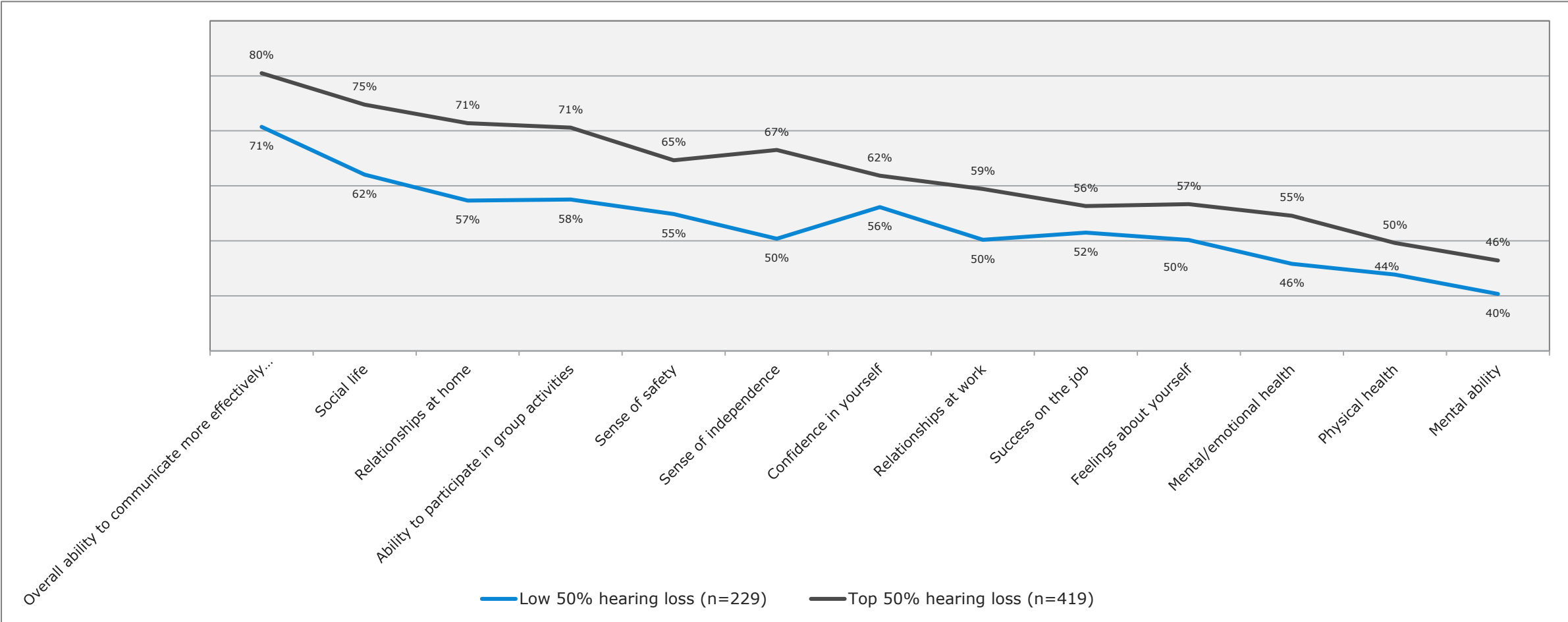
Hearing aids have a positive impact on communication ability, social participation, relationships at home, and many other aspects of life

