

## Results

# EuroTrak Italy 2018

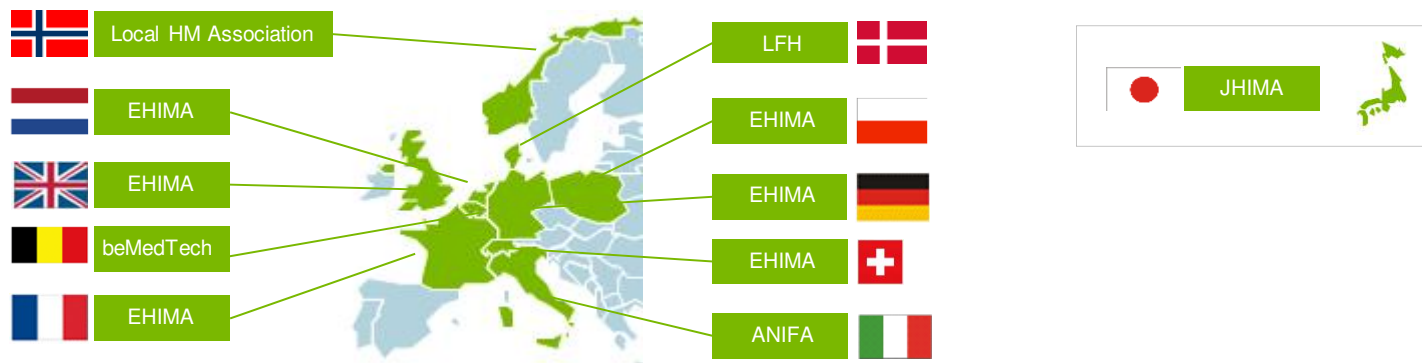
1. Introduction
2. Market overview
3. Analysis of hearing aid owners
4. Analysis of hearing impaired non-owners
5. Appendix

# Summary

## 1. Introduction

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- EuroTrak Italy 2018 was designed and executed by Anovum (Zurich) on behalf of ANIFA.
- Sample sizes Italy 2018:
  - Representative sample (sample 1): n=15'015 people
  - Hearing impaired (sample 2): n=1'332 people
    - Hearing impaired non-owners: n= 823 people with hearing loss (**HL**)
    - HA owners: n= 509 people with hearing aid (**HA**)
- EuroTrak Italy 2018 is part of the EuroTrak studies:



# Summary

## 2. Market overview

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- Stated hearing loss prevalence
  - Total: 12.1%, 18+: 14.0% (2015: 11.7%, 18+: 13.6%).
  - Binaural hearing loss: HA owners: 65%, HA non-owners: 60%.
  - Hearing Tests: 38% (2015: 31%) had a hearing test in the last 5 years, most tests done by ear doctors
- Hearing aid adoption rate (HA penetration)
  - Total: 29.5% (2015: 25.2%).
  - Total age group 18+: 28.7% (2015: 23.9%).
  - 61% of HA owners have binaural treatment.
- The route to the hearing aid
  - 80% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 58% got hearing aids recommended from the ENT or family doctor (drop out rate=27% / 2015: 35%).
  - 27% of the GP consultations referred to an hearing aid dispenser (2015: 20%).
  - 78% of the GP consultations referred to an ENT, 5% recommended no action.
  - 40% of ENT consultations referred to a audiologist, 31% (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.
  - Quality of sleep seems to improve if hearing impaired use hearing aids.

# Summary

## 3. Analysis of hearing aid owners

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- Hearing aid ownership, usage and accessories
  - 57% of all HA owners received some kind of 3<sup>rd</sup> party reimbursement.
  - 51% of the currently owned HAs were bought in the last two years.
  - The average age of the currently owned HAs is 2.9 years (2015: 2.5 years).
  - The median age of hearing aids before replacement is 4 years.
  - On average, HAs are worn 7.9 hours a day (2015: 8.4).
  - 52% of today's hearing aid owners are aware of their hearing aid brand.
  - 40% have been informed about hearing aid accessories by the HCP, 20% use a HA accessory.
- Importance of listening situations and satisfaction with HAs
  - 88% of the hearing aid owners say their hearing aid works better than or as expected
  - 81% (2015:79%) 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.
  - HA owners who received reimbursement are more satisfied than those who didn't.
  - Talking at home with family members, talking on a phone, watching TV with others and conversations are the most important listening situations.
- Positive impact of HAs
  - Significant positive impact of HAs on different aspects – especially communication, sense of safety relationships at home, participating in group activities and social life.
  - 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

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- Reasons not to own/use HAs
  - 24% 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 they are uncomfortable, they have more serious priorities, hearing loss is not severe enough and they would be embarrassed to wear one.
  - 6% who own HAs don't use them at all (0 hours); 11% use them less than one hour/day (0-1 hour).
- Social rejection, buying intentions and triggers to buy
  - 54% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid (only 23% say they are never made fun of because of their hearing loss).
  - The most important influencing factors for getting hearing aids are worsening hearing loss, ENT, audiologist and significant others. Insurance coverage/price of hearing aids is much more relevant for the non owners.

# Detailed Results: Roadmap

New topics for EuroTrak 2018 are highlighted in red

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## 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

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# 1. Introduction

# Organisation of EuroTrak 2018

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## Organisation

- Principal of the project EuroTrak Italy is ANIFA.
- 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

- ANIFA may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.
- The raw dataset remains at Anovum. If ANIFA 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 – Italy/2018/n=[relevant sample size]”**
- ANIFA member companies can ask Anovum to further analyse the raw data in specific ways at their own expense.
- ANIFA companies can order a report with satisfaction scores for their brand (if feasible). 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 ANIFA 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=15'015** 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=509** hearing aid owners and **n=823** hearing impaired non-owners

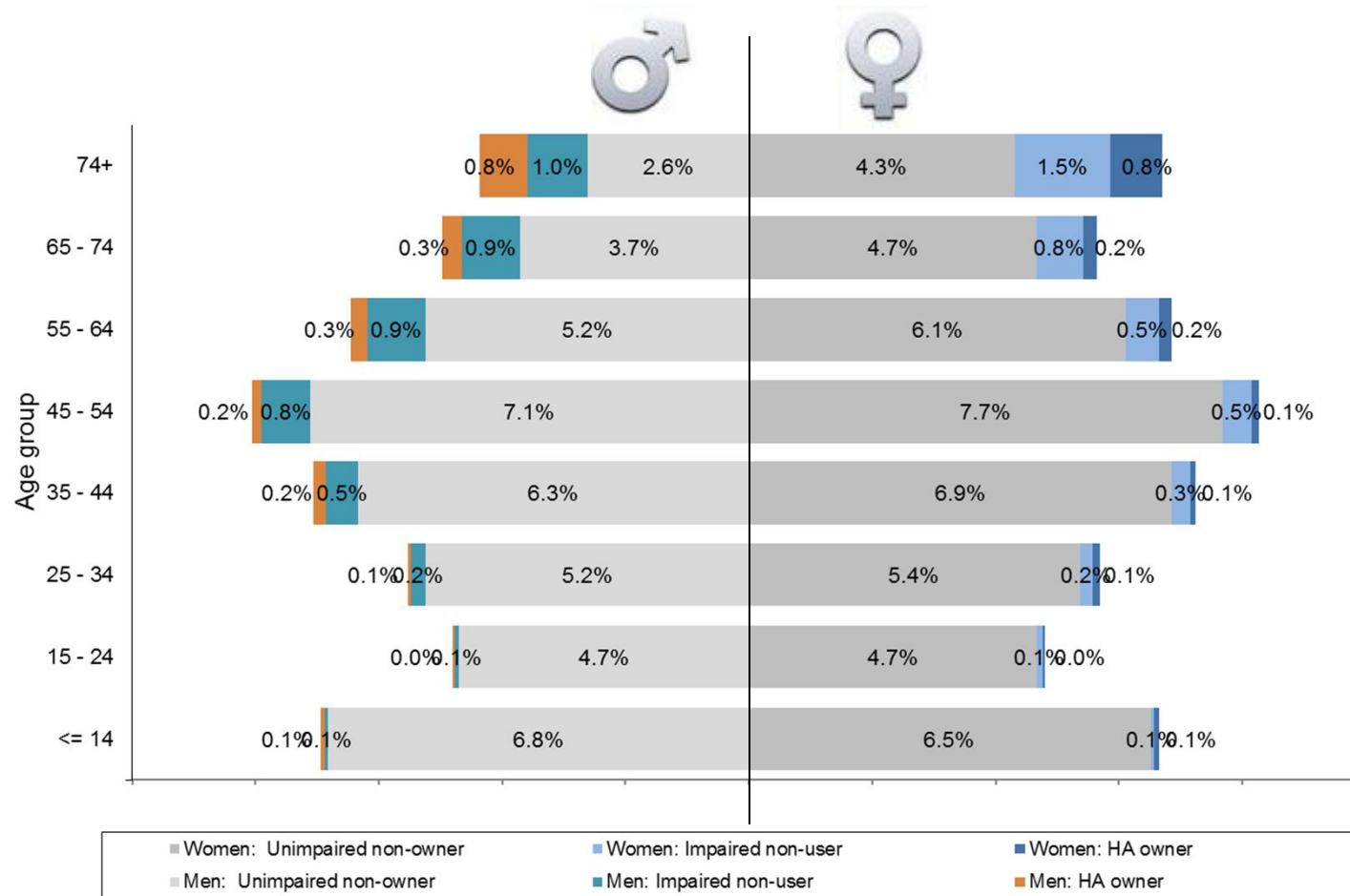
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## 2. Market overview

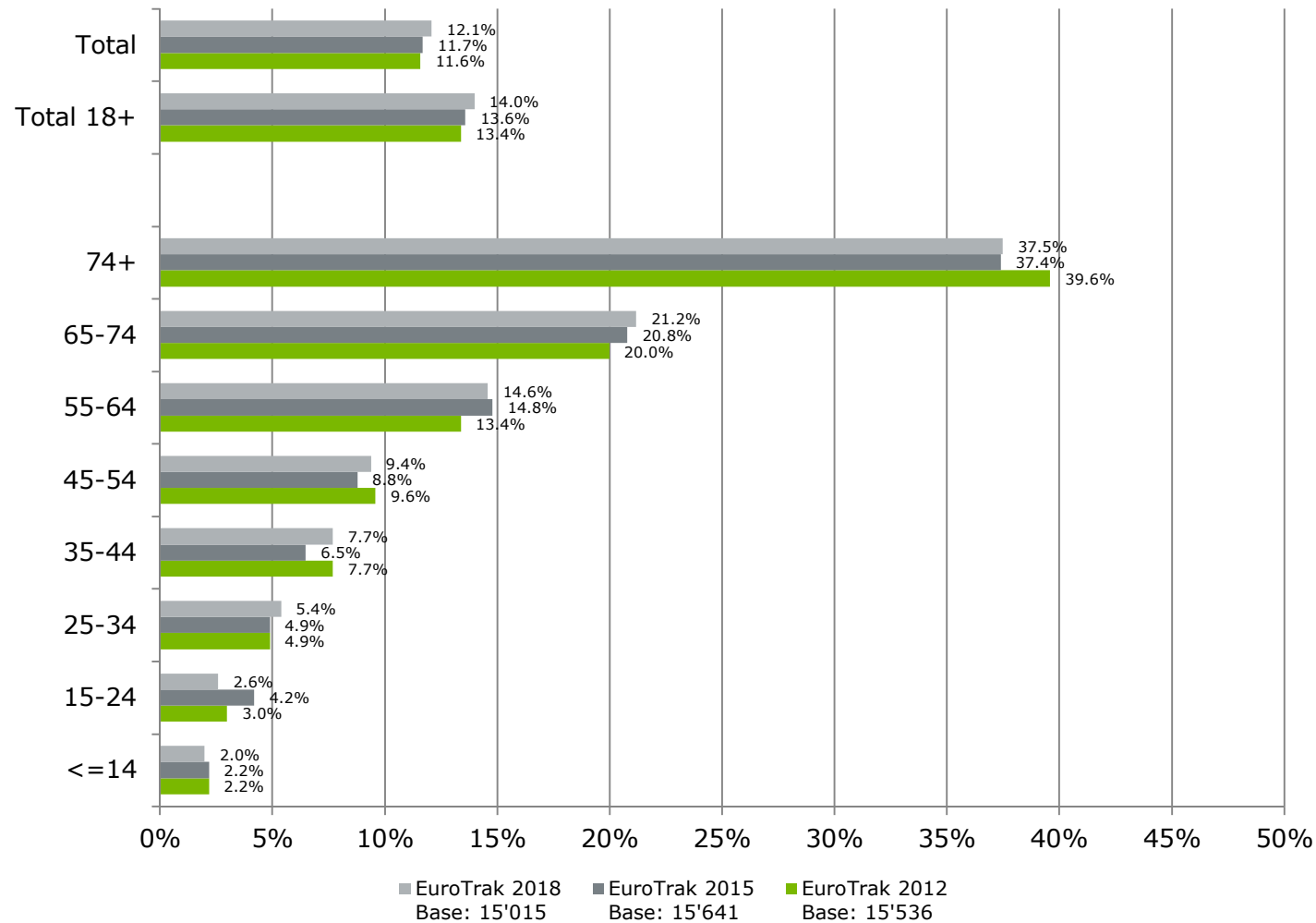
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# Prevalence of hearing loss and adoption rate

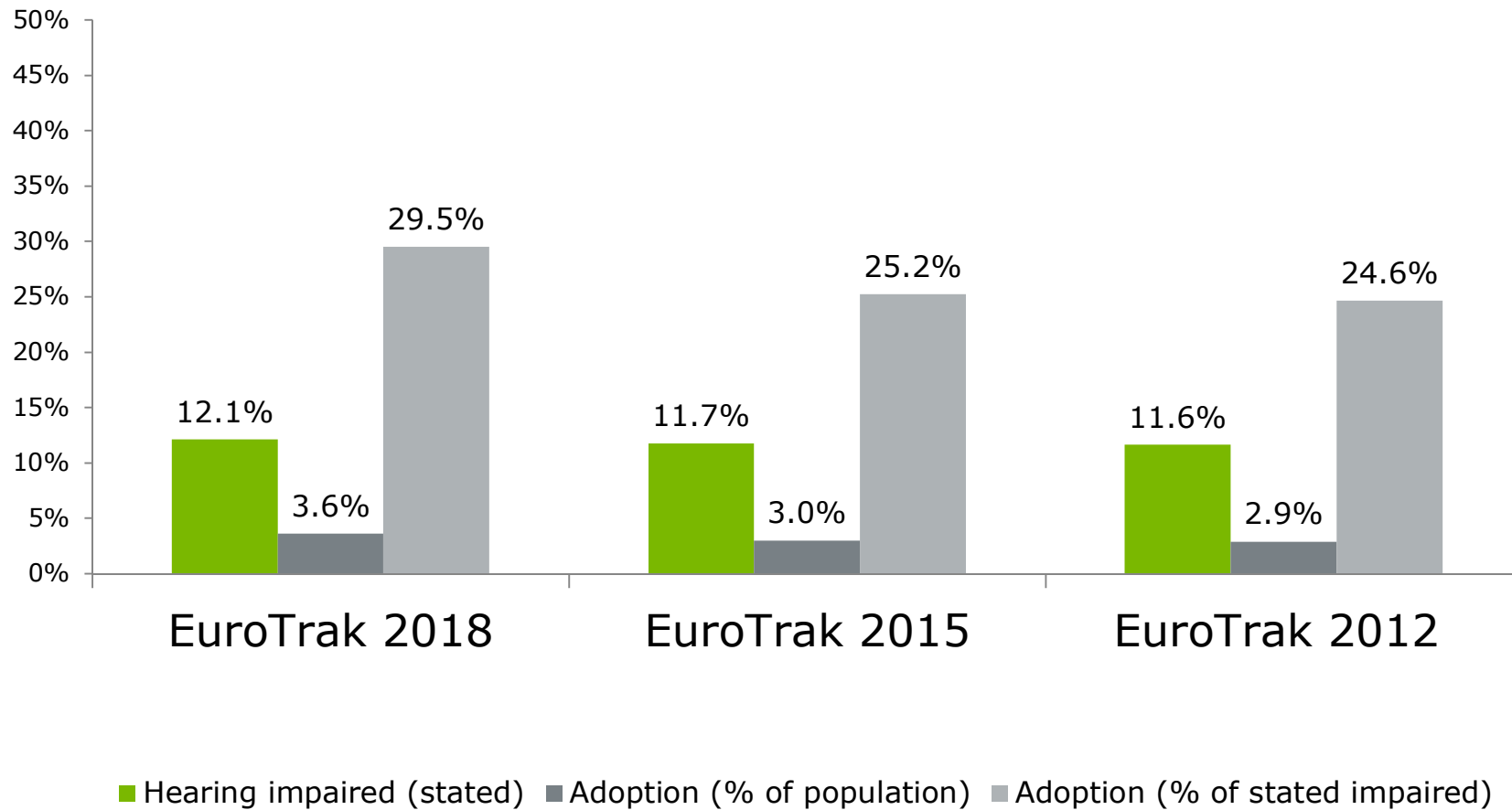
# Hearing loss and hearing instrument ownership by gender/age



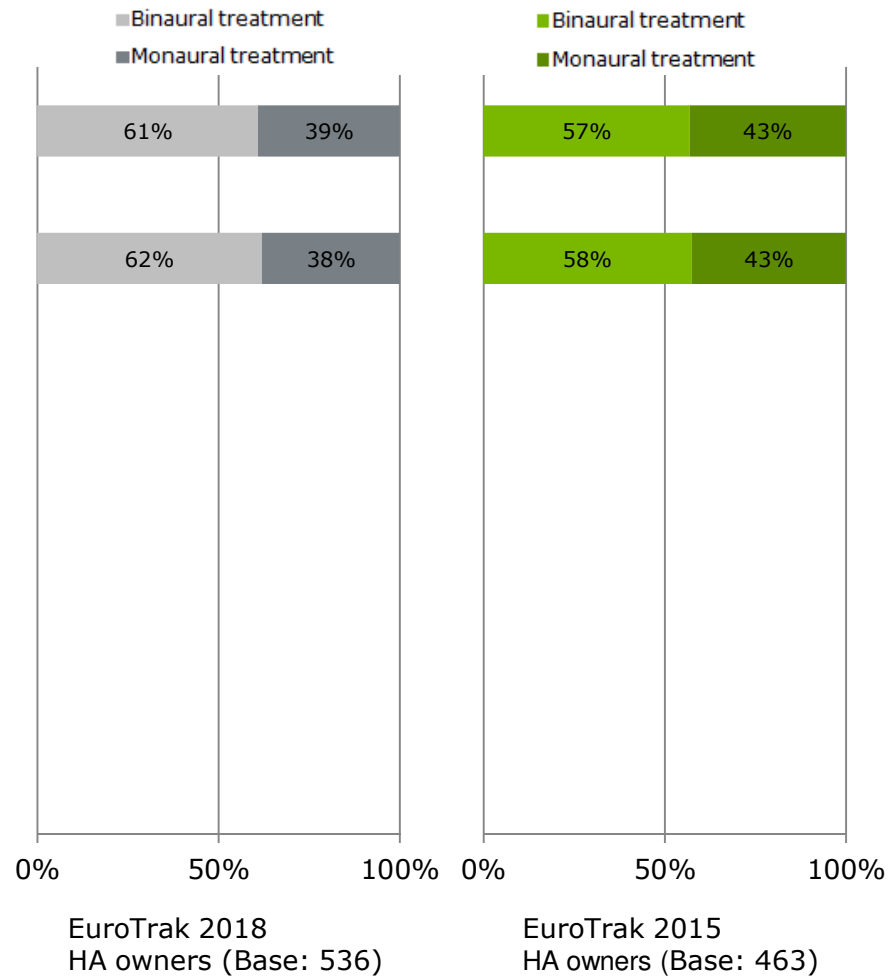
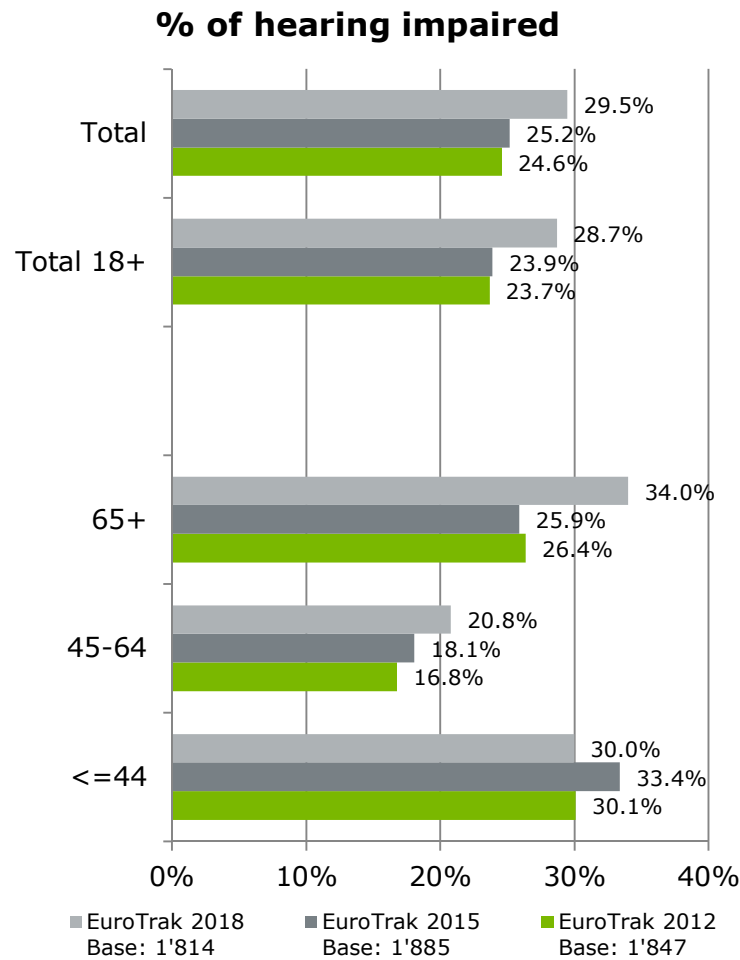
# Hearing loss prevalence Italy



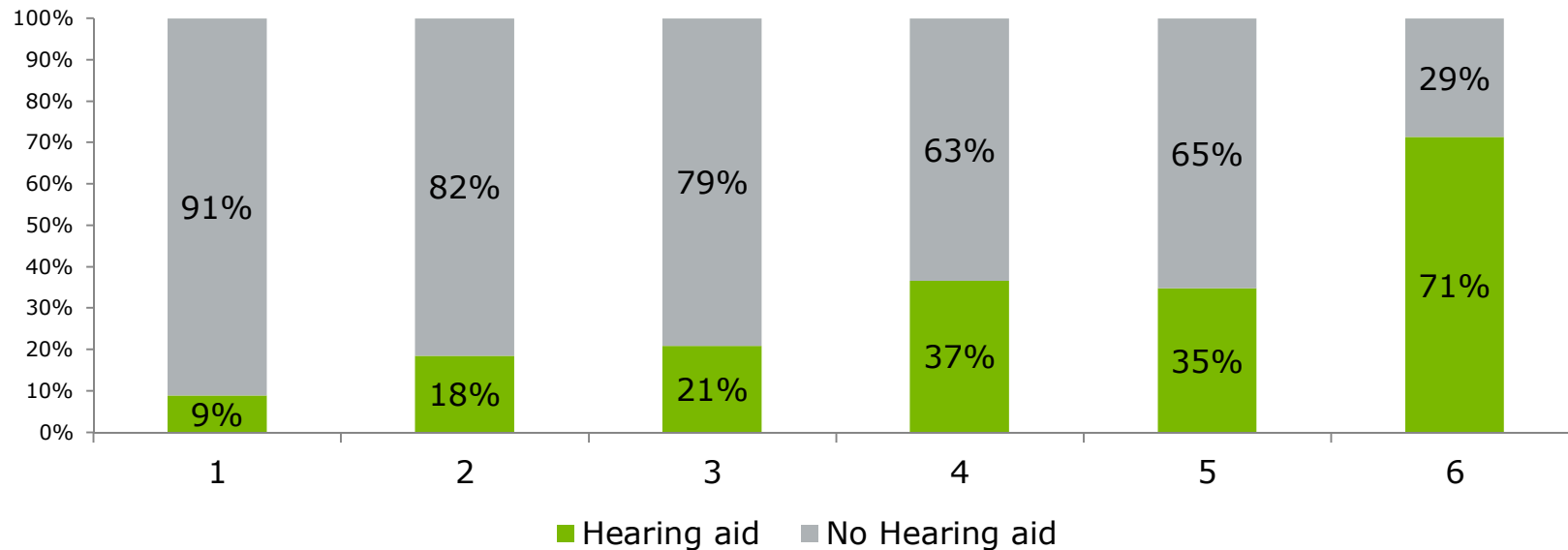
# Overview hearing loss prevalence and hearing aid adoption



# Hearing aid adoption rate Italy: 30% of hearing impaired have hearing aid(s), 61% of them have binaural treatment



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



Hearing loss 6-groups

HA-non-owner, n=823  
HA-owner, n=509

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

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

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





# Hearing loss

## Hearing loss characteristics: Owners compared to non-owners

	HA-Non-owner n=823	HA Owner n=509	Hearing Aid Adoption (%)
<b>Ears impaired (stated)</b>			
Unilateral loss	40%	35%	29%
Bilateral loss	60%	65%	33%
<b>Perceived loss</b>			
Mild	34%	8%	9%
Moderate	54%	54%	29%
Severe	9%	30%	57%*
Profound	3%	8%	

n's are unweighted whereas the shown results are weighted  
 \* combined `severe\_ and `profound\_ because n is too small

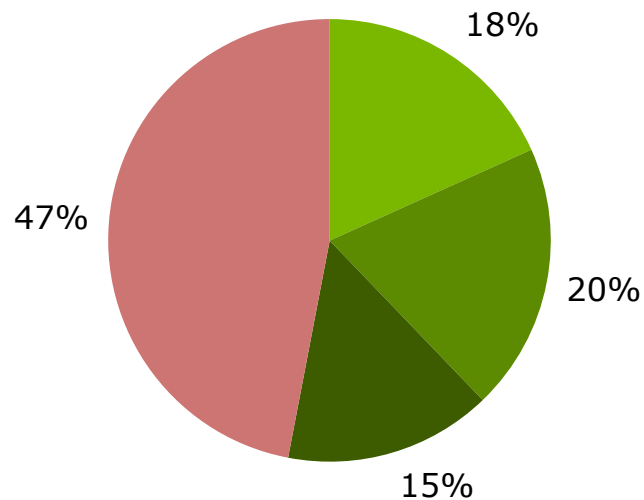
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# Hearing tests and where hearing is tested

# Hearing Tests: 38% (2015: 31%) had a hearing test in the last 5 years, most tests done by ear doctors

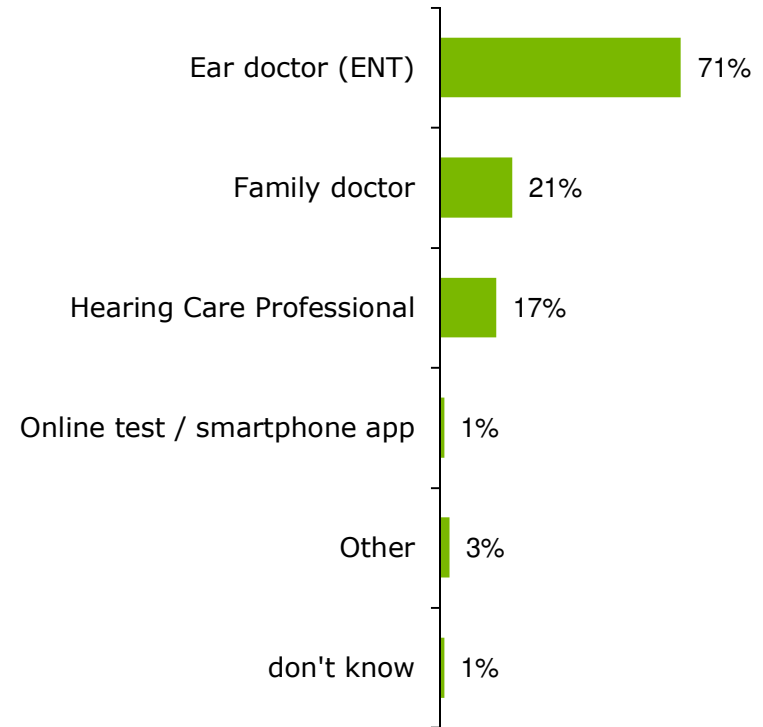
Have you ever taken a hearing test?

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



Base=13'324

Where/how was your hearing tested?



Base= 5'040

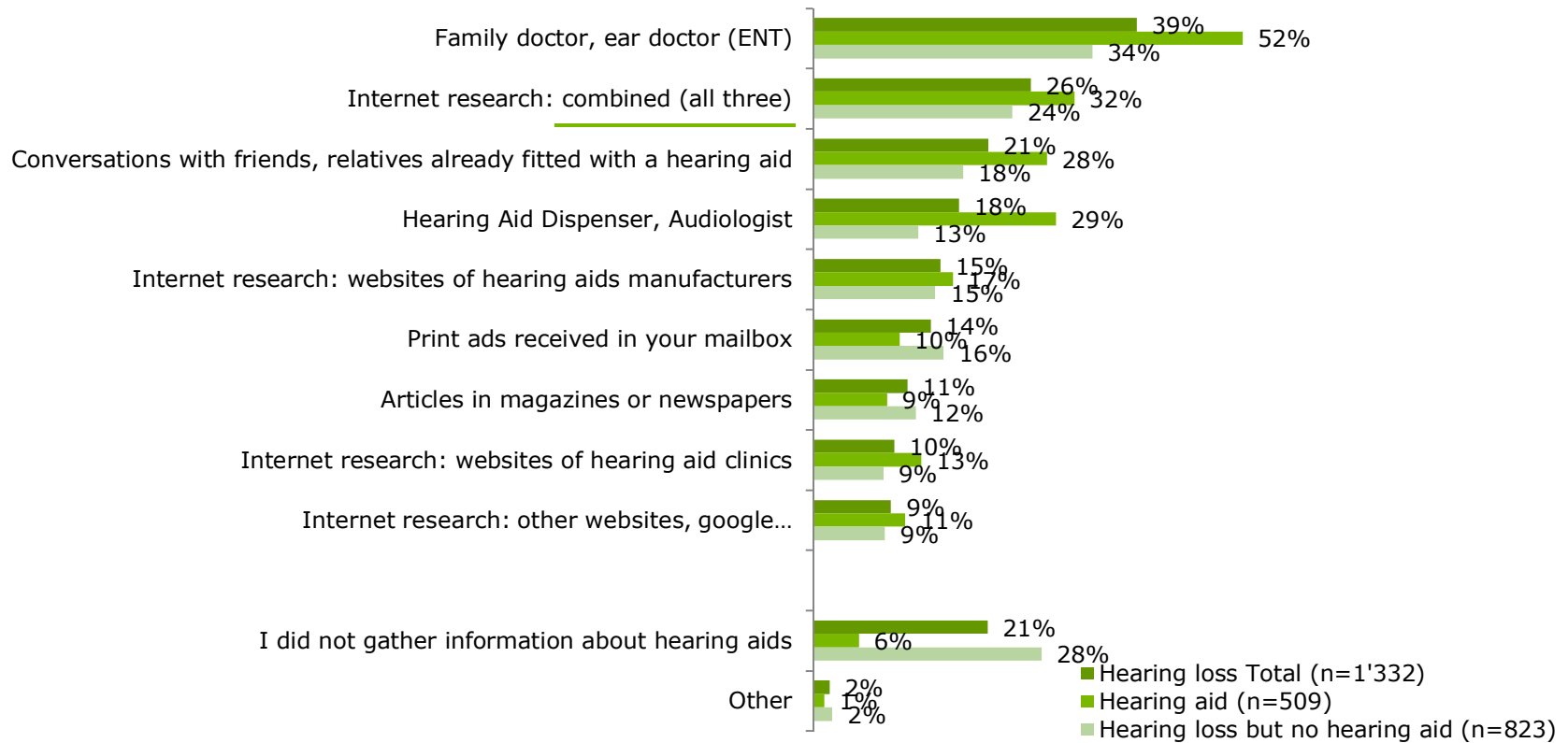
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# The route to the hearing aid: Sources of information and drop-out rates

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

Where did you gather information about hearing aids?

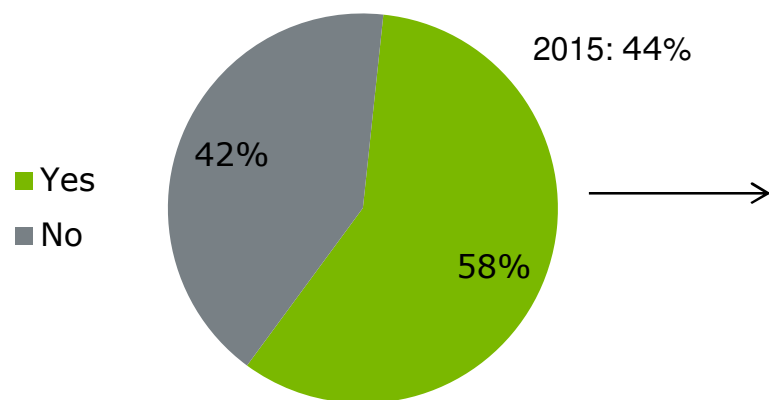
Please check all that apply.



# 58% of all hearing impaired have seen hearing aids advertisement recently, which is more than in 2015 (44%)

## Have you recently seen any advertisement regarding hearing aids?

('Recentemente ha visto pubblicità riguardanti il tema degli apparecchi acustici?')



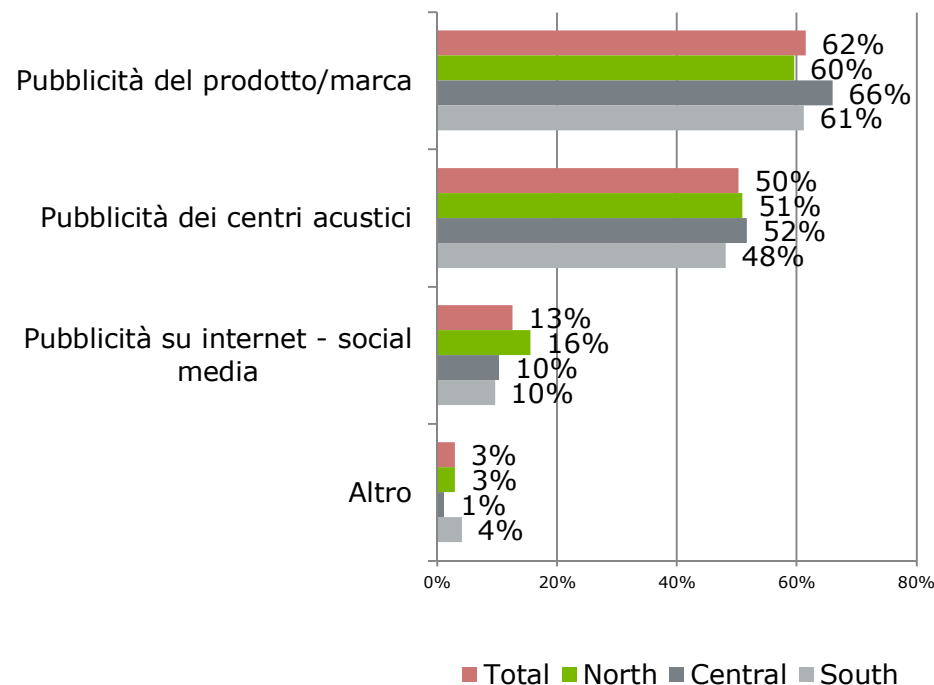
Percentage of „Yes“ by region:

- Region North: 63%
- Region Central: 58%
- Region South: 53%

Hearing impaired, n=1'332

## The advertisement you have seen was:\*

('La pubblicità che ha visto/sentito era:')



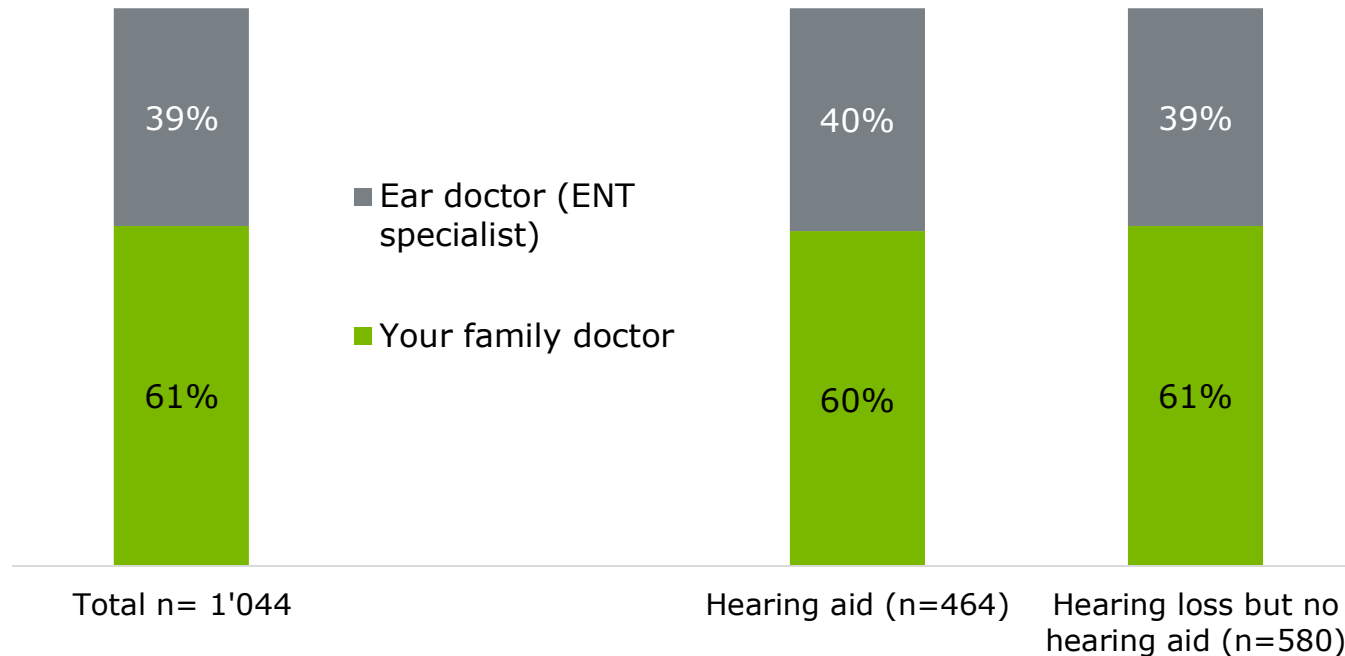
Italy specific question

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

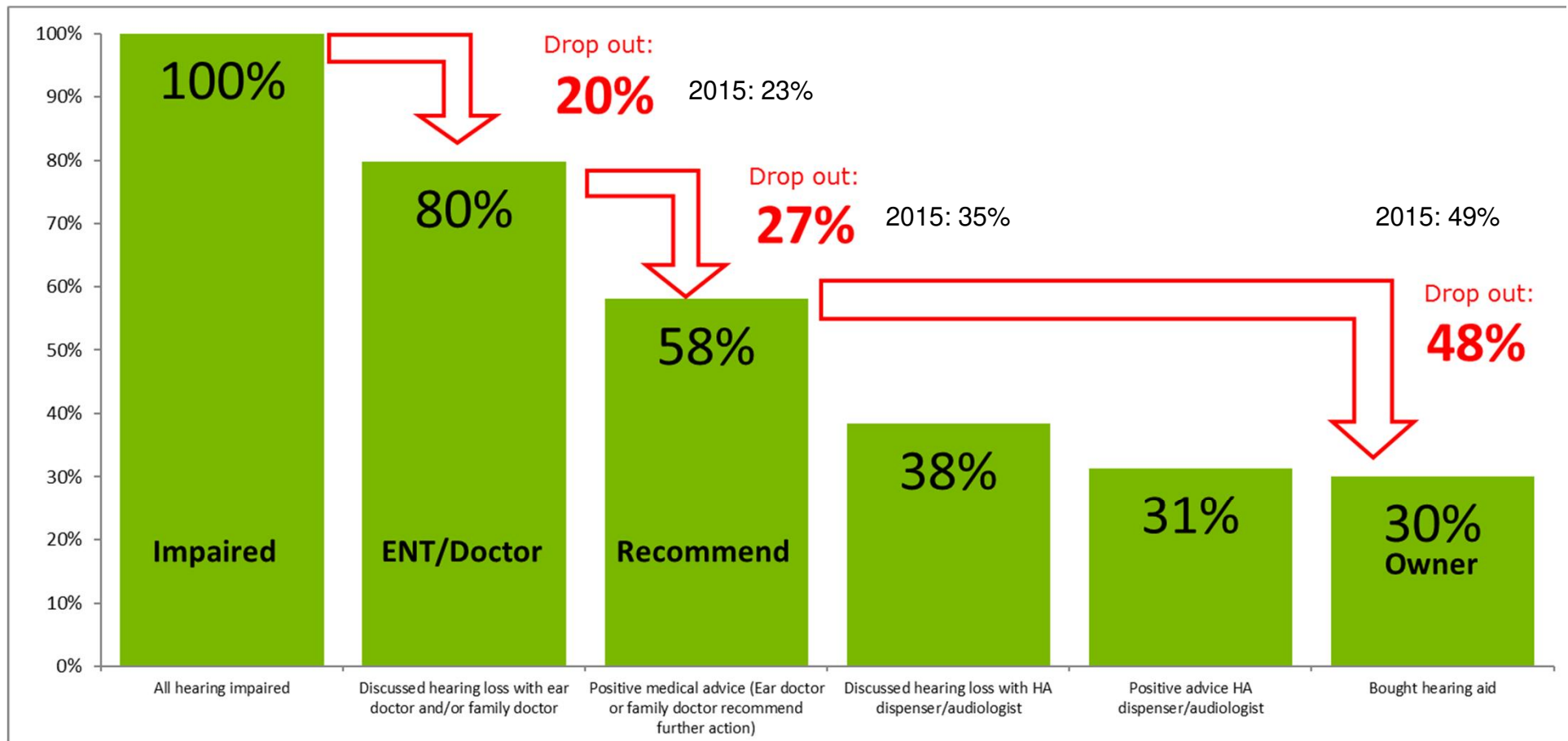


# Of those who discussed the hearing loss with a doctor, 39% talked to an ENT first and 61% talked to the family doctor first