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



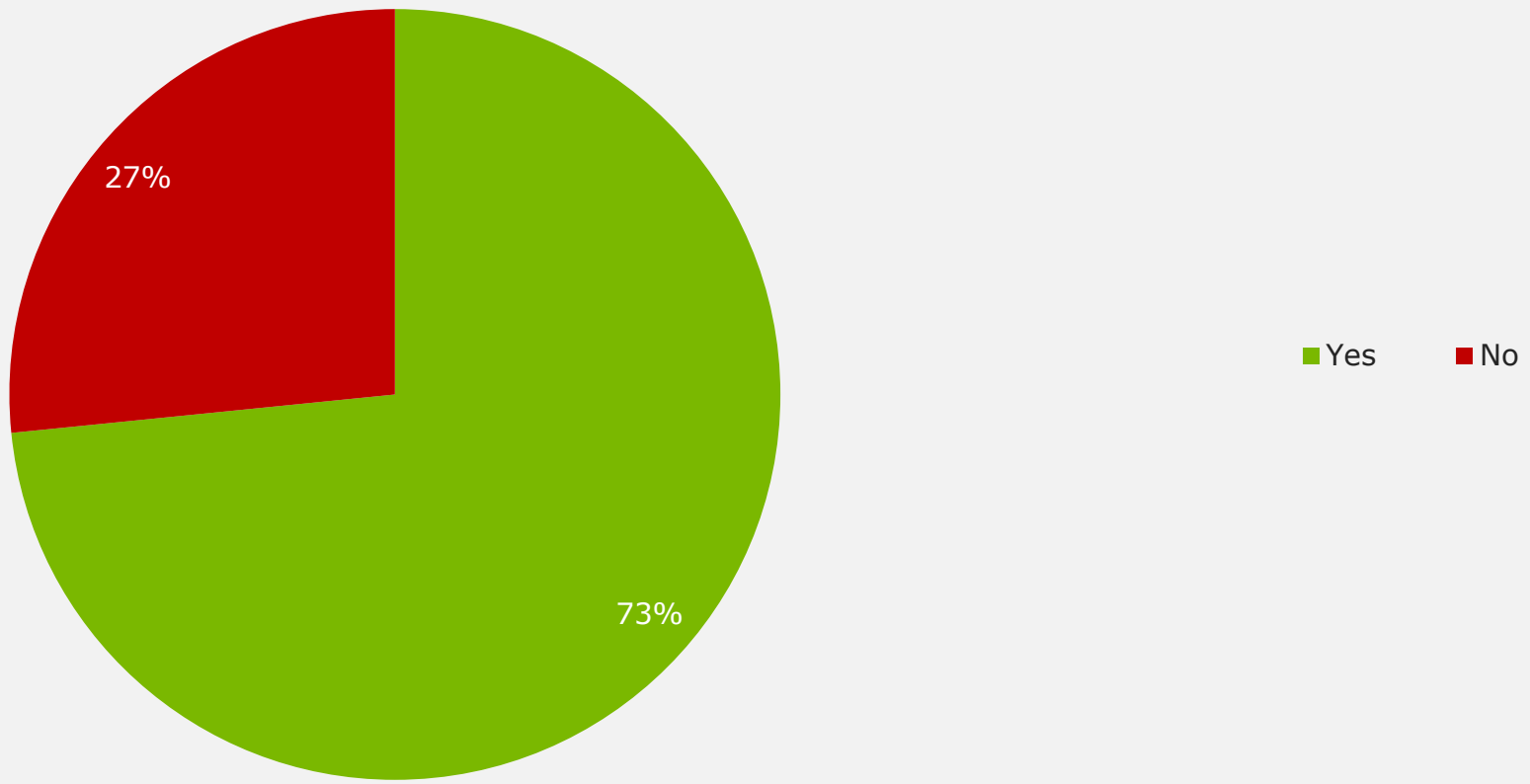
Patients with a Top 50% hearing loss perceive the impact of hearing aids more positively in all aspects

% of HA Owners feeling better/a lot better



73% 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?