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



# The route to the hearing aid: Compared to 2018 drop out 2 was reduced



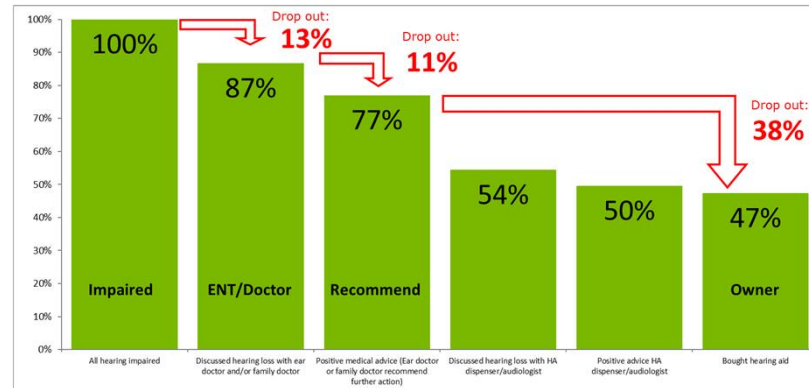
Base: n=1'332



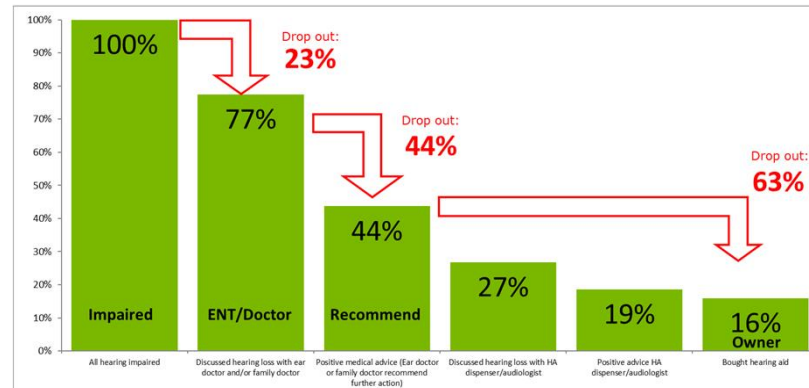


# Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss\*



Low 50% hearing loss\*



Base: n=1'332

\* 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:

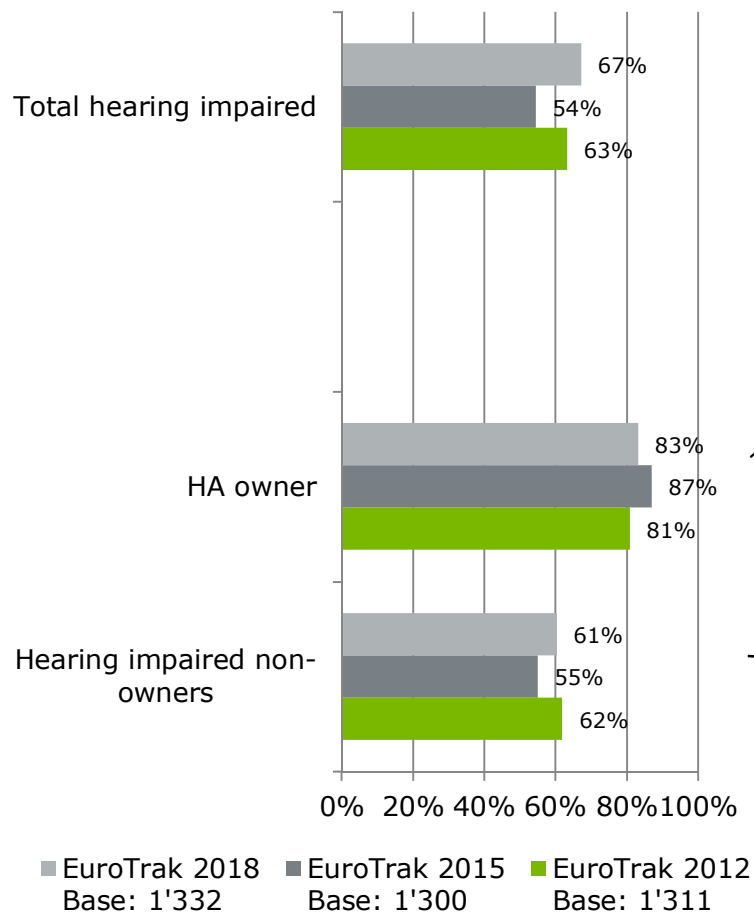
- Number of ears impaired (one or two)
  - Stated hearing loss (Mild to Profound)
  - Scores on 6 APHAB-EC - like questions (Scaled 1-5)
  - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).



# The route to the hearing aid: GP/Family doctor

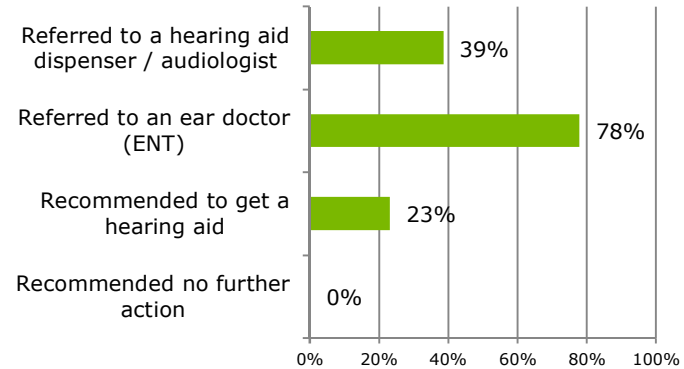
## Have you discussed your hearing problem with your family doctor?

**% Discussed with GP**

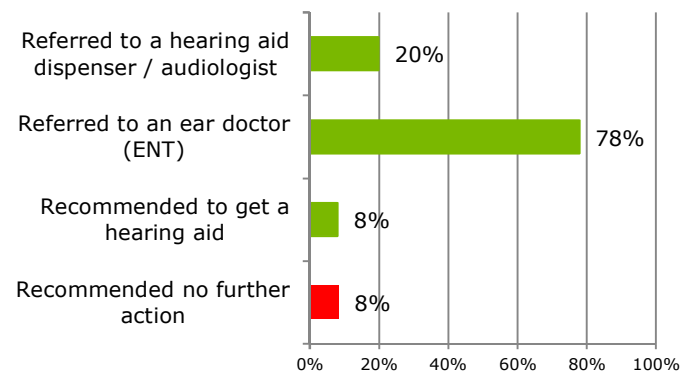


**What did he/she recommend ?**

**HA owner (Base: 319)**



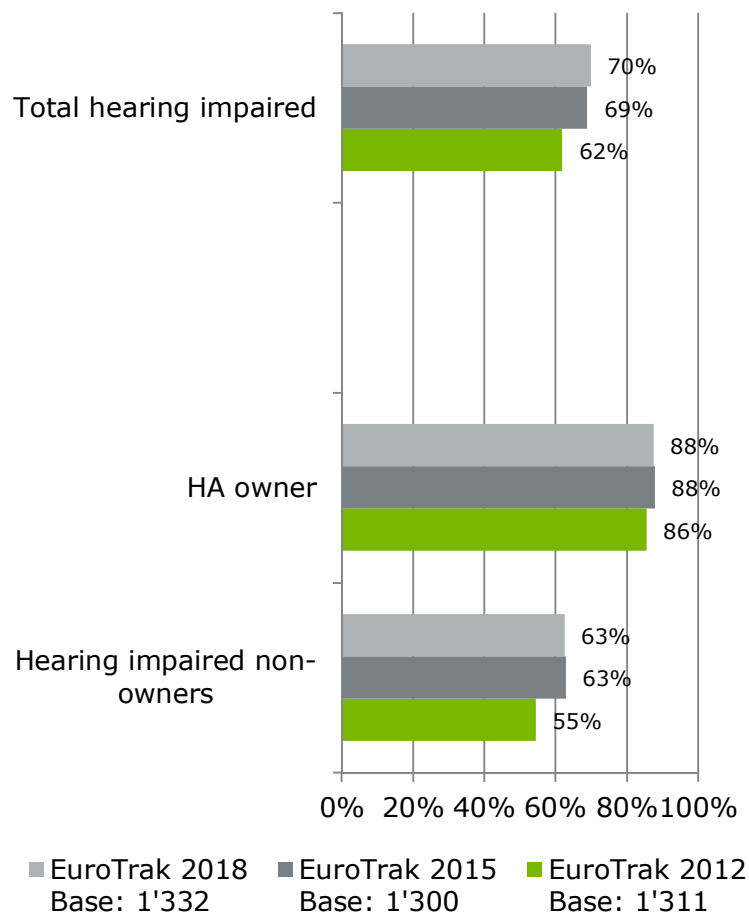
**Impaired non-owner (Base: 552)**



# The route to the hearing aid: ENT

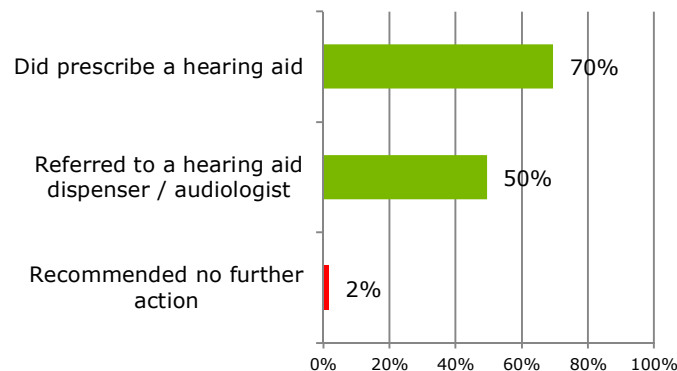
Have you discussed your hearing problem with an ear doctor (ENT)?

**% Discussed with ENT**

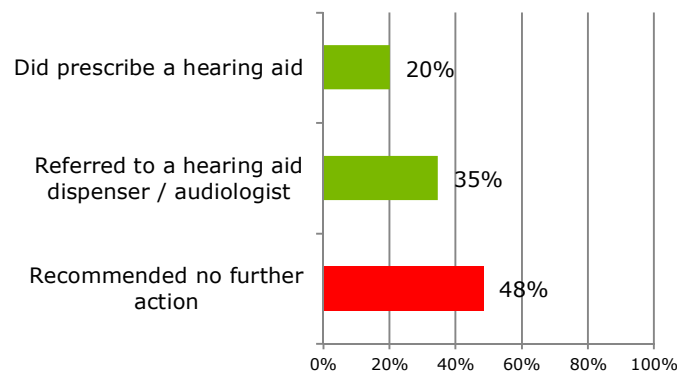


**What did he/she recommend ?**

**HA owner (Base: 336)**



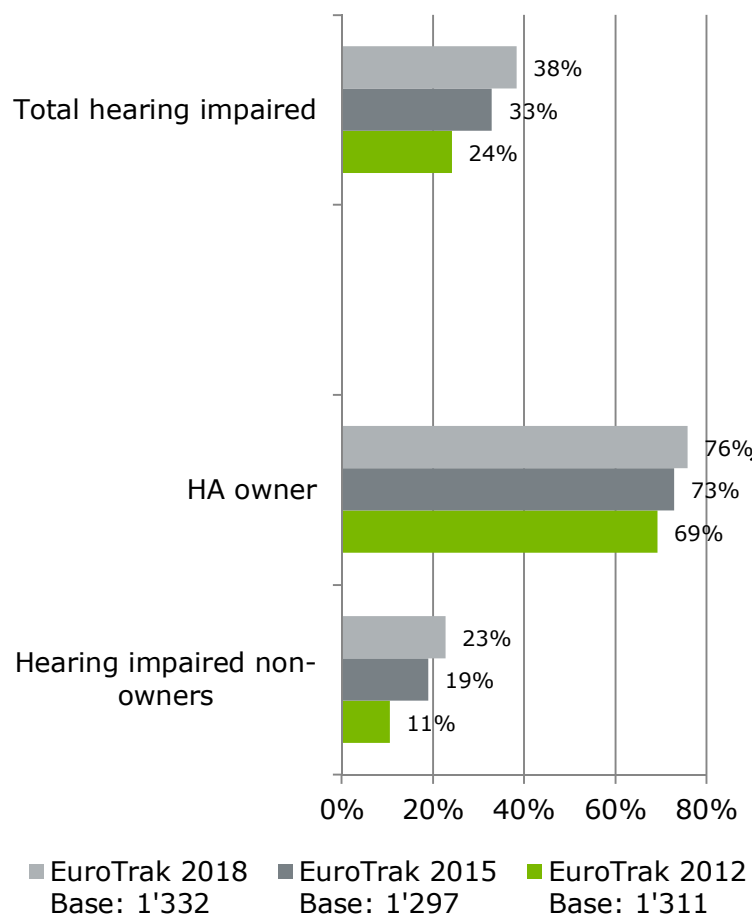
**Impaired non-owner (Base: 580)**



# The route to the hearing aid: HA dispenser

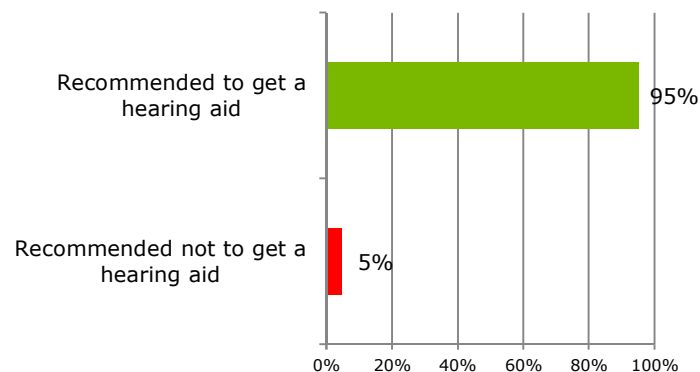
## Have you discussed your hearing problem with a Hearing Aid Dispenser/Audiologist?

**% Discussed with Audiologist**

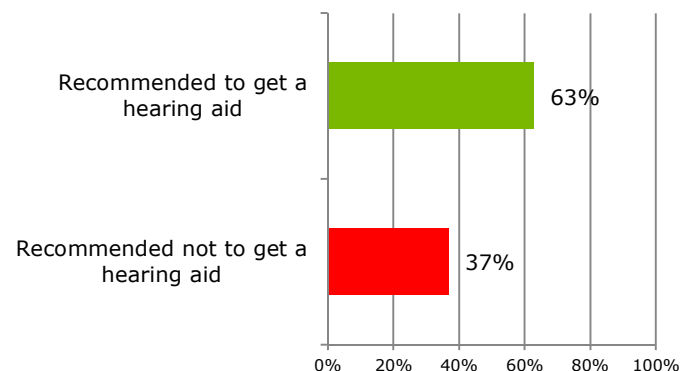


**What did he/she recommend ?**

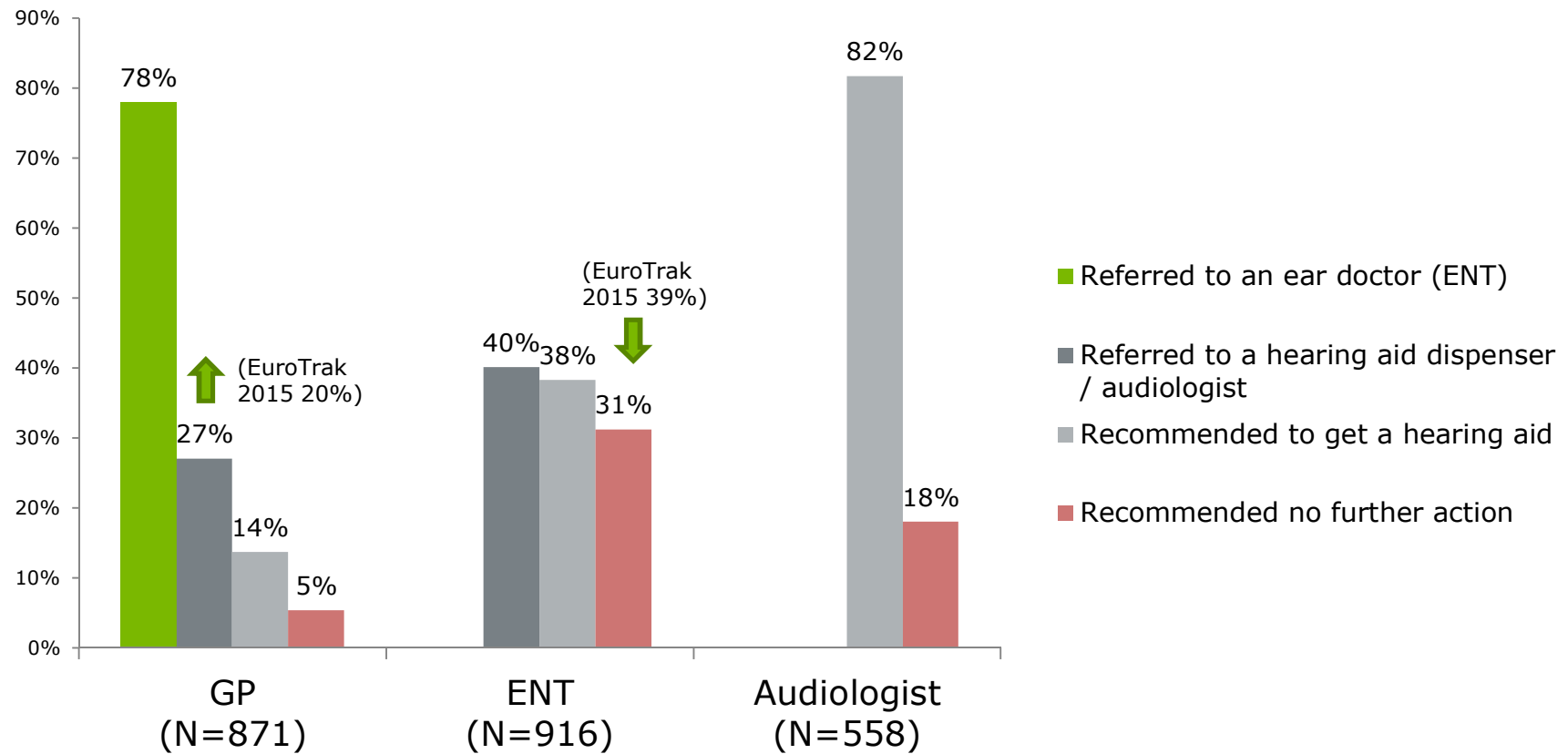
**HA owner (Base: 371)**



**Impaired non-owner (Base: 187)**



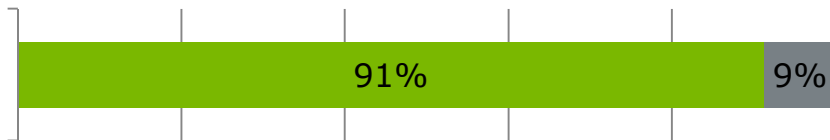
# Recommendations by profession



# Only few hearing impaired go to the audiologist BEFORE seeing a doctor about the hearing loss

*[IF SEEN FAMILY DOCTOR & AUDIOLOGIST]*

Did you discuss your hearing loss with the family doctor BEFORE visiting the Audiologist? (n=479)



■ Yes ■ No, I went to the audiologist first

*[IF SEEN THE AUDIOLOGIST FIRST]*

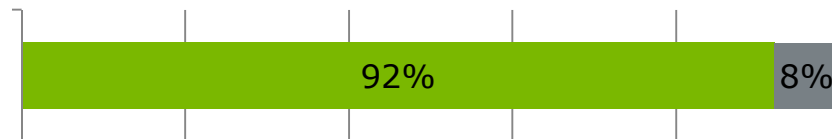
Did the Audiologist refer you to the family doctor? (n=38)



■ Yes ■ No, I decided by myself

*[IF SEEN ENT & AUDIOLOGIST]*

Did you discuss your hearing loss with the ear doctor (ENT) BEFORE visiting the Audiologist? (n=491)



■ Yes ■ No, I went to the audiologist first

*[IF SEEN THE AUDIOLOGIST FIRST]*

Did the Audiologist refer you to the ear doctor (ENT)? (n=36)



■ Yes ■ No, I decided by myself

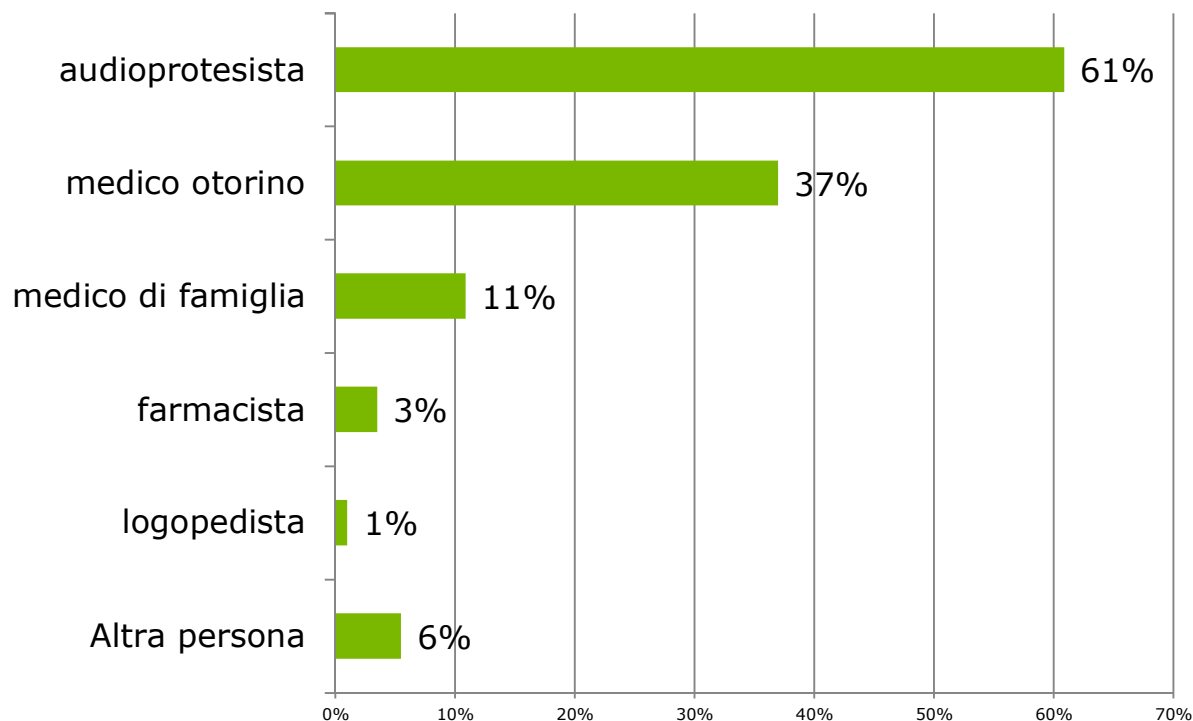
Italy specific questions



# More than half of the hearing aid owners were assisted by an “audioprotesista” when acquiring the HA

## When you purchased your hearing aid, who was looking after you?\*

(\*Quando ha acquistato il suo apparecchio acustico qual è la figura professionale che l'ha assistita?')