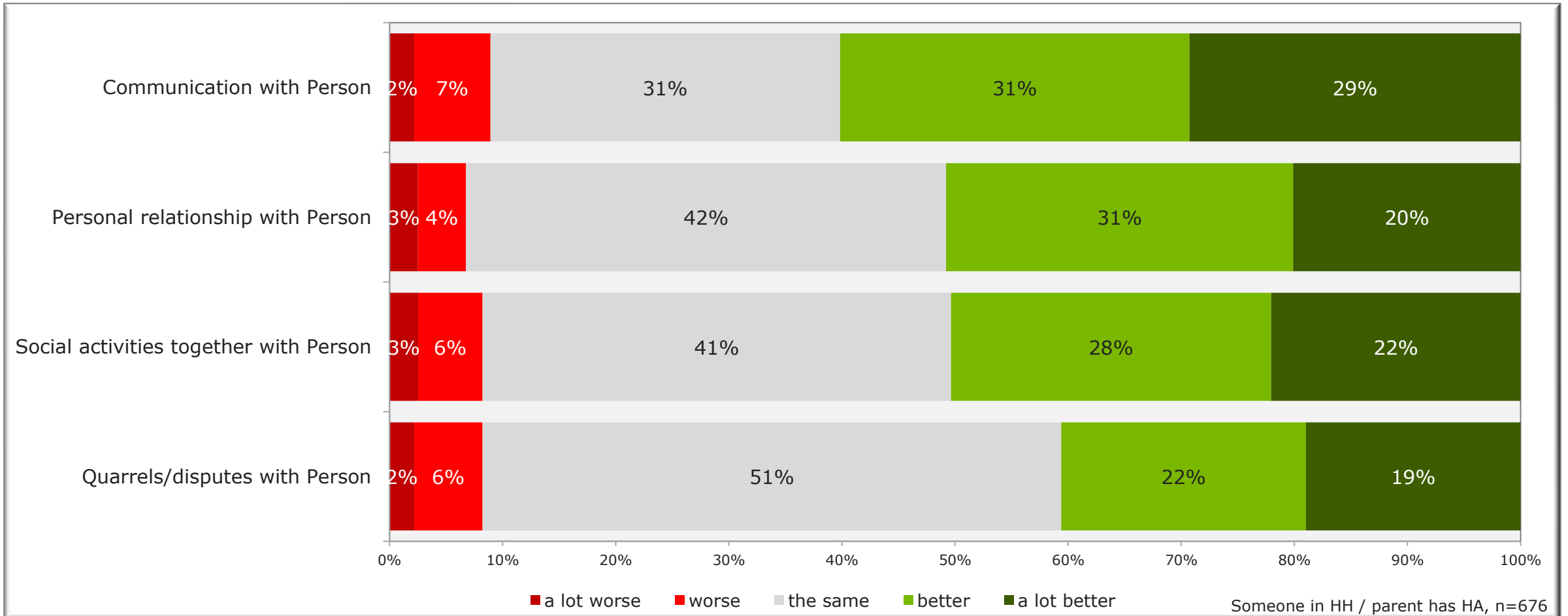


HA Owner n=705



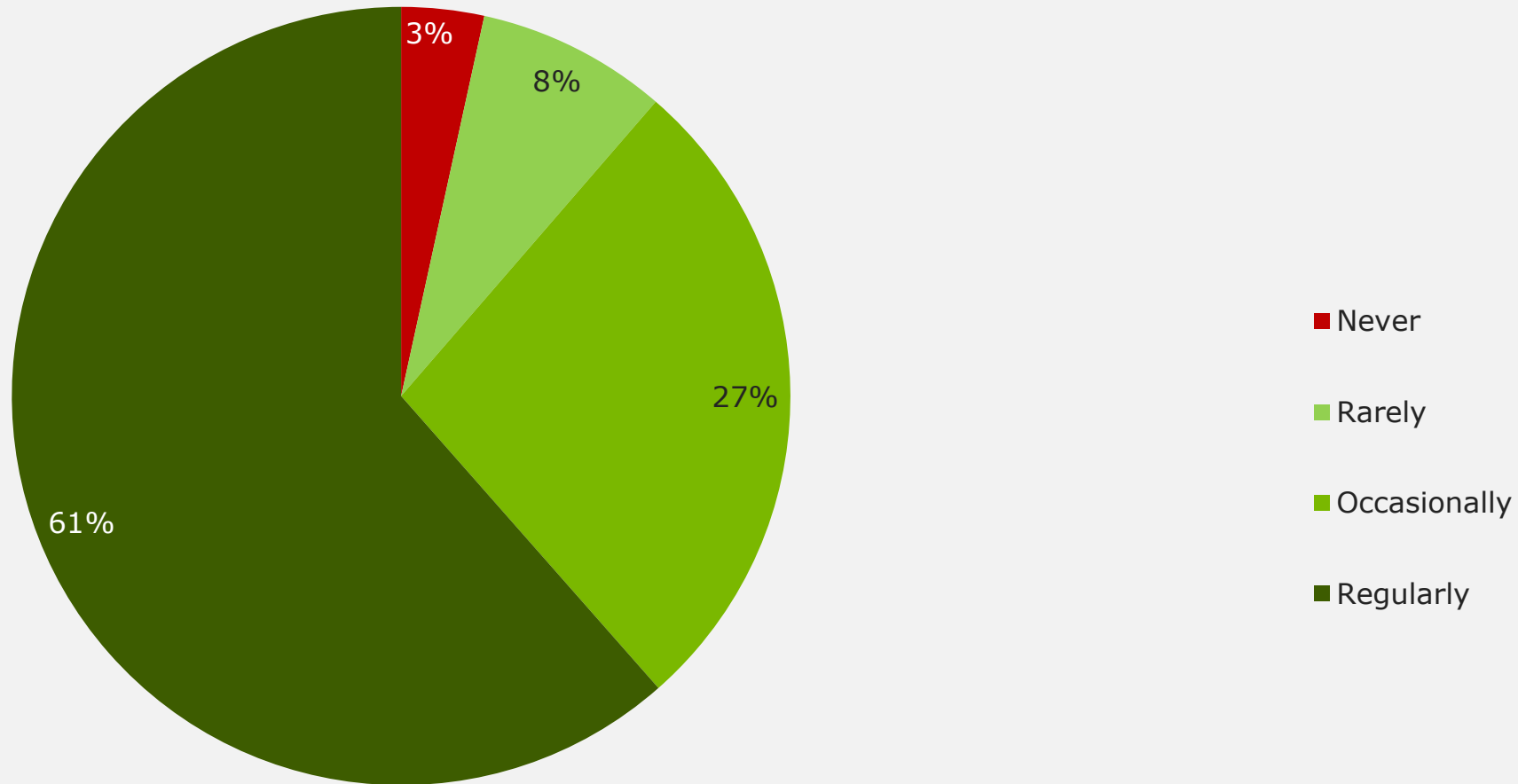
When someone with hearing loss wears hearing aids, it also improves the situation for others in the household

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



97% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

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



HA Owner n=705

4. Analysis of hearing impaired non-owners

To analyze reasons for non-adoption, we will examine the top 50% HL group, as their hearing loss structure is more similar to that of HA owners

Hearing loss characteristics: Owners compared to Non-owners

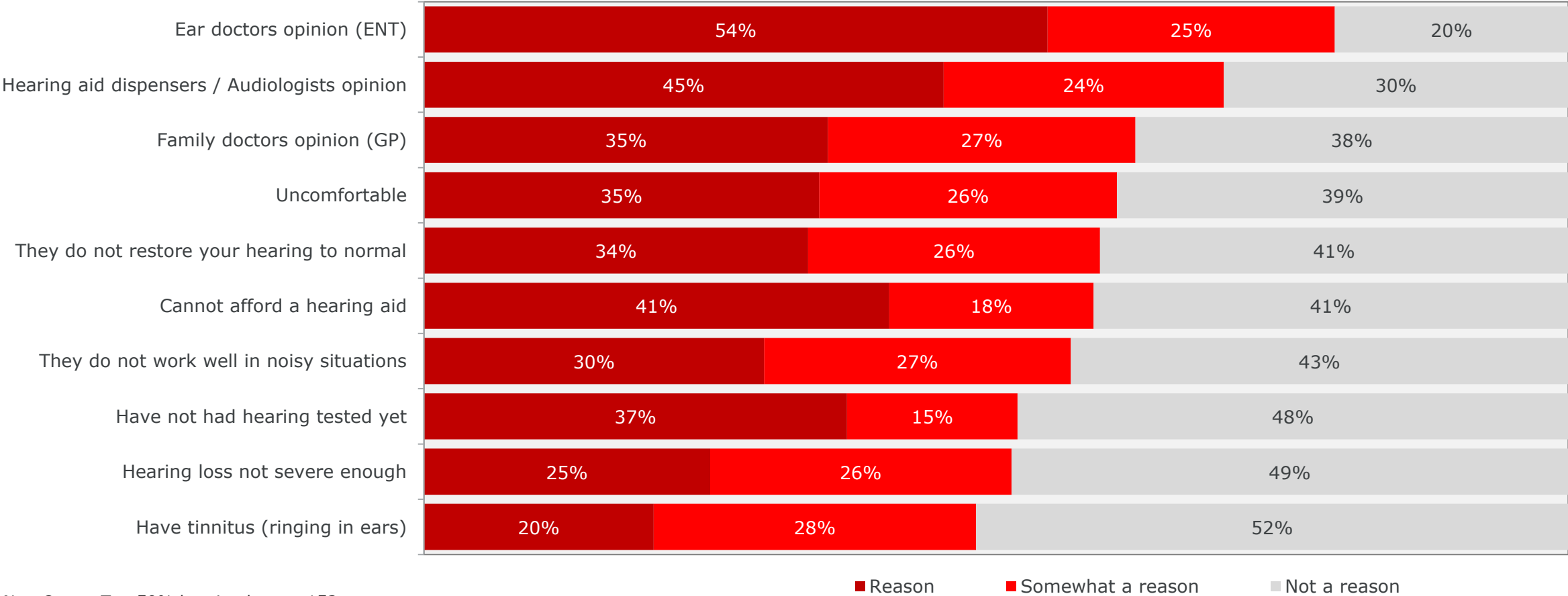
	HA Owner n=705	HA Non-owner low 50% HL n=325	HA Non-owner Top 50% HL n=153
Ears impaired (stated)			
Unilateral loss	22%	45%	27%
Bilateral loss	78%	55%	73%
Perceived loss			
Mild	8%	32%	5%
Moderate	55%	60%	62%
Severe	33%	7%	29%
Profound	4%	1%	5%

More similar hearing loss-structure



Reasons for not having hearing aids

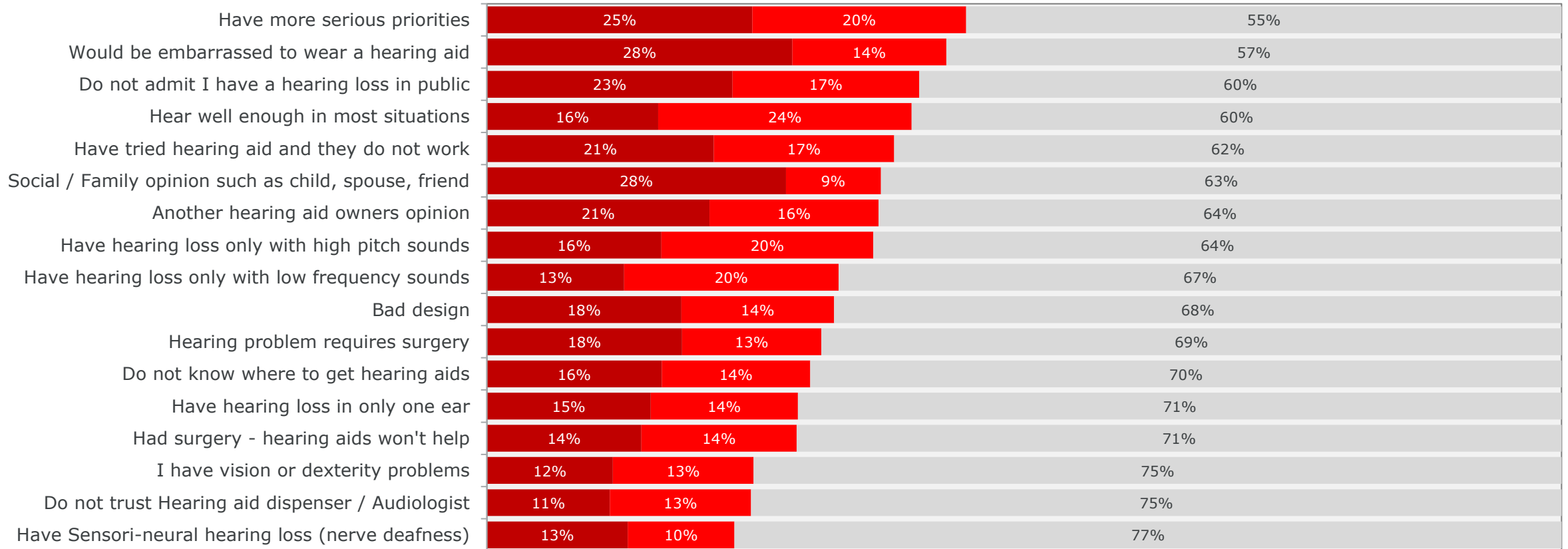
Top 10 reasons for not having a hearing aid