Italy specific question

HA-owner, n=509

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



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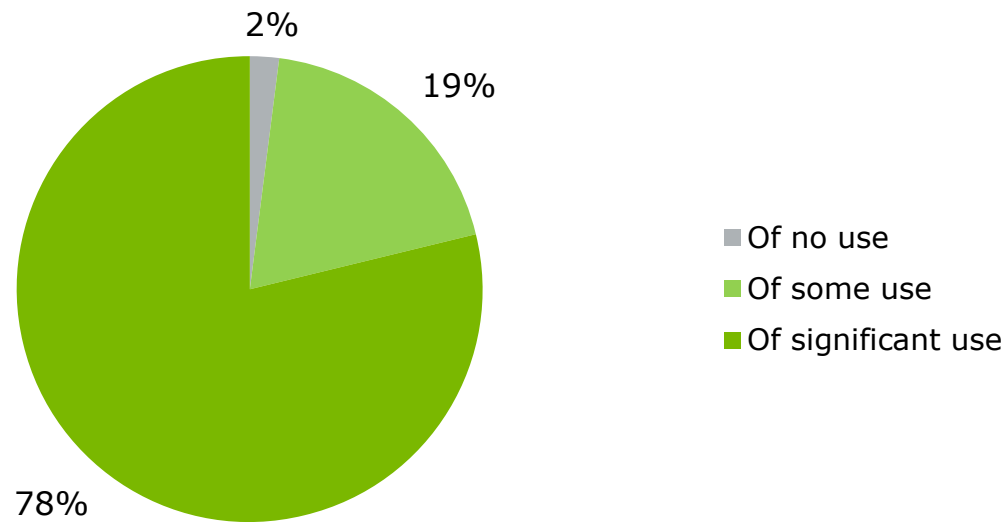
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities



**Work competitiveness:** 98% of the working hearing aid owners state their hearing aid(s) are useful on their job.

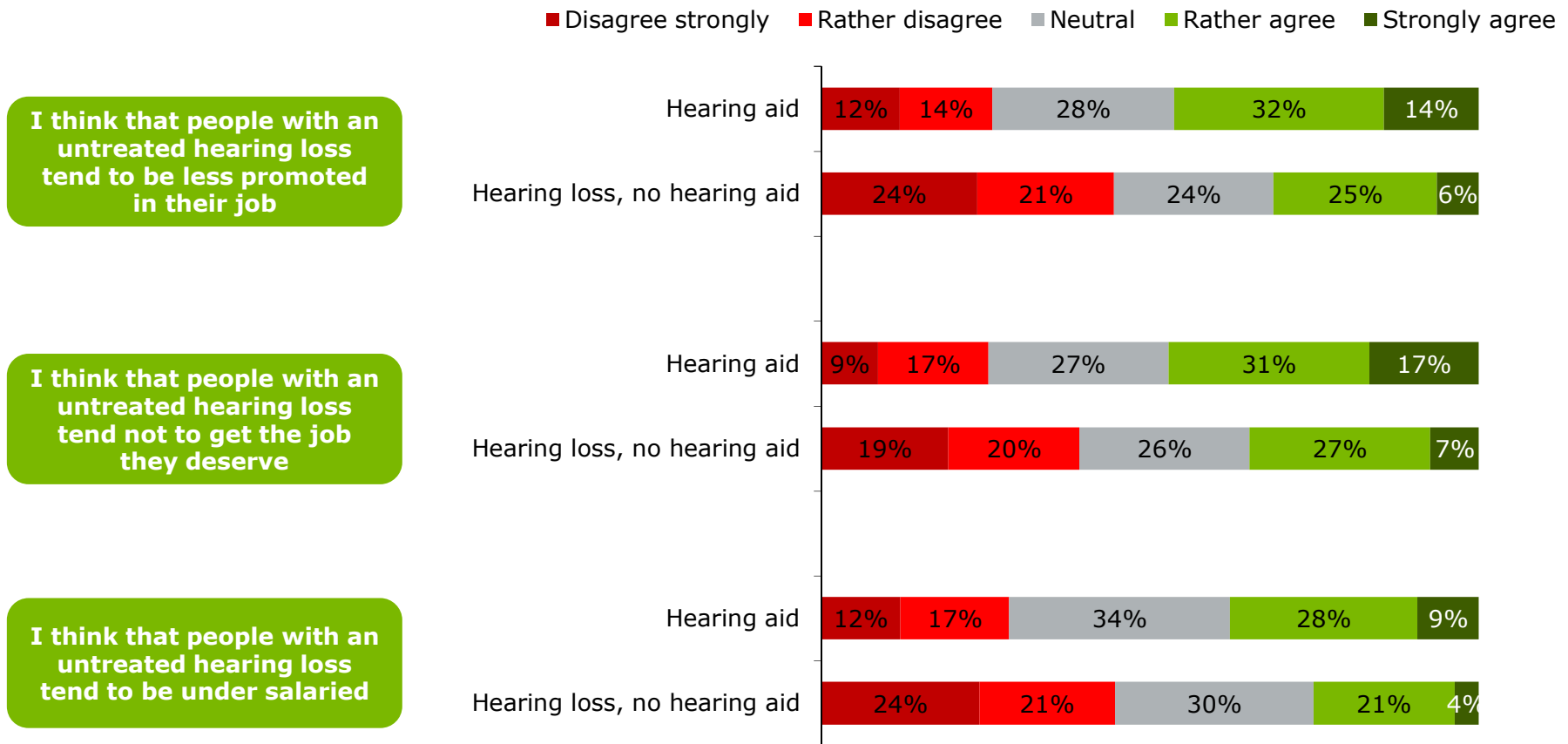
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**How useful are your hearing aids on your job?**



Base: N=303

**Work competitiveness:** People with hearing aids recognize that hearing aids increase the chance of hearing impaired to get promoted, to get the right job and to get more salary.



Base: Hearing loss, no hearing aid =750/ hearing aid n=489



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

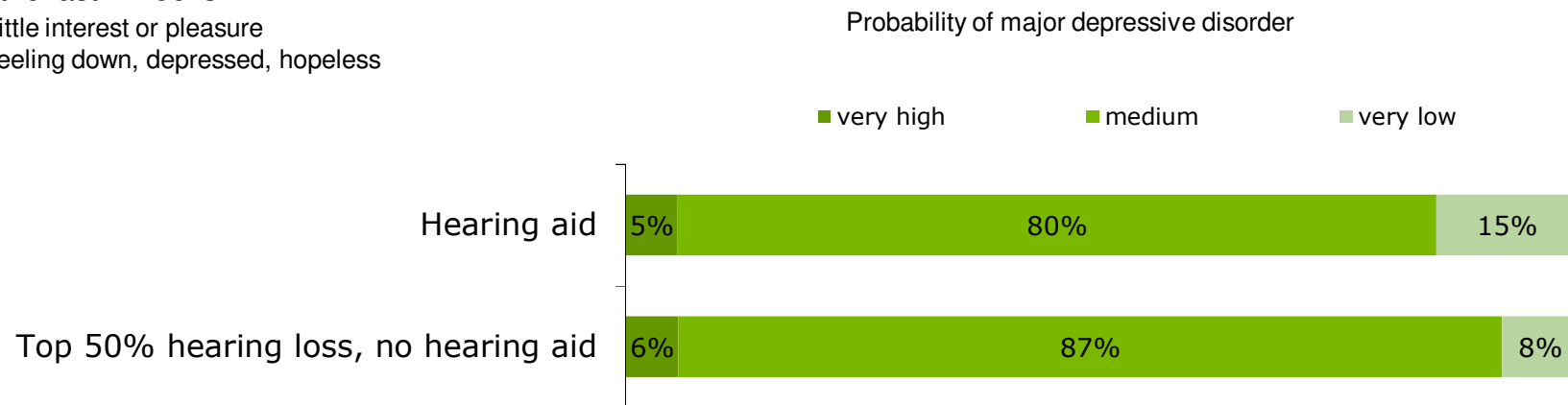
Depression symptoms:

PHQ-2 Screening:

In the last 2 weeks:

• Little interest or pleasure

• Feeling down, depressed, hopeless



Base: hearing aid n=316 / no hearing aid =135

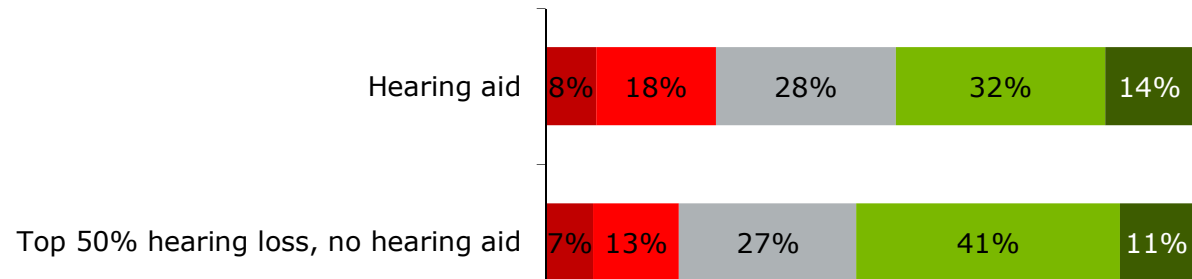
\*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- 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).

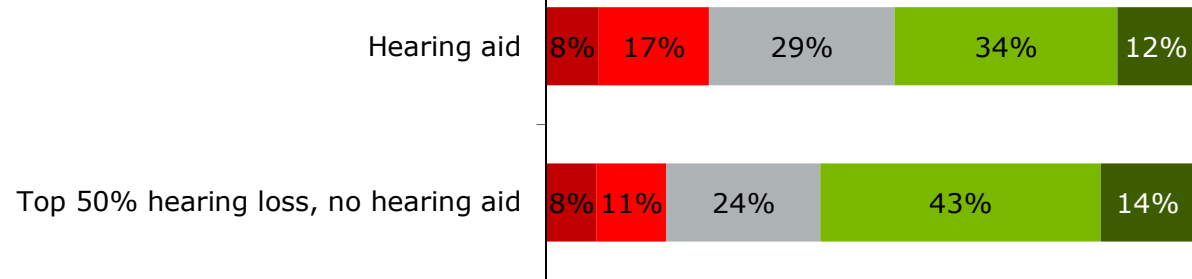
# General health problems: Compared to impaired hearing aid non-owners with significant hearing loss (Top 50% hearing loss\*), hearing aid owners feel less exhausted in the evenings

■ Disagree strongly ■ Rather disagree ■ Neutral ■ Rather agree ■ Strongly agree

In the evenings I often feel physically exhausted



In the evenings I often feel mentally exhausted



Base : Top 50% n=135 / hearing aid n=311

\*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:

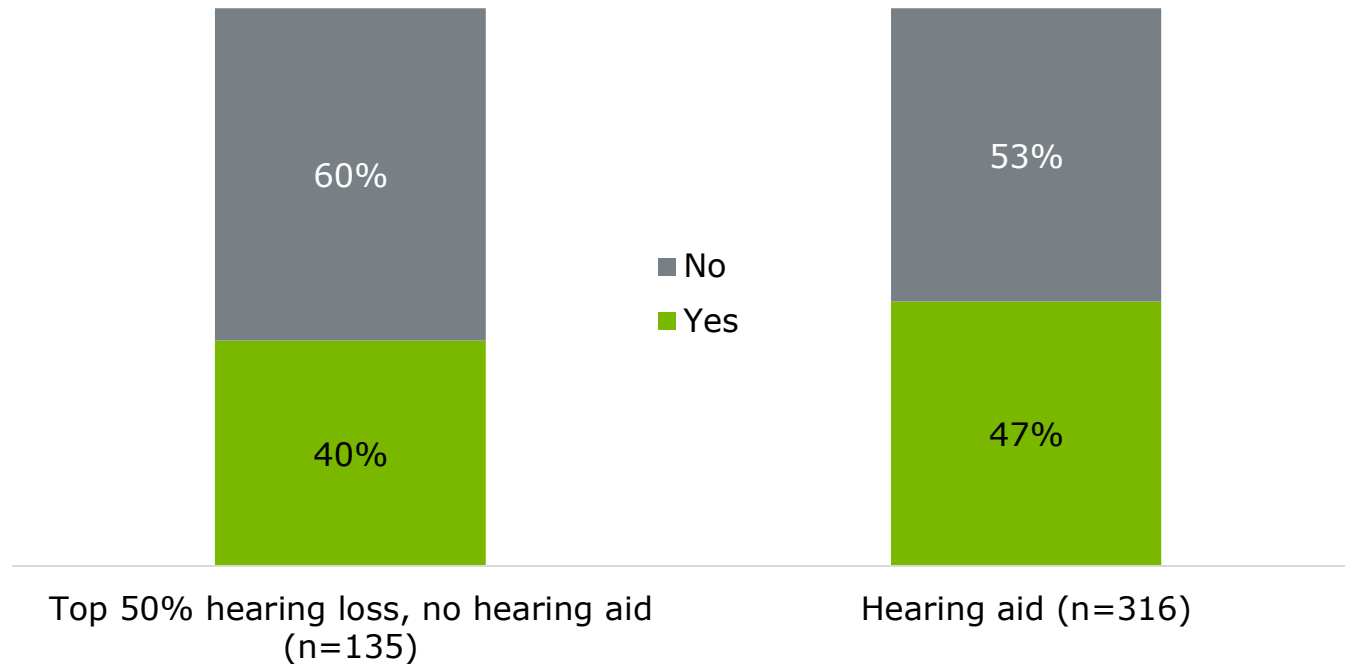
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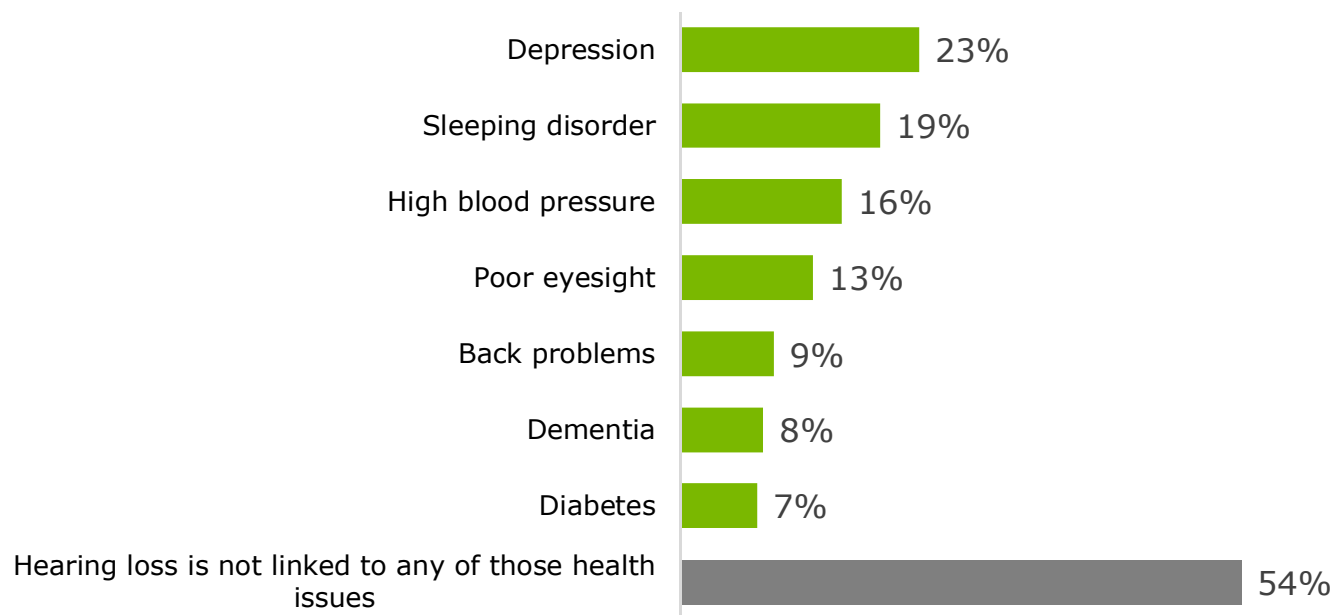
# General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids

Are you generally satisfied with the quality of your sleep?



23% of all hearing impaired think that hearing loss could be linked to depression.

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



Hearing impaired, N=1'332

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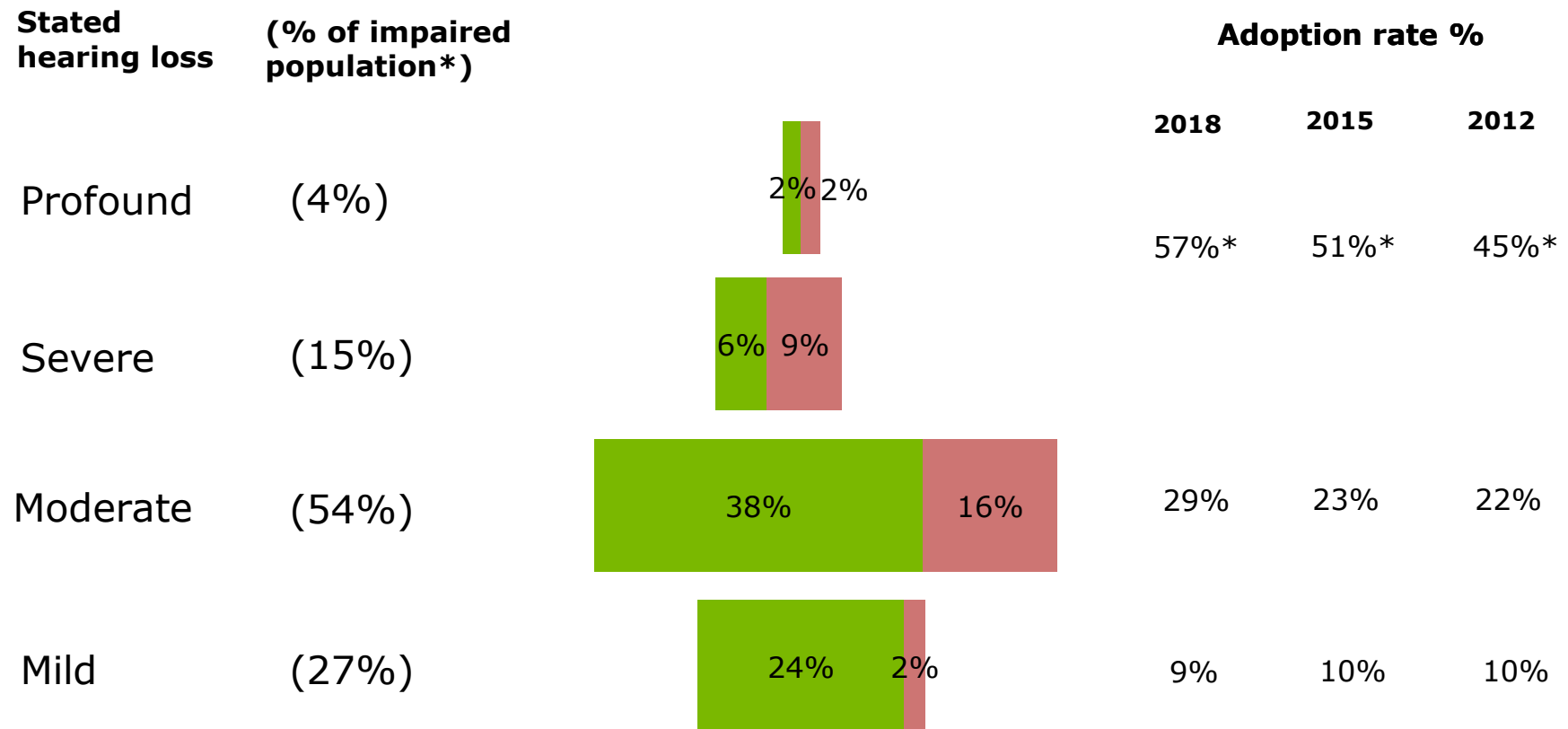
## 3. Analysis of hearing aid owners

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## 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



Base: n=1'289

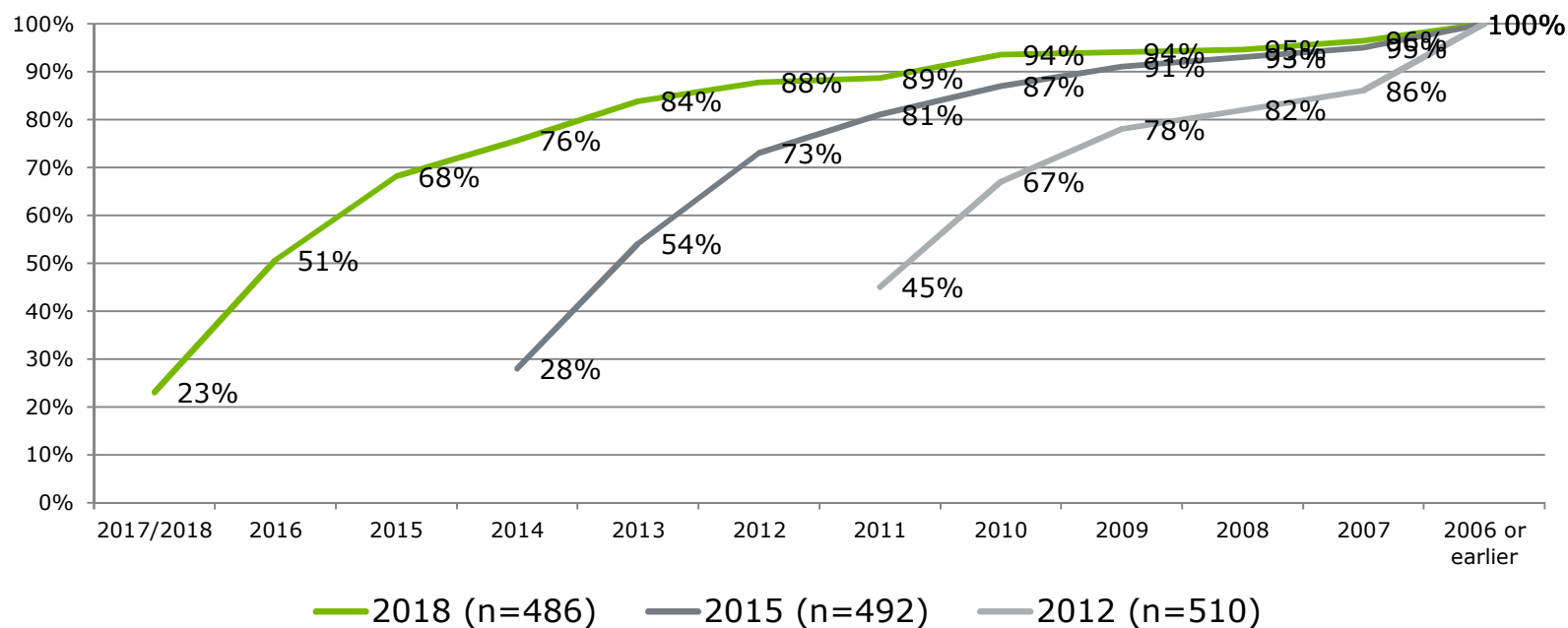
Sums can differ from 100% due to rounding

\* combined `severe\_` and `profound\_` because n is too small

■ No hearing aid  
■ Hearing aid

# 68% of the currently owned HAs were fitted in 2015 or later

**Year of purchase**

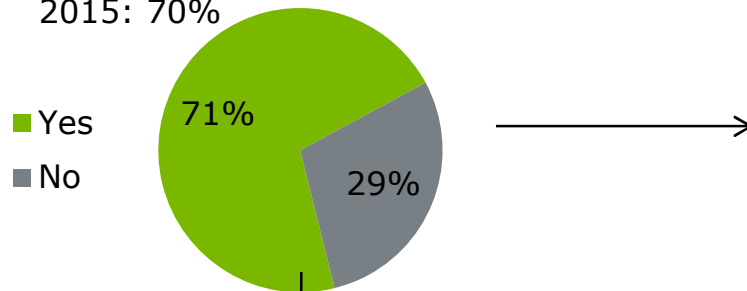


**Age of currently owned HAs (Mean):**  
**2018: 2.9 years**  
**2015: 2.5 years**  
**2012: 2.3 years**

On average 2-3 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 4 years before they are being replaced.