Non-Owner Top 50% hearing loss n=153



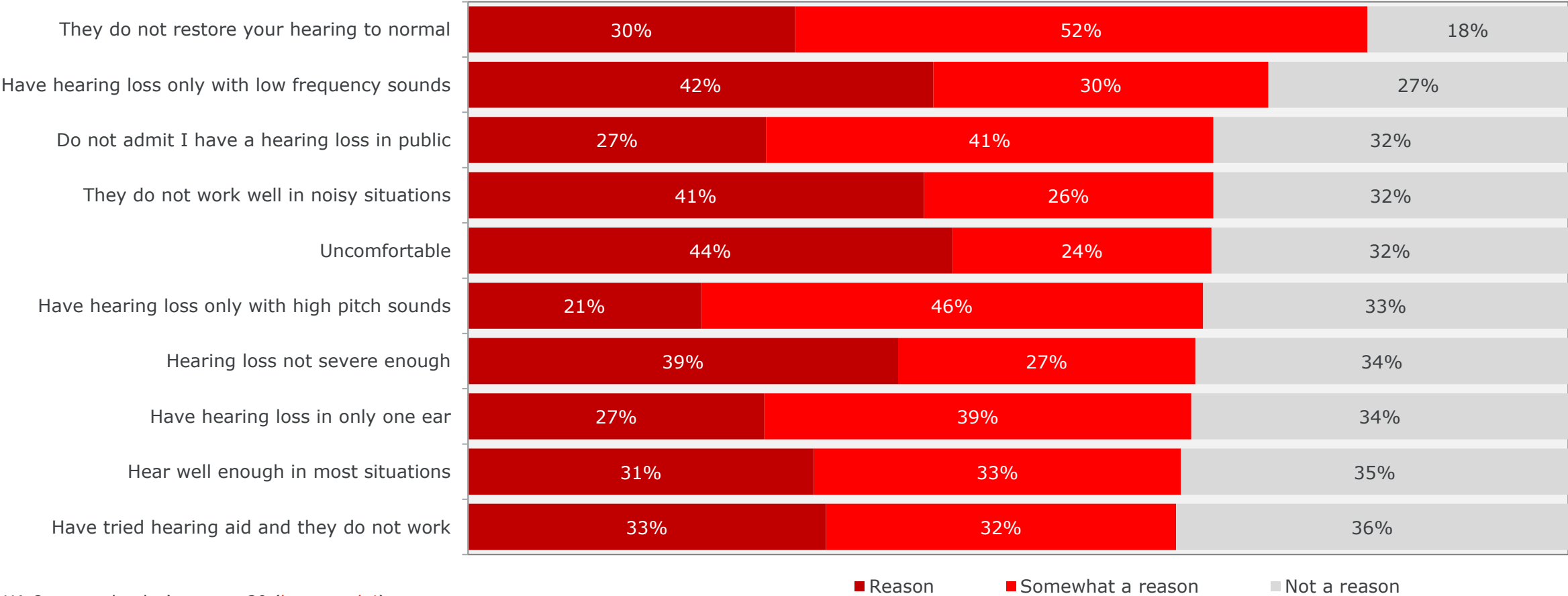
Less important reasons for not having a hearing aid



Non-Owner Top 50% hearing loss n=153

■ Reason ■ Somewhat a reason ■ Not a reason

Top 10 reasons for HA owners NOT using them



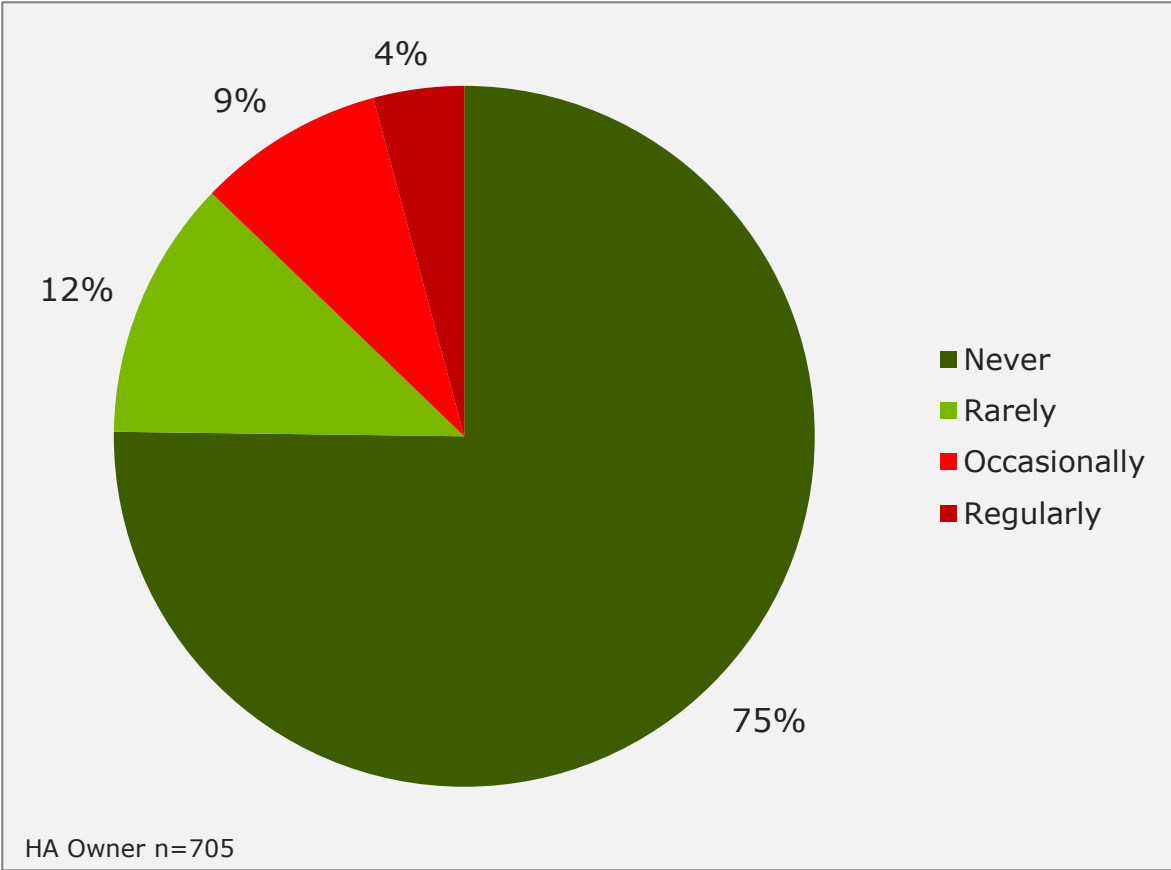
HA Owners who don't use, n=30 (low sample!)