Current HAs = first HAs?

2015: 70%



HA-owner, n=509

How many years did you own your previous HAs?

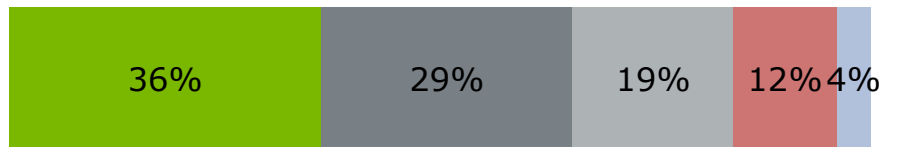


■ 1-3 years ■ 4-6 years ■ 7-10 years ■ 11 years or longer

Base: n=89

Age of HA before it has been replaced:  
 2018: 4 years (median)  
 2015: 4 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?

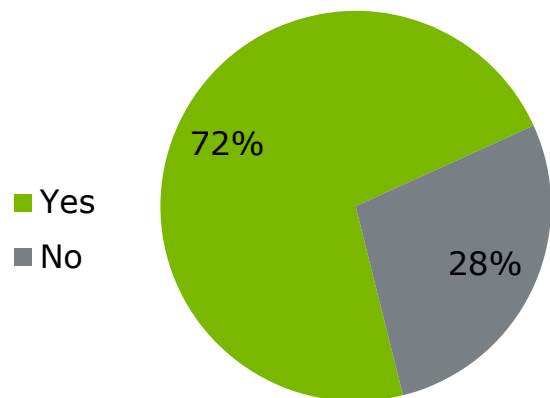


■ 1 year ■ 2 years ■ 3 years ■ 4-6 years ■ more than 6 years

Base: n=389

72% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on social life.

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

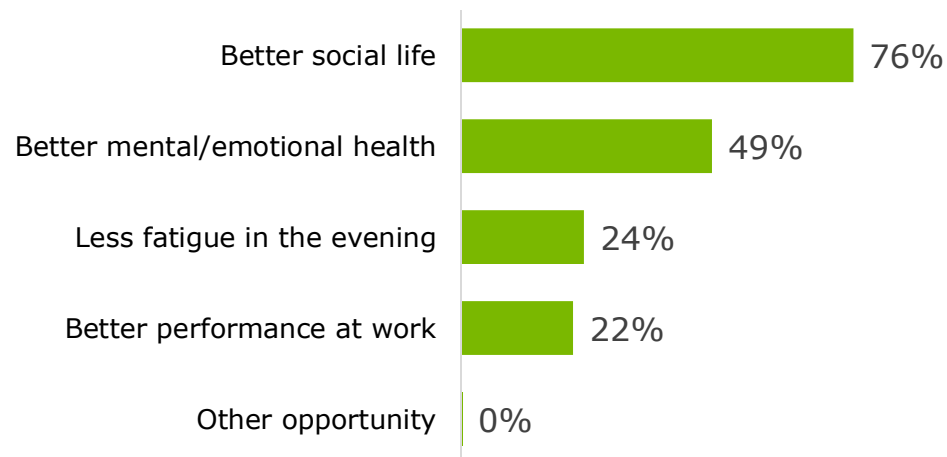


HA-owner, n=509

*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?

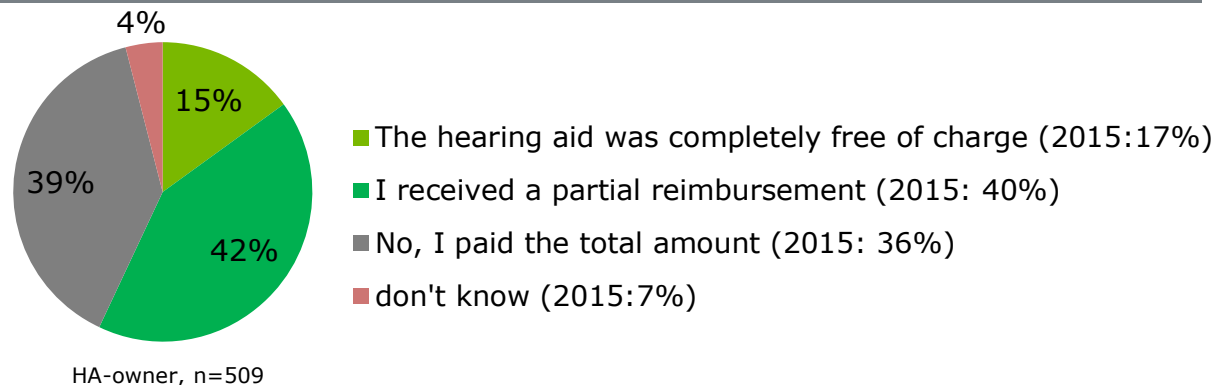
Please tick all that apply



Base: n=345

57% of the hearing aid owners received some kind of 3rd party reimbursement (same as in 2015). 55% of the non owners don't know whether a third party would pay any part of the hearing aids.

**Owners:** Did you receive any third part reimbursement?

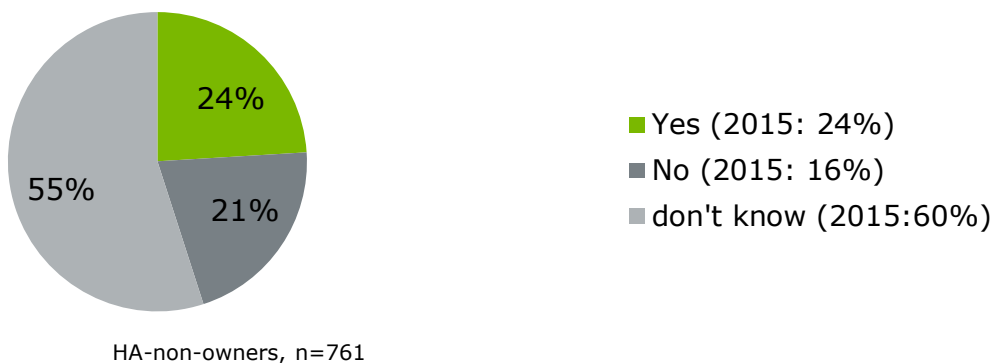


[IF REIMBURSEMENT RECEIVED]

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



**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, ...)



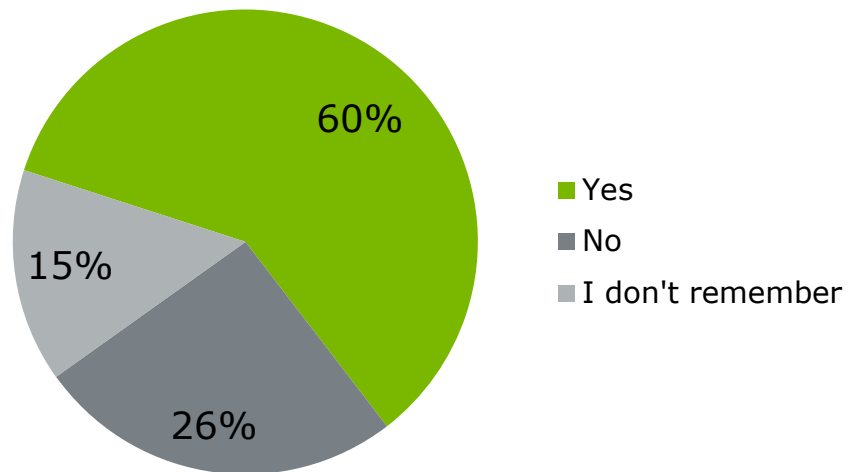
\*Italy specific question



# 60% of hearing aid owners had a free of charge trial before acquiring the hearing aid

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

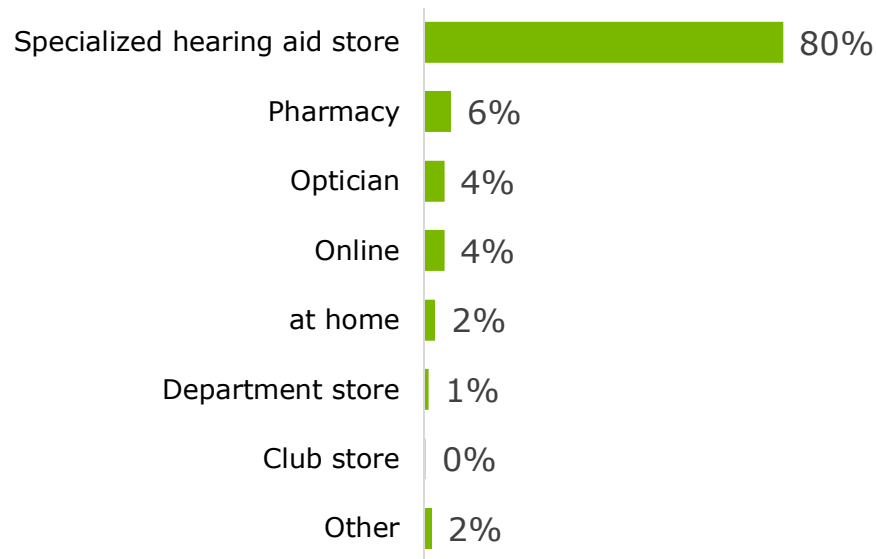


Base: N=509

# Specialized hearing aid store is by far the preferred place for obtaining hearing aids (both for owners and non owners).

## OWNERS:

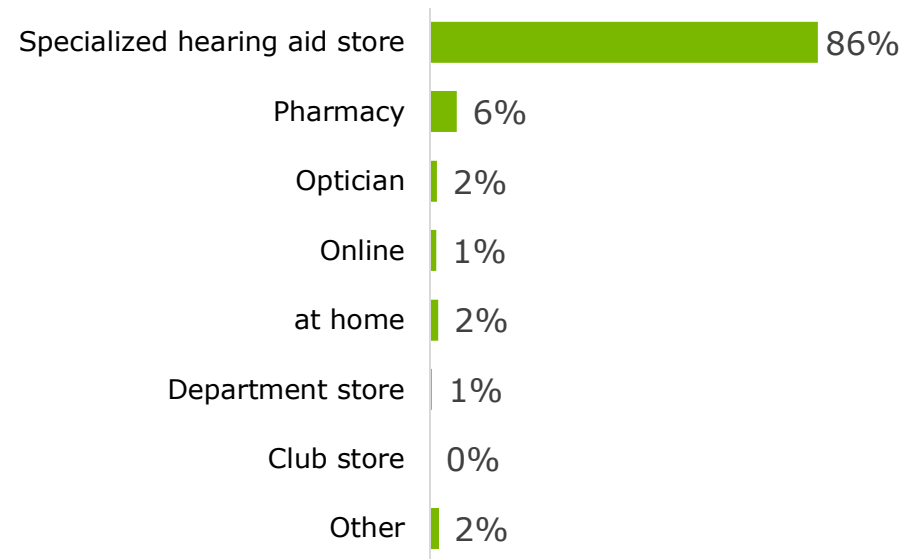
Where was your most current hearing aid obtained?



HA-owner, n=509

## NON OWNERS:

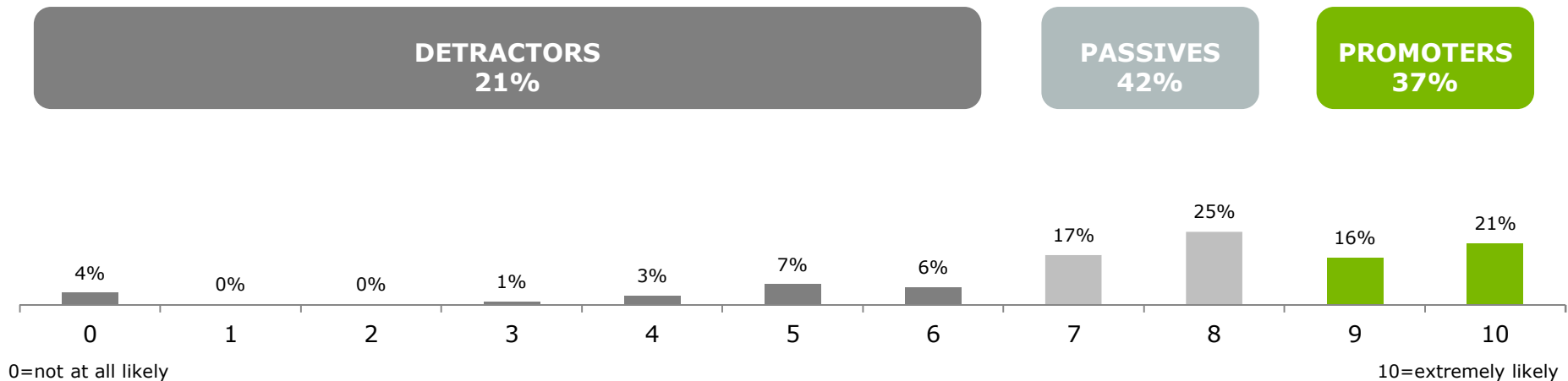
If you were to get hearing aids, where would you go?



HA-non-owner, n=823

Recommendation intention of the place where the hearing aid(s) have been obtained is okay, with a positive NPS score of 16.

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



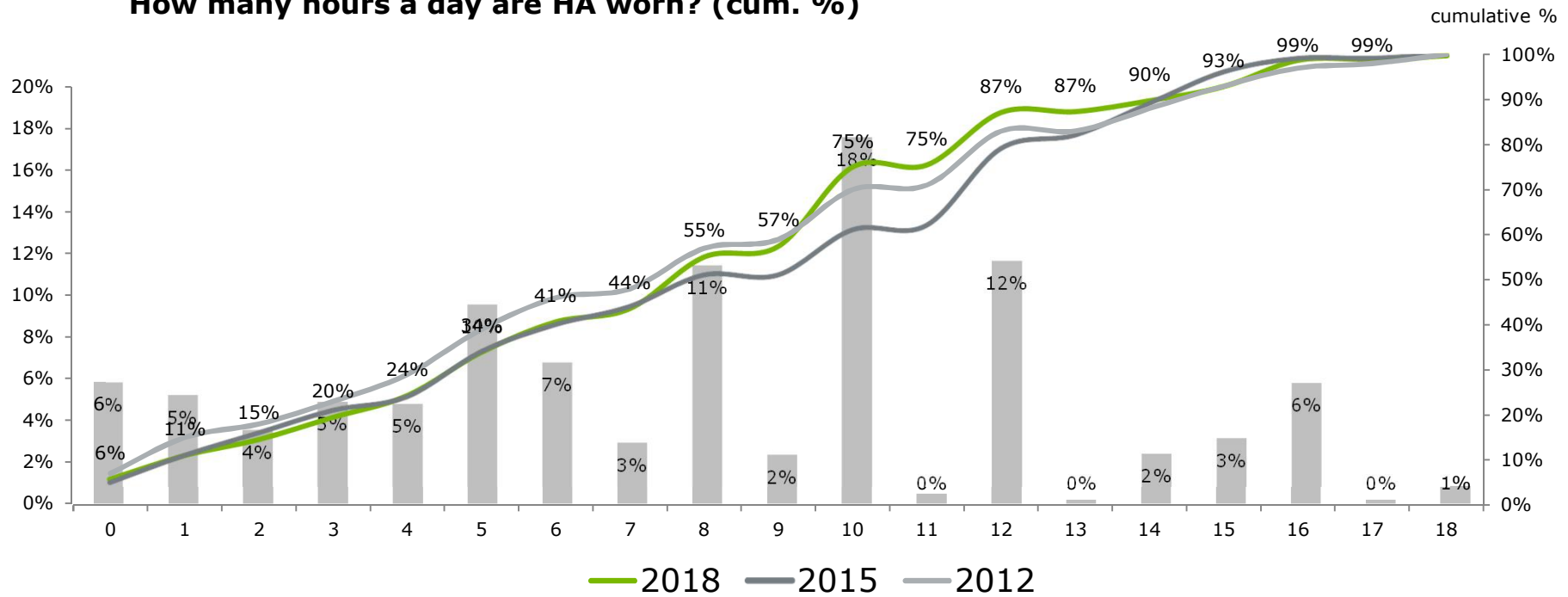
**NPS = PROMOTERS – DETRACTORS = 16**

HA-owner, n=509



# On average, HAs are worn 7.9 hours a day

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



HA-owner:  
 2018: n=509  
 2015: n=492  
 2012: n=501

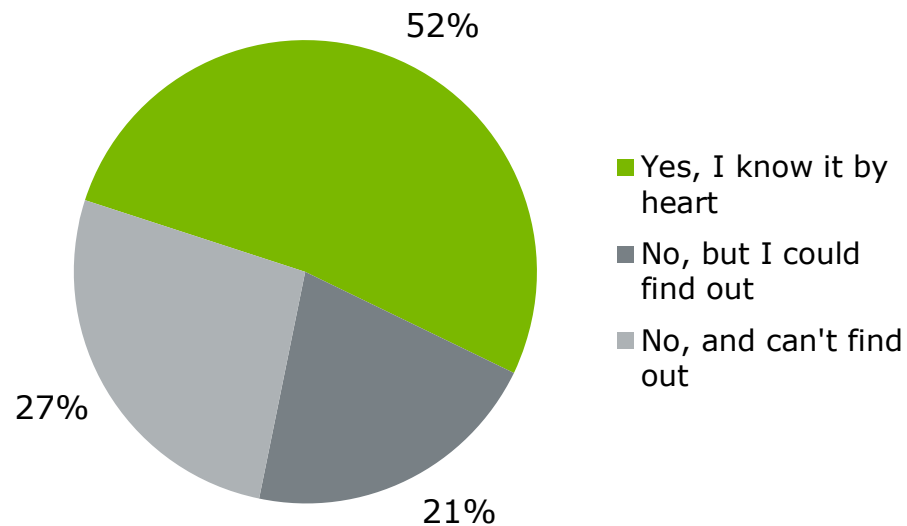
**HA worn:**  
 2018 Mean: 7.9 hours/day  
 2015 Mean: 8.4 hours/day  
 2012 Mean: 7.7 hours/day



# 52% of today's hearing aid owners are aware of their hearing aid brand.

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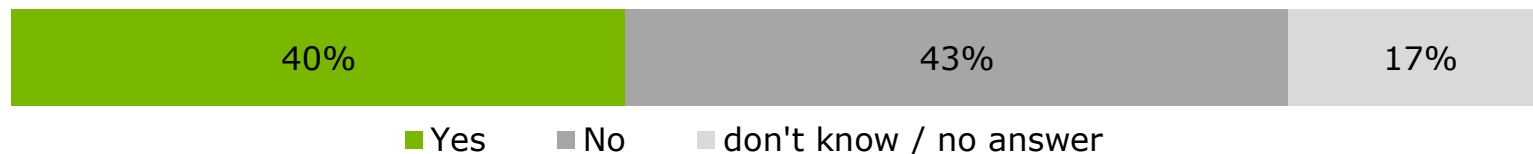
Are you aware of the brand of your hearing aid(s)?