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

75% 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

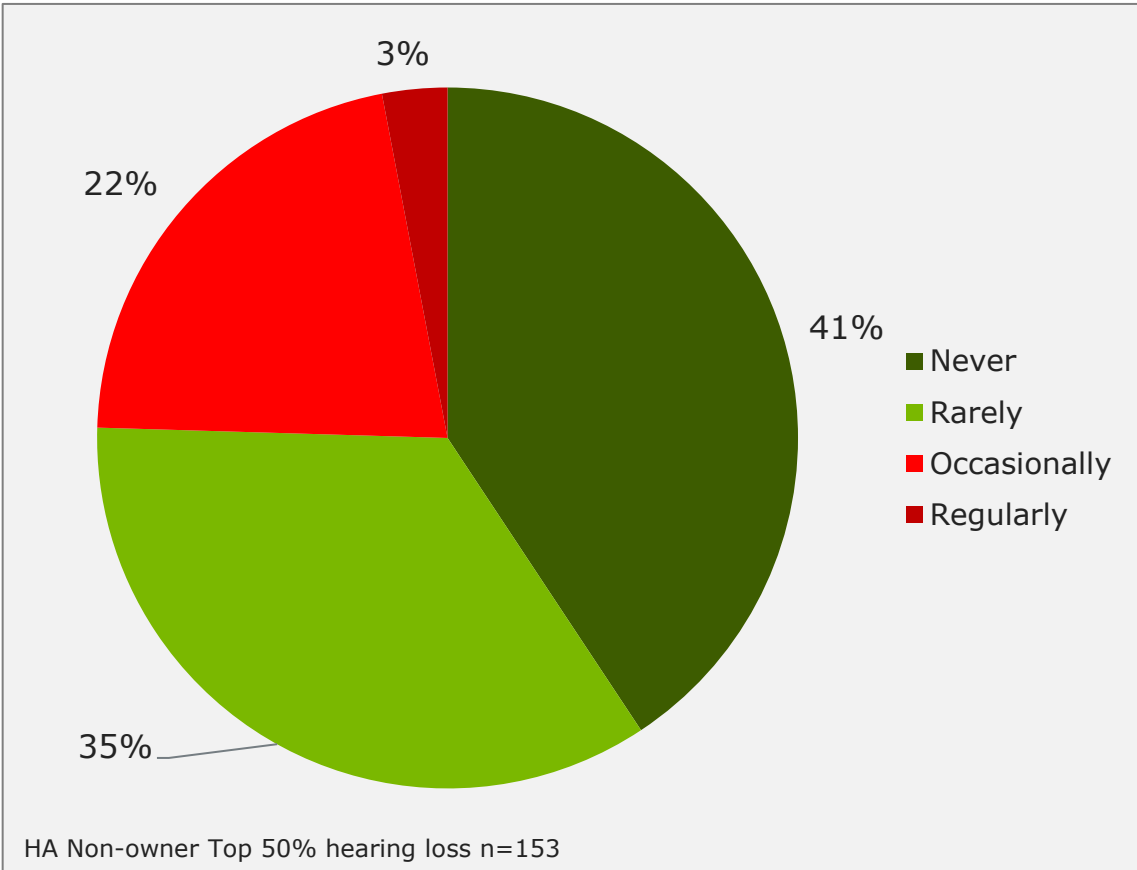
HA Owner:

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



HA Non-owner:

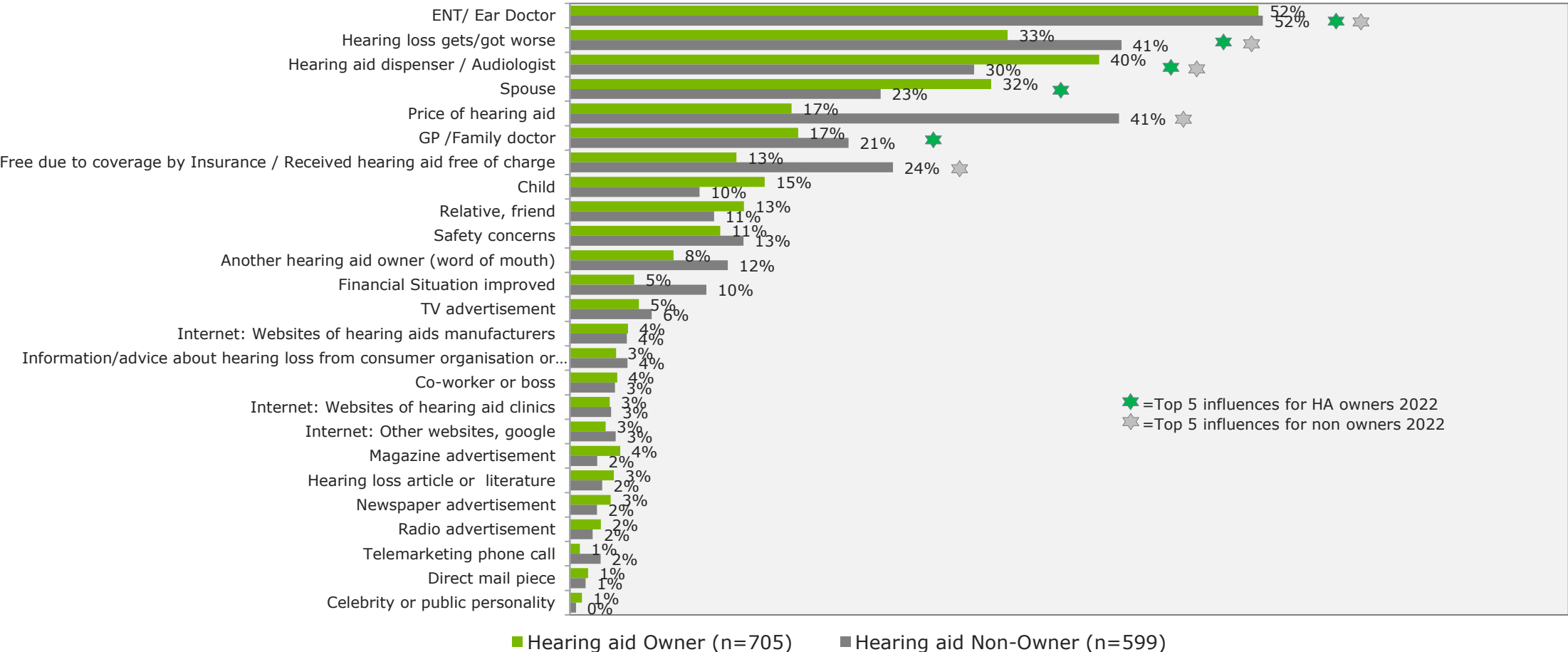
How often do you feel you are made fun of or rejected because of your hearing loss?



Most important triggers to buy

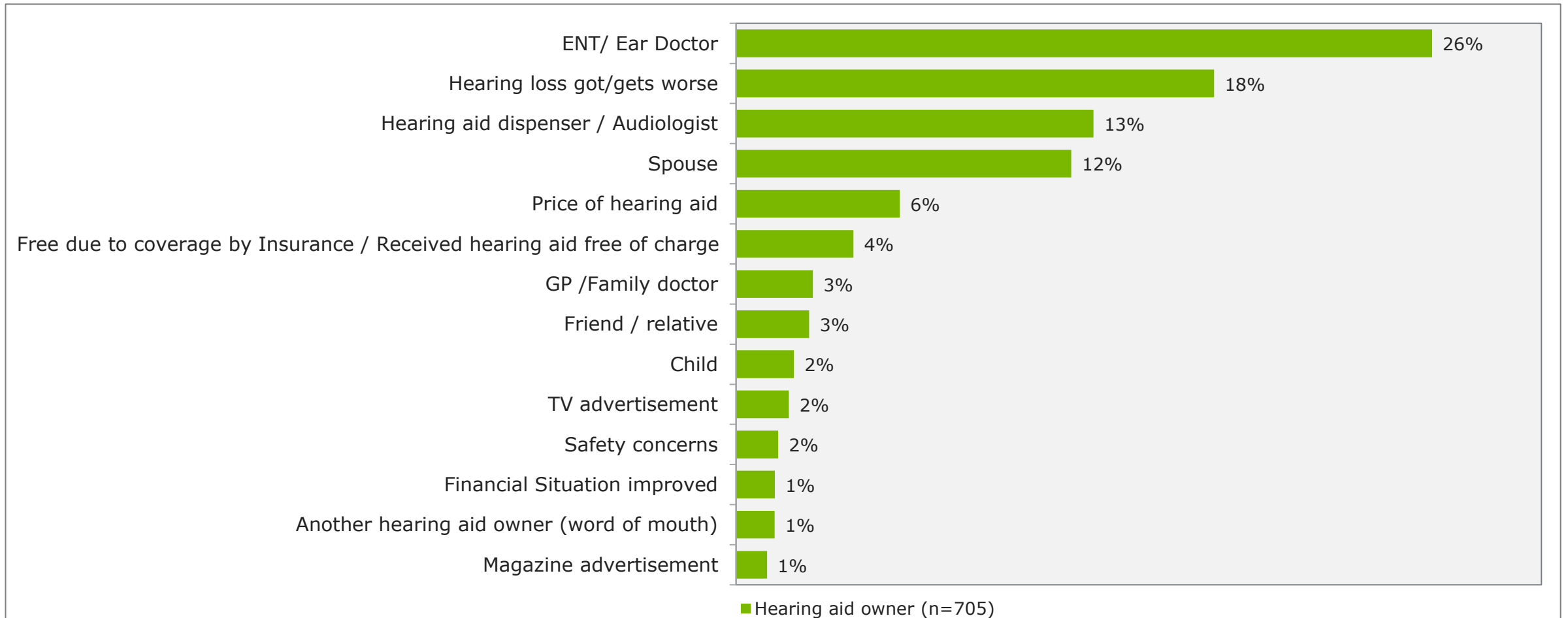
The most important factors influencing the decision to get hearing aids are recommendations from ENTs, worsening hearing loss, and guidance from audiologists. Additionally, price and insurance coverage play a role, especially for those who do not yet own hearing aids.