Base: N=509

20% of the HA owners use an accessory for their hearing aids.  
66% 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=509)

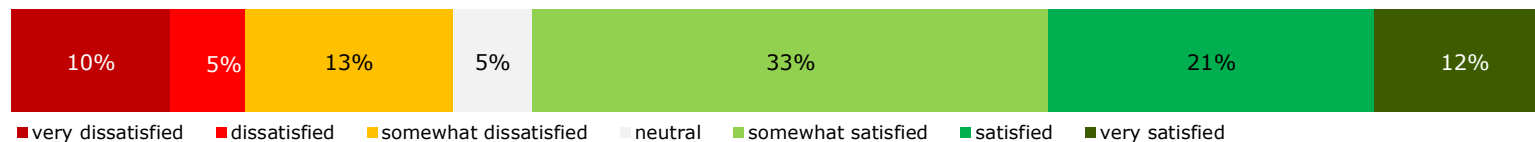


Do you personally use accessories for your hearing aids (TV-Streamer/ Apps / Remote Control / etc.) ? (HA owners, n= 509)



*IF ACCESSORIES USED (n=154):*

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

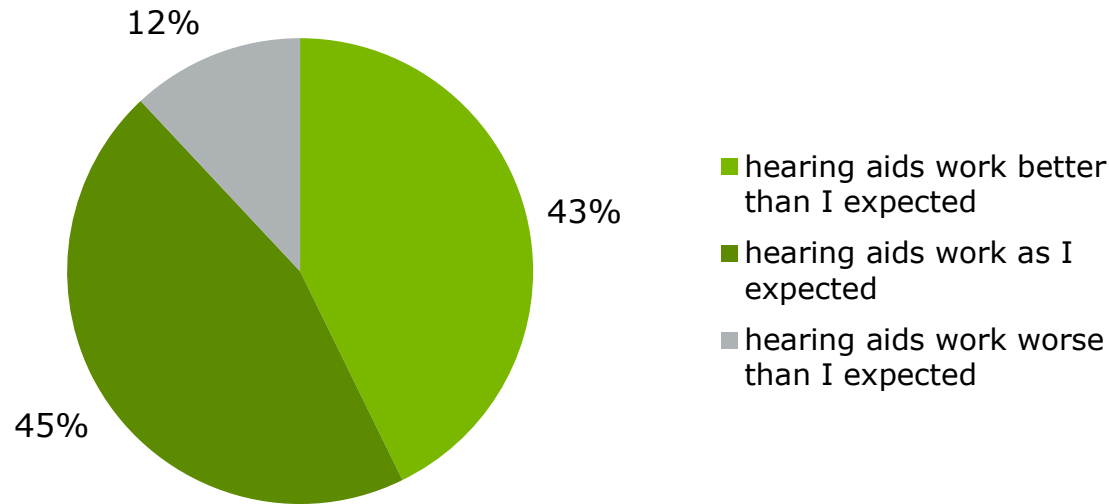


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# Satisfaction with hearing aids and drivers

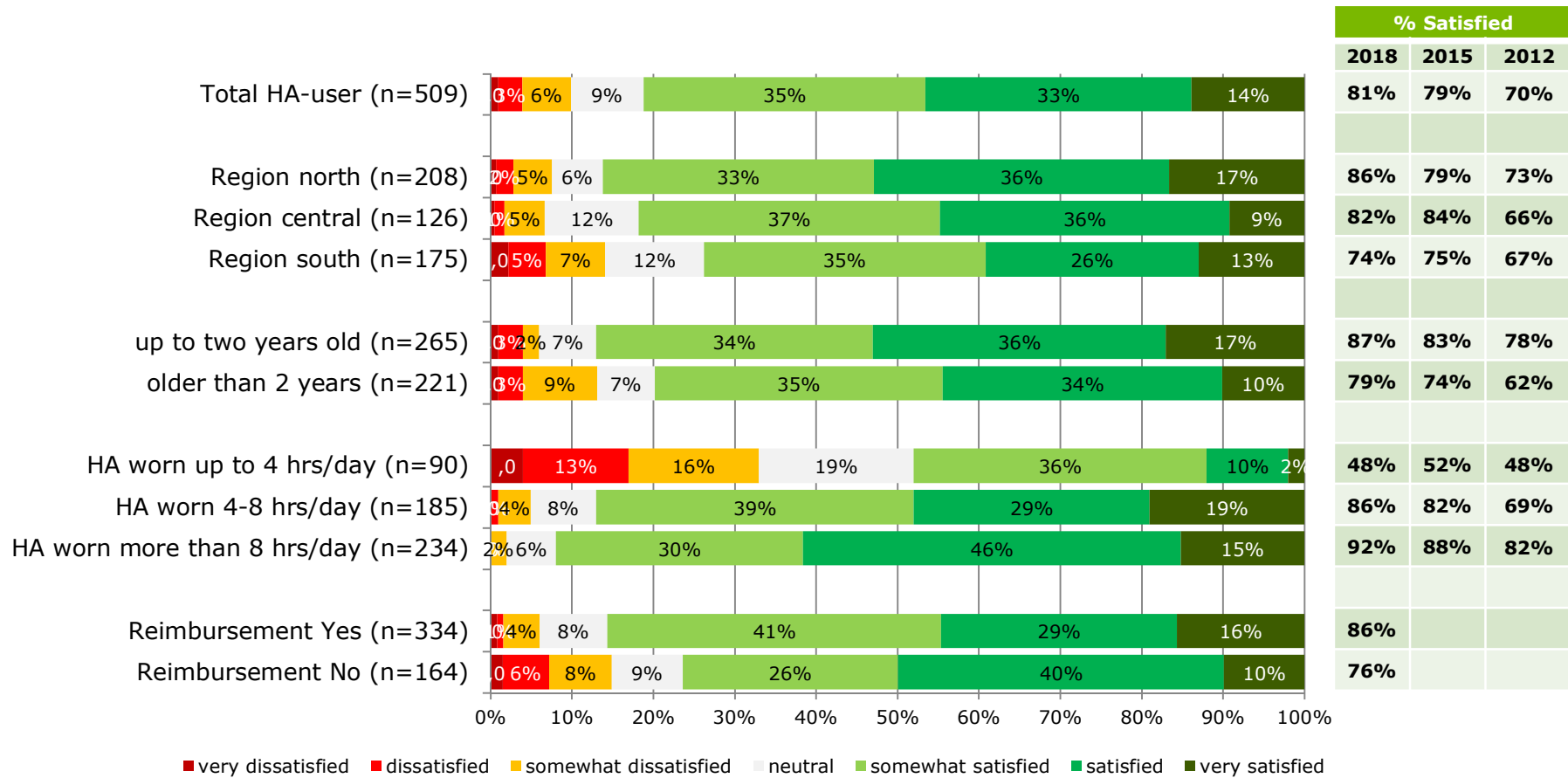
# 88% of the hearing aid owners say their hearing aid works better than or as expected

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



Base: N=509

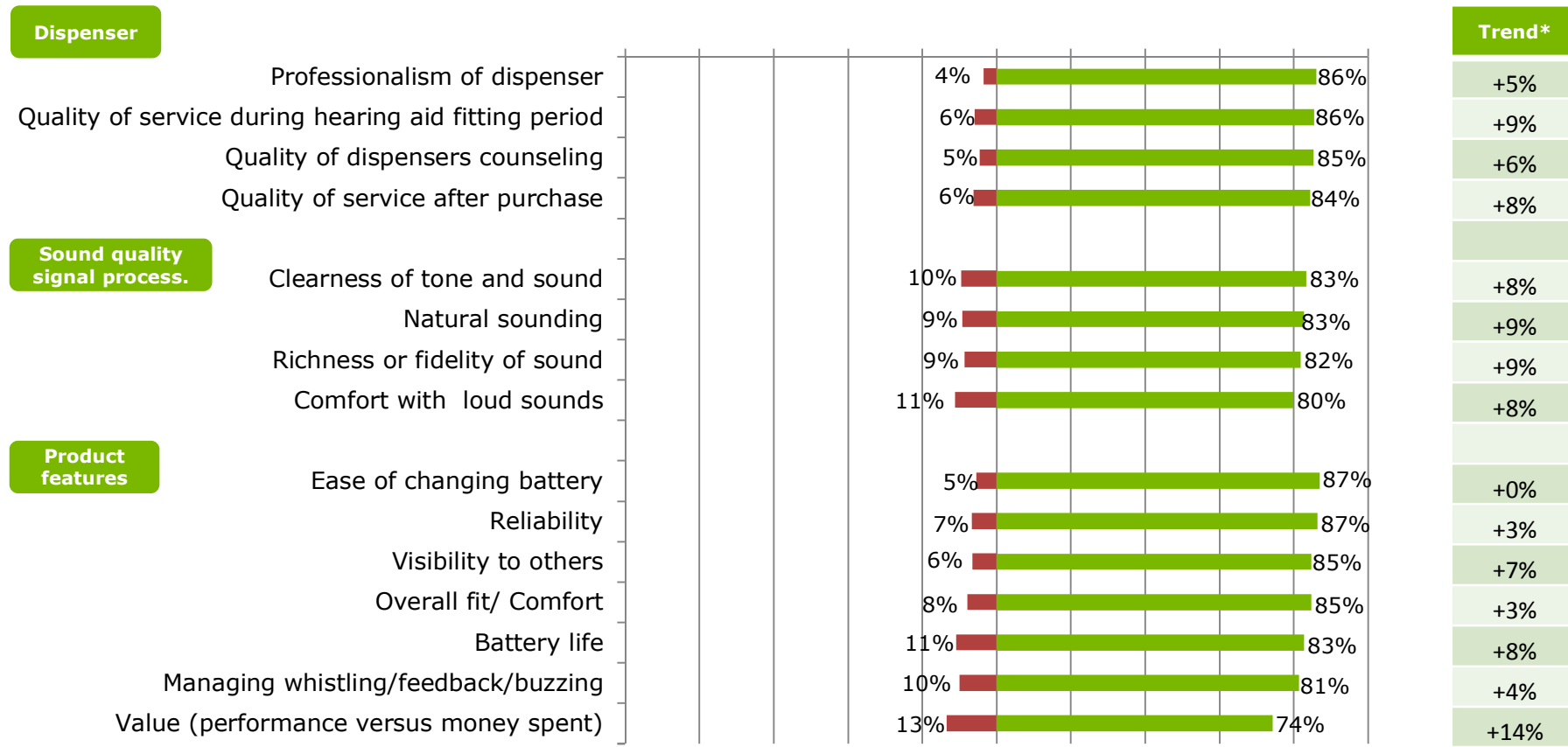
# Overall satisfaction with HA stays on a high level with 81% of the users being satisfied



# Overall Satisfaction with HA: Country comparison

	UK	Bel- gium	Nerther- lands	Poland	France	Switzer- land	Den- mark	Norway	<b>Italy</b>	Japan
Overall satisfaction 2012	72%	-	-	-	80%	84%	70%	72%	<b>70%</b>	36%
Overall satisfaction 2015/16/17	70%	80%	73%	80%	84%	81%	71%	-	<b>79%</b>	39%
Overall satisfaction 2018	74%				82%				<b>81%</b>	

# Satisfaction with current hearing aids I



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

\* % of satisfied HA owners compared to EuroTrak 2015

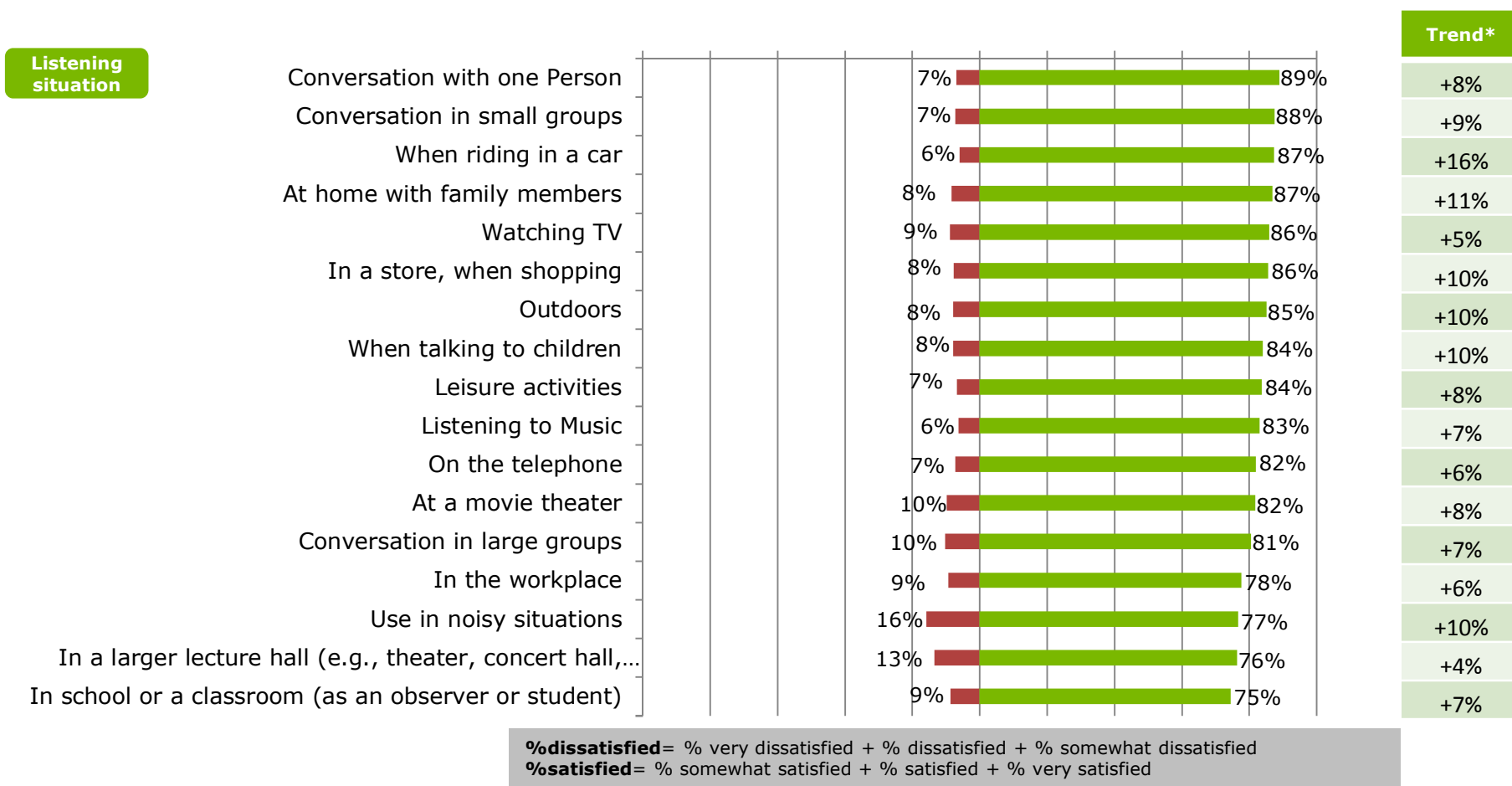
■ dissatisfied ■ satisfied

HA-owner, n=509





# Satisfaction with current hearing aids II



\* % of satisfied HA owners compared to EuroTrak 2015

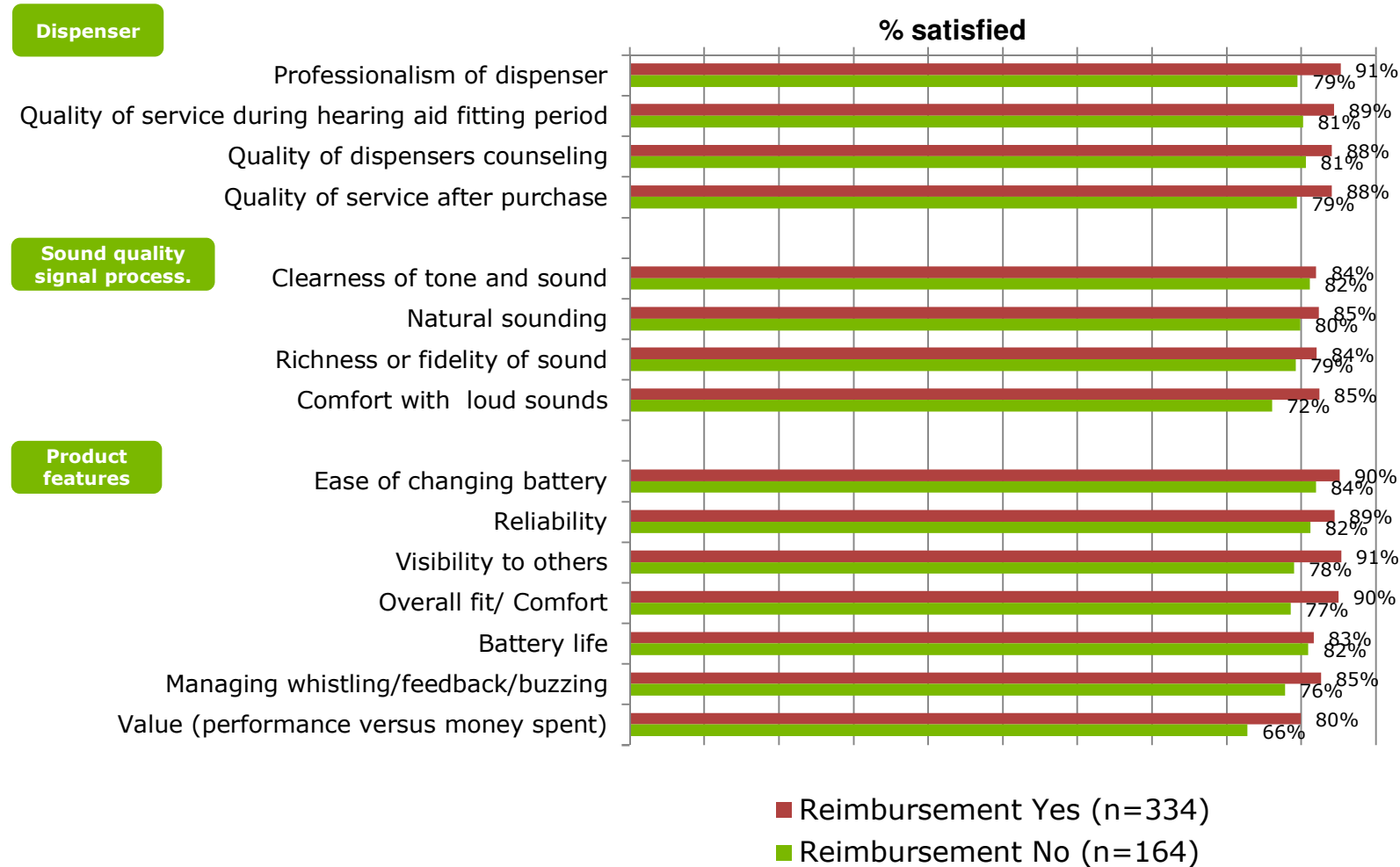
■ dissatisfied ■ satisfied

HA-owner, n=509



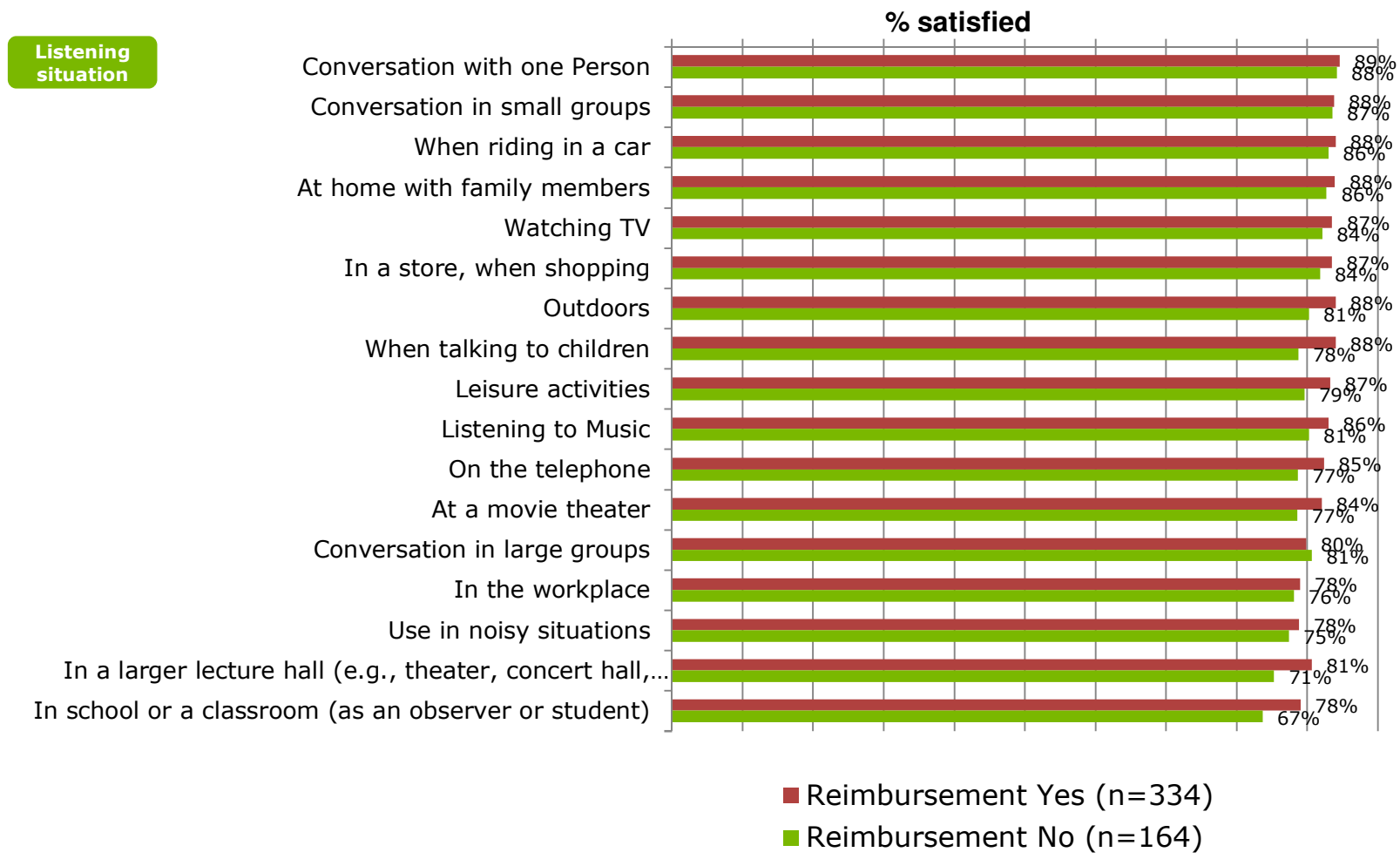
# Satisfaction with current hearing aids I

## Reimbursement vs. No Reimbursement

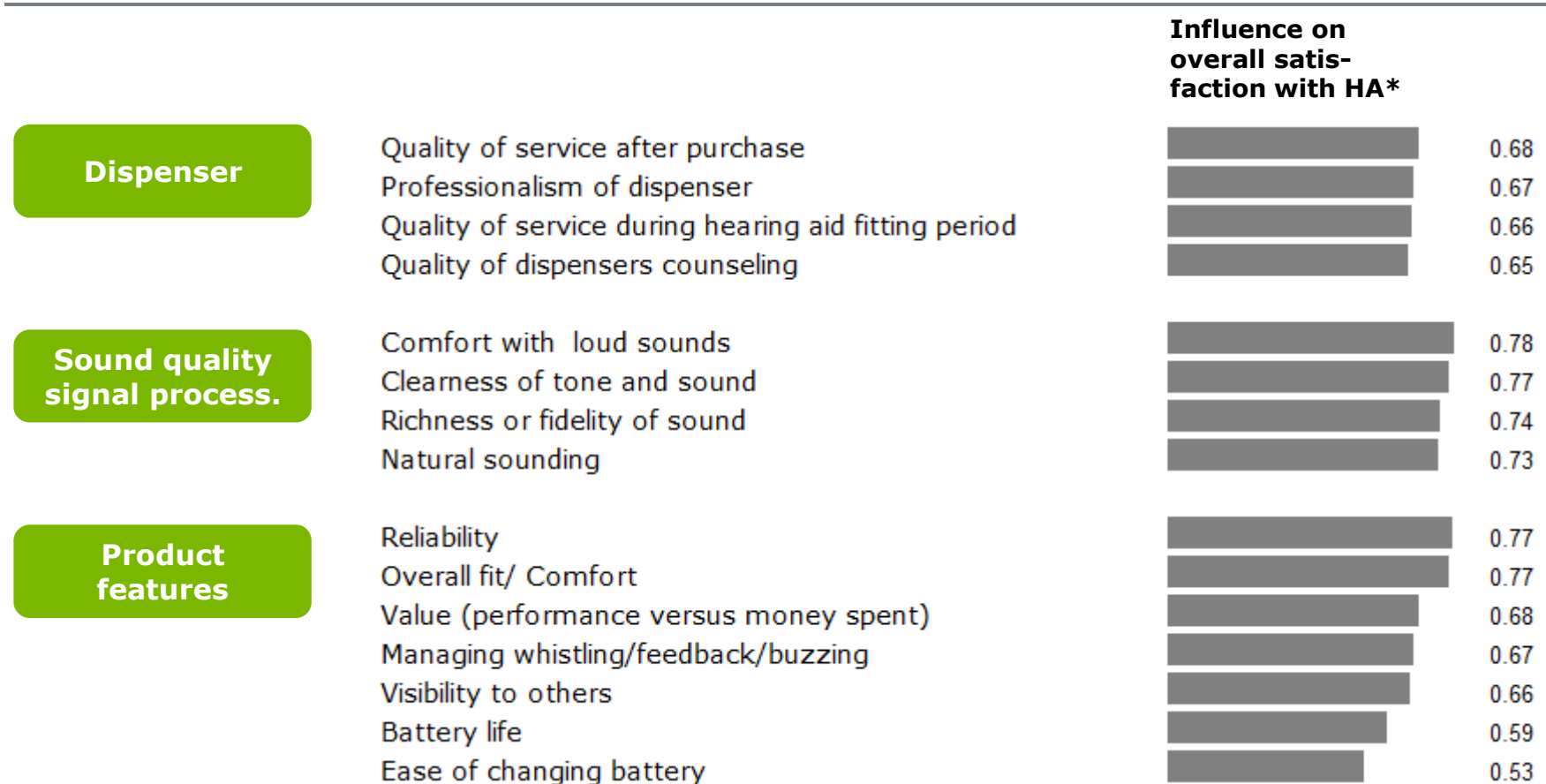


# Satisfaction with current hearing aids II

## Reimbursement vs. No Reimbursement



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

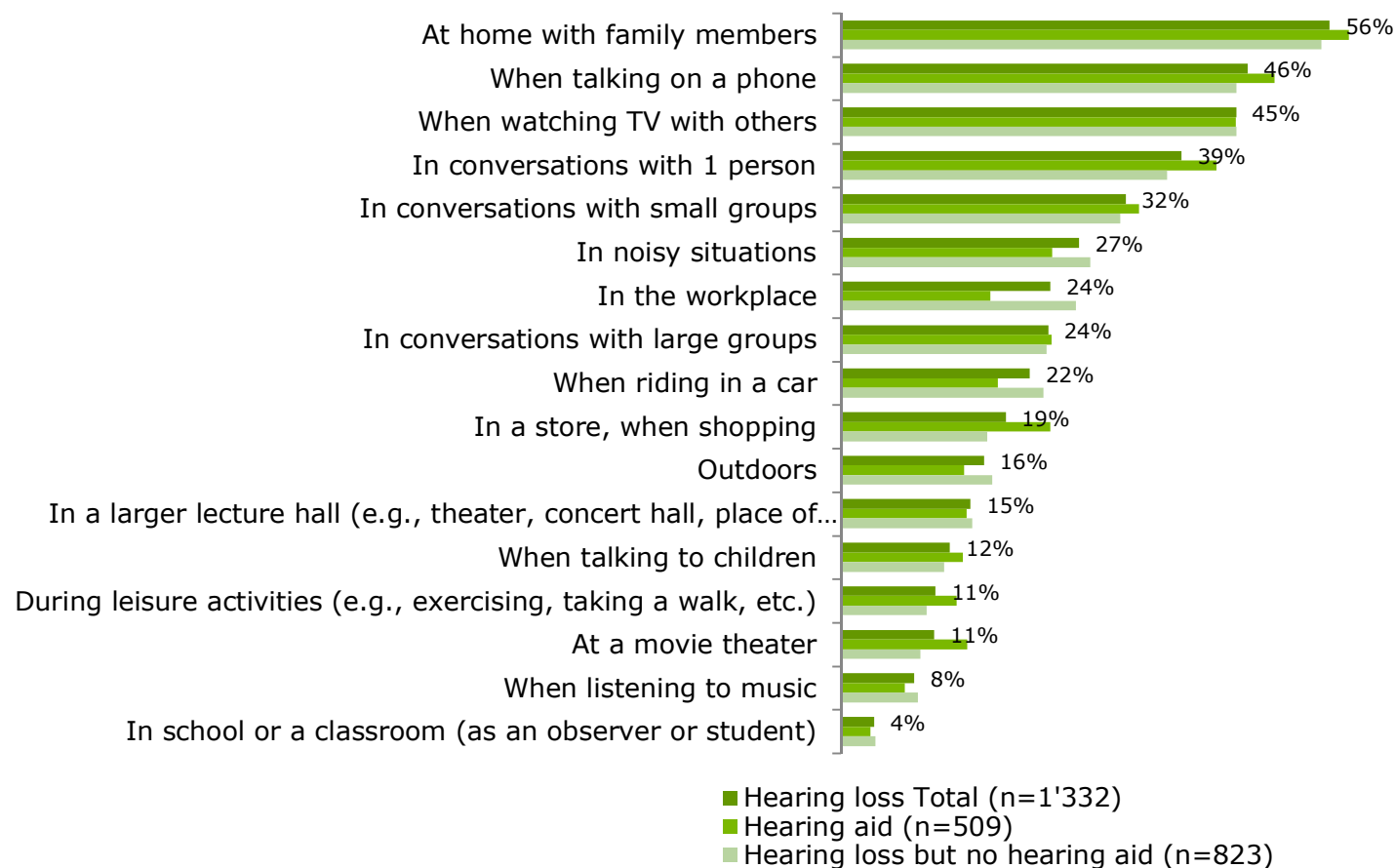


\*The Influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction ; 1 means a maximal relationship. **Read:** Comfort with loud sounds is the most important criterion for satisfaction.



# Important listening situations

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

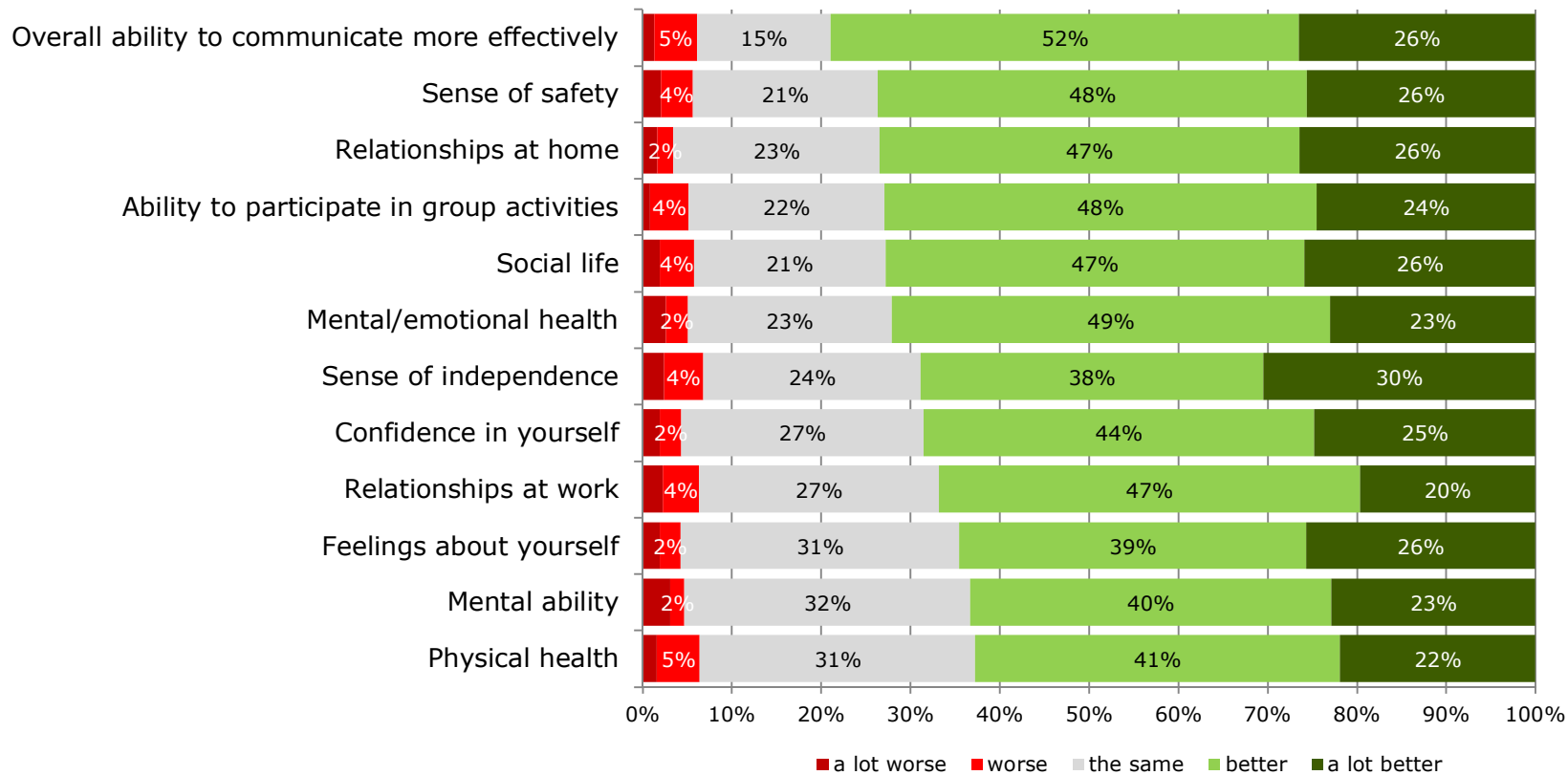


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# Positive impact of hearing aids, quality of life

Significant positive impact of HAs on different aspects: Especially communication effectiveness, sense of safety, relationships at home, participating in group activities and social life improve with hearing aids.

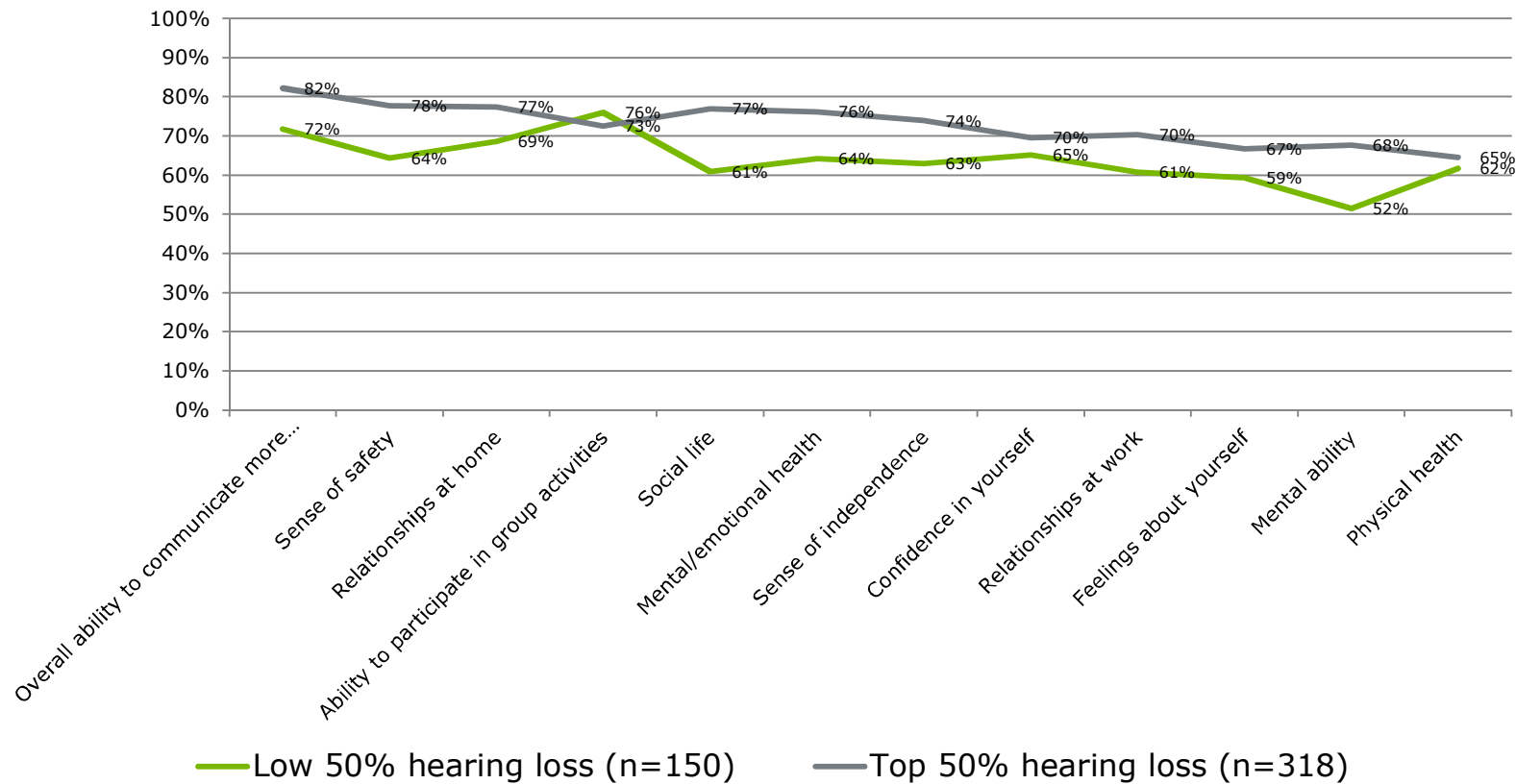
Since you started using your hearing aid(s), please rate the changes you have experienced in each of the following areas, that you believe are due to your hearing aid(s).



HA-owner, n=509

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

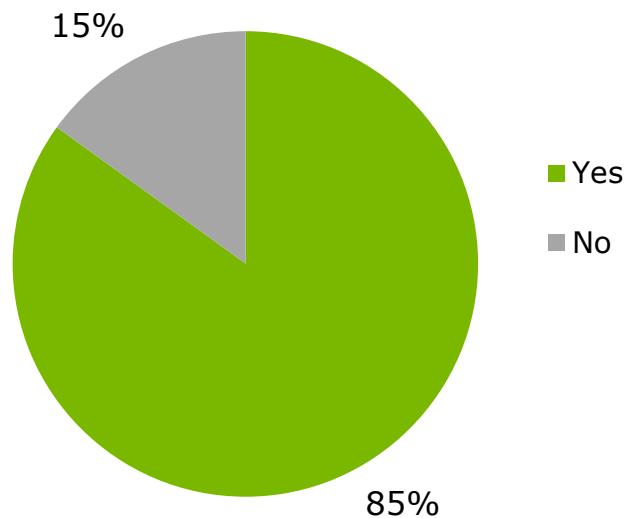
**% of HA owners feeling better/a lot better**