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 crucial trigger to buy a hearing aid is the ENT

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



Provided by:



Stefan Ruf lic. rer. pol.

Anovum GmbH
Chalenstrasse 8a
CH-8123 Ebmatingen

Telefon +41 (0)44 576 76 77
Mobil +41 (0)78 717 88 01
Email stefan.ruf@anovum.com

www.anovum.com



Dr. Stefan Zimmer ▪ Secretary General
European Hearing Instrument Manufacturers Association
Herriotstrasse 1 ▪ 60528 Frankfurt am Main ▪ Germany
sz@ehima.com ▪ +49-69-664 26 34 10 ▪ www.ehima.com



Peter Heil

Anovum GmbH
Chalenstrasse 8a
CH-8123 Ebmatingen

Telefon +41 (0)44 576 76 76
Mobil +41 (0)79 757 57 46
Email peter.heil@anovum.com

www.anovum.com

APPENDIX

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	7'332	10.4%	52.5%	48.7%	56.2%	49.9%
	Female	7'607	9.0%	58.8%	51.3%	43.8%	50.1%
Age							
	1 - 14	2'565	3.2%	56.4%	18.4%	5.6%	5.8%
	15 - 24	1'815	3.2%	40.7%	13.0%	5.3%	2.9%
	25 - 34	1'725	4.8%	50.7%	12.2%	6.3%	5.2%
	35 - 44	1'781	6.6%	44.6%	12.3%	10.1%	6.5%
	45 - 54	1'842	7.1%	45.1%	12.7%	11.2%	7.4%
	55 - 64	1'880	11.0%	48.5%	12.4%	16.6%	12.5%
	65 - 74	1'679	16.7%	56.1%	10.4%	19.2%	19.6%
	75+	1'652	29.4%	66.0%	8.6%	25.8%	40.0%
Type of household							
	single household	1'837	15.4%	59.1%	11.5%	18.0%	20.9%
	Couple, no kids	3'781	14.0%	57.7%	24.1%	34.9%	38.2%
	Couple with kid(s)	6'667	5.9%	51.0%	46.5%	29.9%	25.0%
	Single mom/dad with kid(s)	1'265	5.9%	41.4%	8.8%	6.8%	3.9%
	Retirement home, hospital etc.	198	33.0%	64.8%	1.0%	3.6%	5.3%
	Other	1'192	8.3%	55.4%	8.1%	6.8%	6.8%

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)	6'878	14.1%	55.5%	43.8%	67.2%	67.3%
The spouse of the head of the household	3'379	9.6%	58.6%	22.6%	20.8%	23.7%
Daughter/son of head of household	3'903	2.5%	43.7%	28.2%	8.7%	5.4%
Other person	778	6.5%	58.0%	5.4%	3.3%	3.7%
Employment						
Full time employed	5'355	6.8%	47.3%	46.1%	31.6%	22.8%
Part time employed	799	8.0%	46.0%	6.8%	5.7%	3.9%
Unemployed / not working	1'166	7.5%	42.1%	10.0%	8.4%	4.9%
Retired under a disability pension scheme (fully or partly)	345	19.3%	63.1%	2.6%	4.1%	5.6%
Early retired under an early retirement benefit scheme	319	15.2%	67.3%	2.5%	2.6%	4.3%
Retired (at the official retirement age)	3'181	22.3%	61.1%	22.9%	45.5%	57.6%
Student / pupil / in training	1'011	1.9%	34.5%	9.2%	2.1%	0.9%
Education						
Brevet	1'220	16.0%	59.7%	9.5%	13.0%	15.5%
CAP-BEP	2'299	14.7%	55.6%	18.1%	24.8%	25.0%
Baccalauréats	2'749	9.3%	54.3%	23.1%	19.2%	18.4%
BTS - DUT	1'453	8.6%	50.1%	12.3%	10.3%	8.4%
License (BAC+3)	1'514	7.9%	48.7%	12.9%	10.1%	7.7%
Master 1 et 2 - Diplôme d'Ingénieur	1'347	8.3%	50.5%	11.4%	9.1%	7.5%
Doctorat	296	12.1%	63.9%	2.4%	2.1%	3.0%
Other	883	13.9%	58.9%	7.0%	8.3%	9.6%

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	
	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