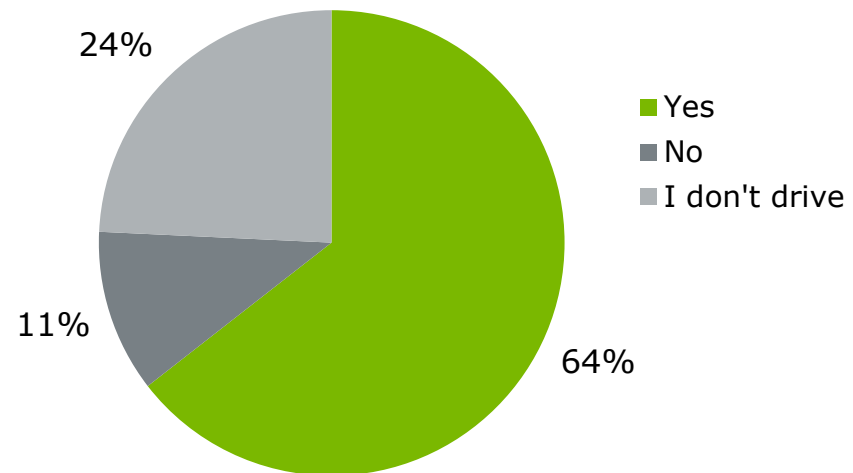


# Most hearing aid owners feel more confident moving in a city and driving their car since wearing hearing aids!

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



Since wearing a hearing aid, do you feel more confident driving your car?\*



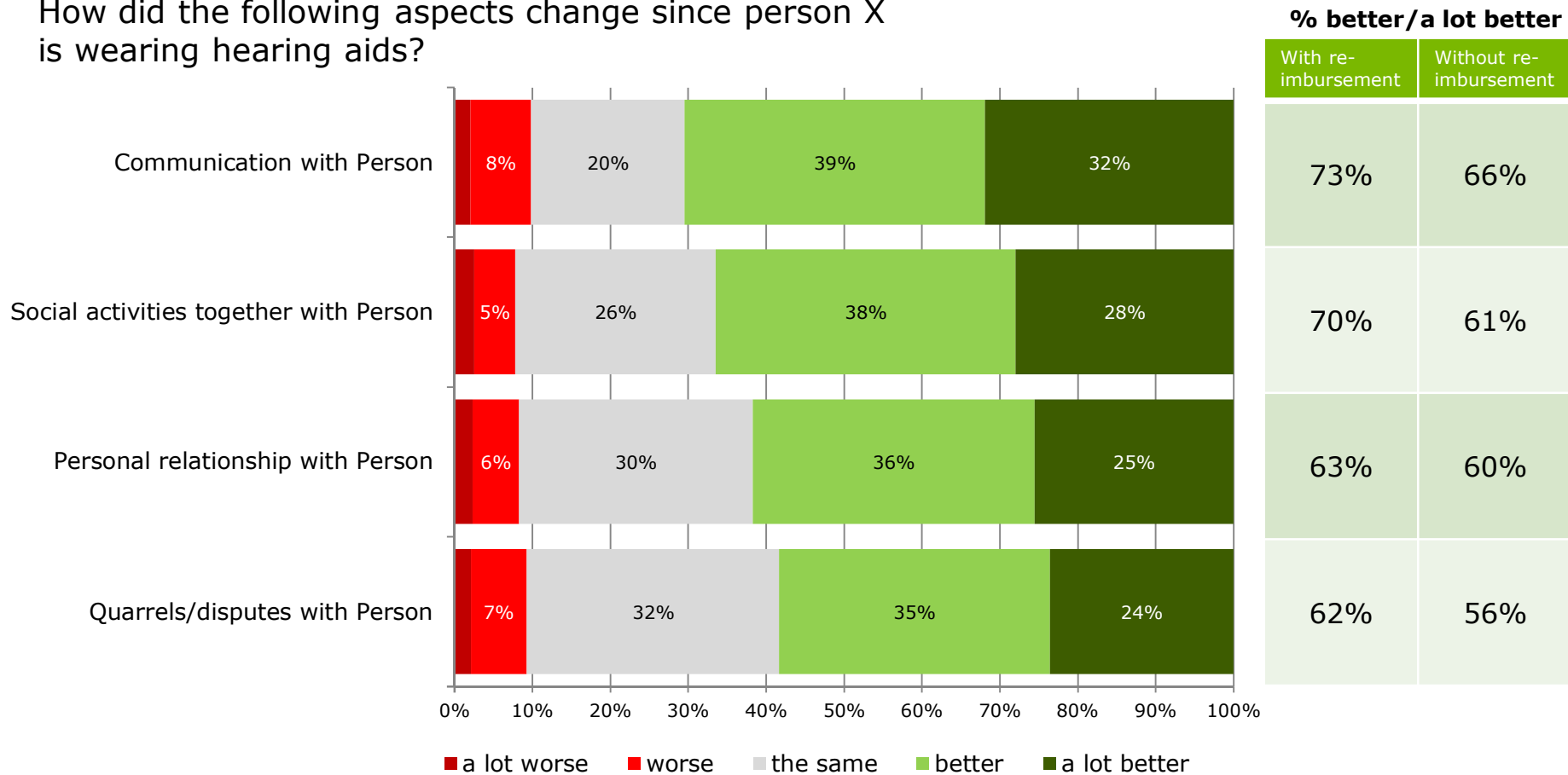
\*Italy specific question

Base: N=509



# 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?

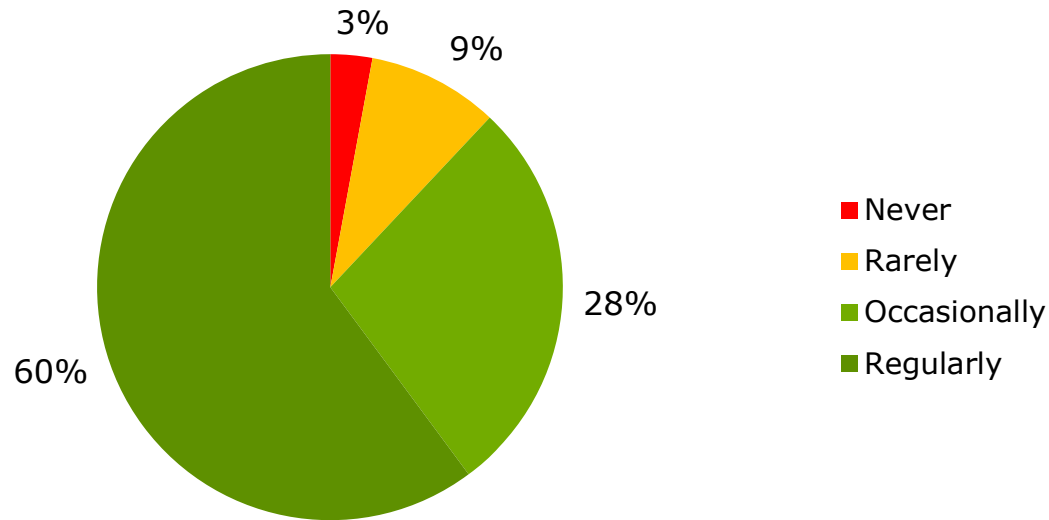


Someone in HH / parent has HA, n=407



# 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?



Base: N=509

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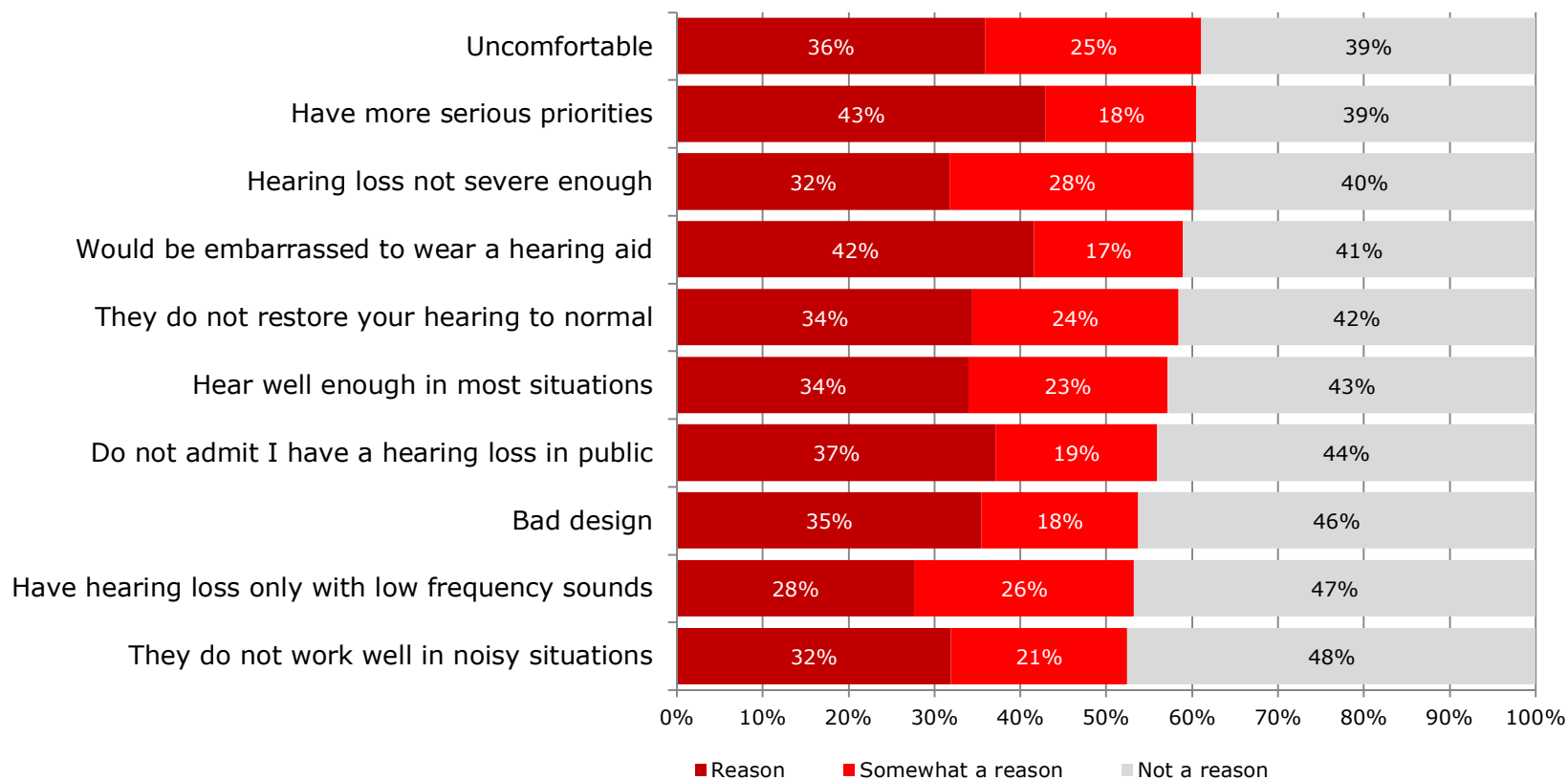
## **4. Analysis of hearing impaired non-owners**

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

	HA Owner 2018: n=509	HA-Non-owner Low 50% HL n=434	Non-owner Top 50% HL n=238
<b>Ears impaired</b>			
Unilateral loss	35%	46%	32%
Bilateral loss	65%	54%	68%
<b>Perceived loss</b>		More similar hearing loss- structure	
Mild	8%	45%	8%
Moderate	54%	51%	69%
Severe	30%	3%	16%
Profound	8%	0%	7%

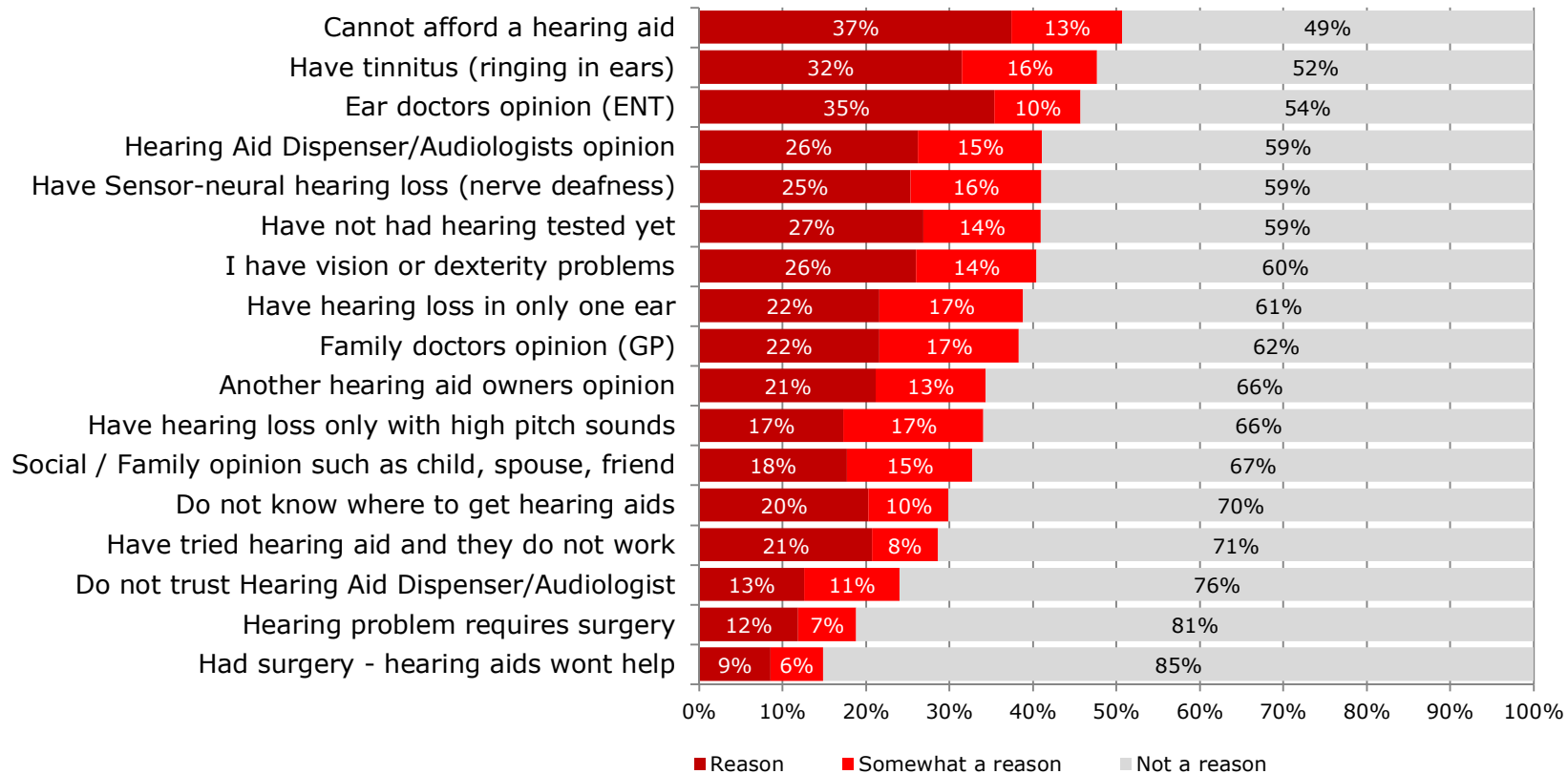
# Top 10 reasons for not having a hearing aid (I/II)



Base: non owners Top 50% HL: n=238



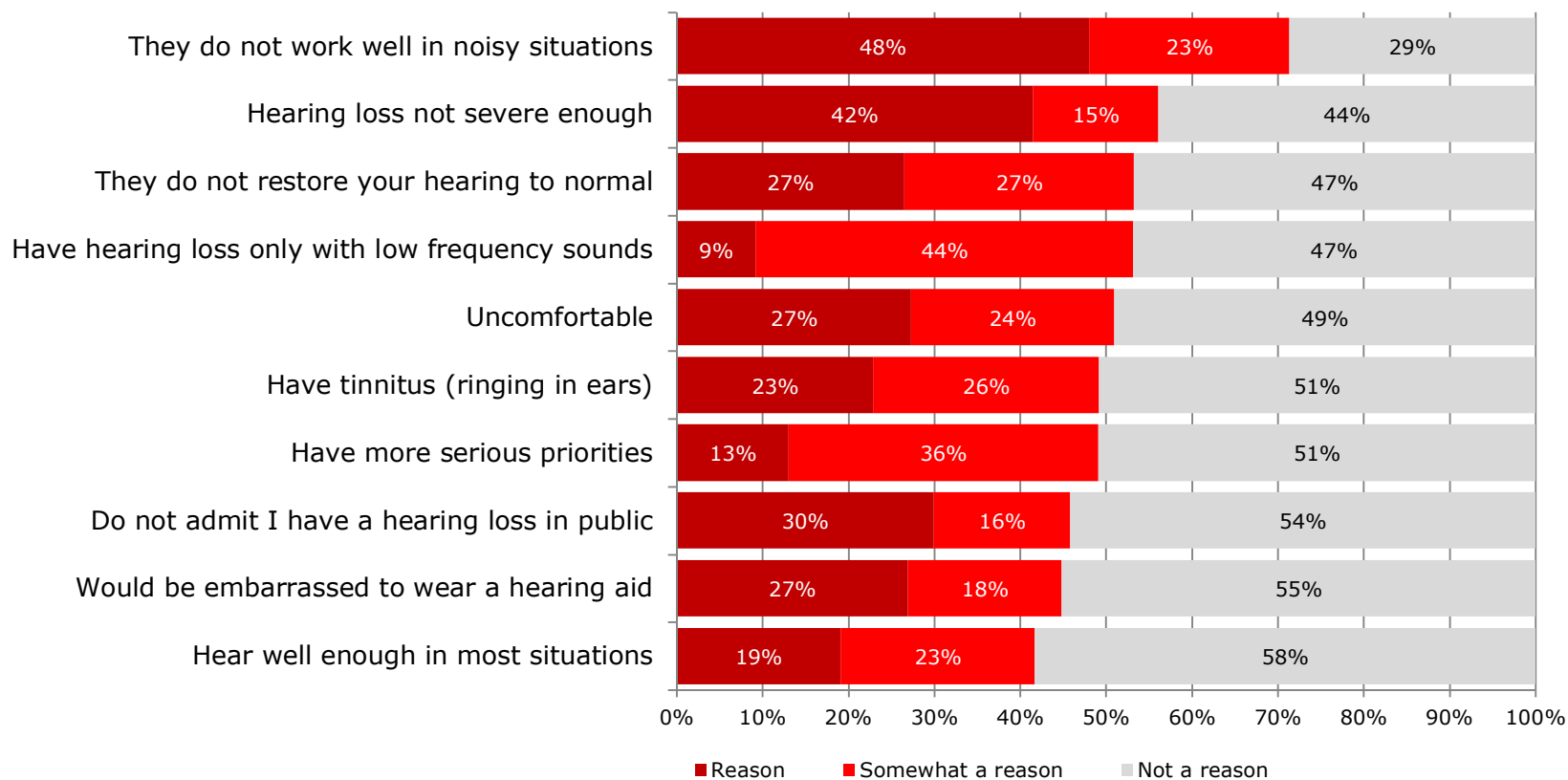
# Less important reasons for not having a hearing aid (II/II)



Base: non owners Top 50% HL: n=238



# Top 10 reasons for HA owners NOT using them



Owners who don't use, n=22 (low sample!)

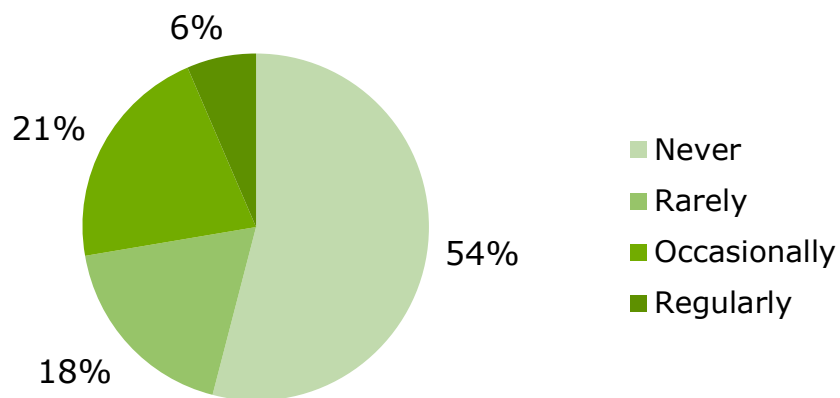


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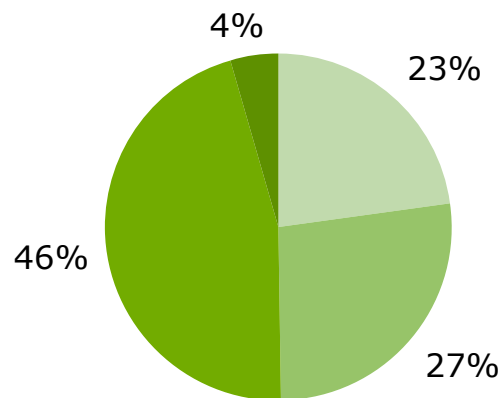
# Social rejection because of hearing loss compared to the acceptance of hearing aids

54% 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=509

Base: Top 50% hearing loss, no hearing aid N=238

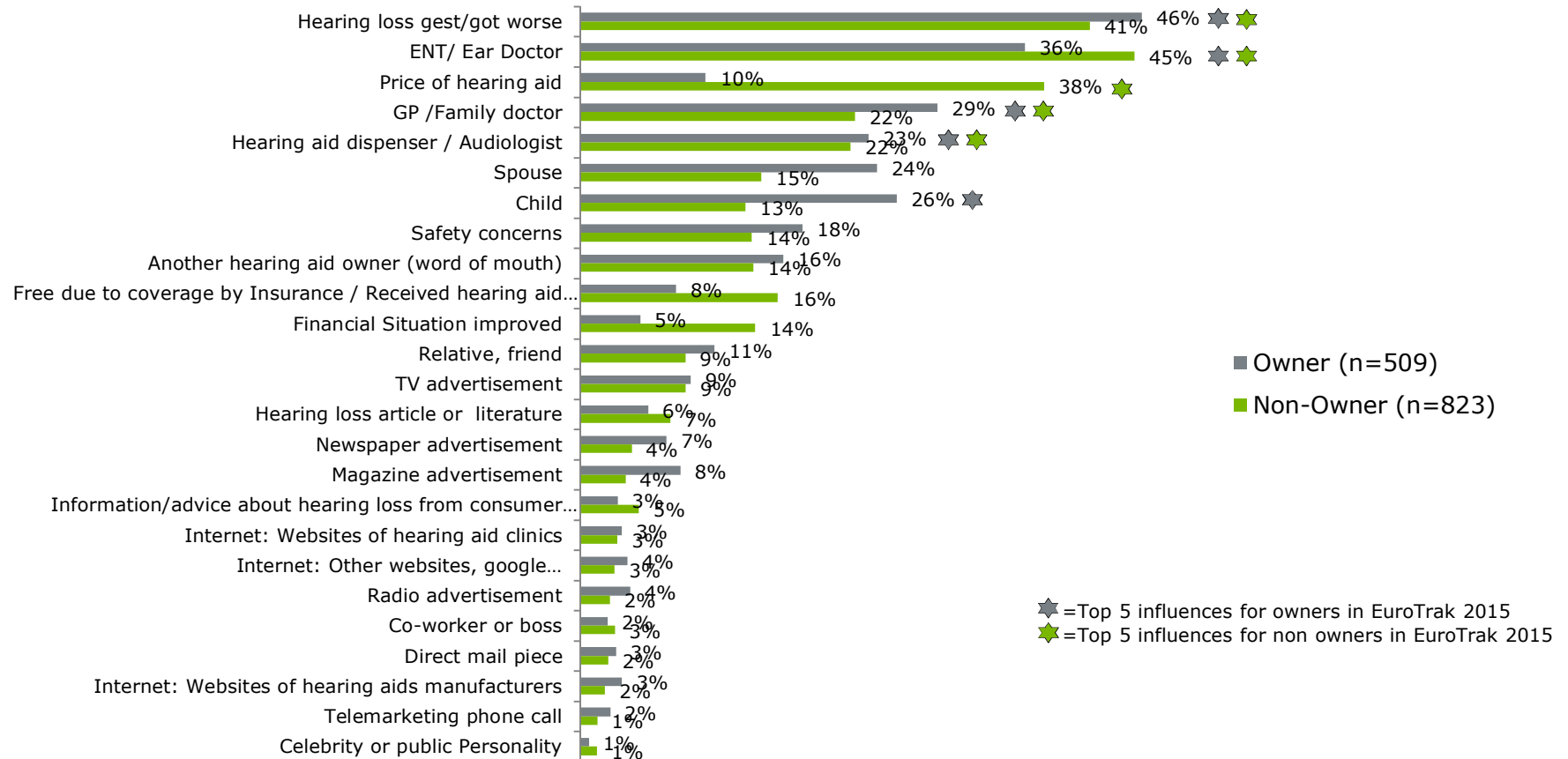
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## Most important triggers to buy

# The most important influencing factors are worsening hearing loss, ENT, GP and significant others (and: price for non owners)

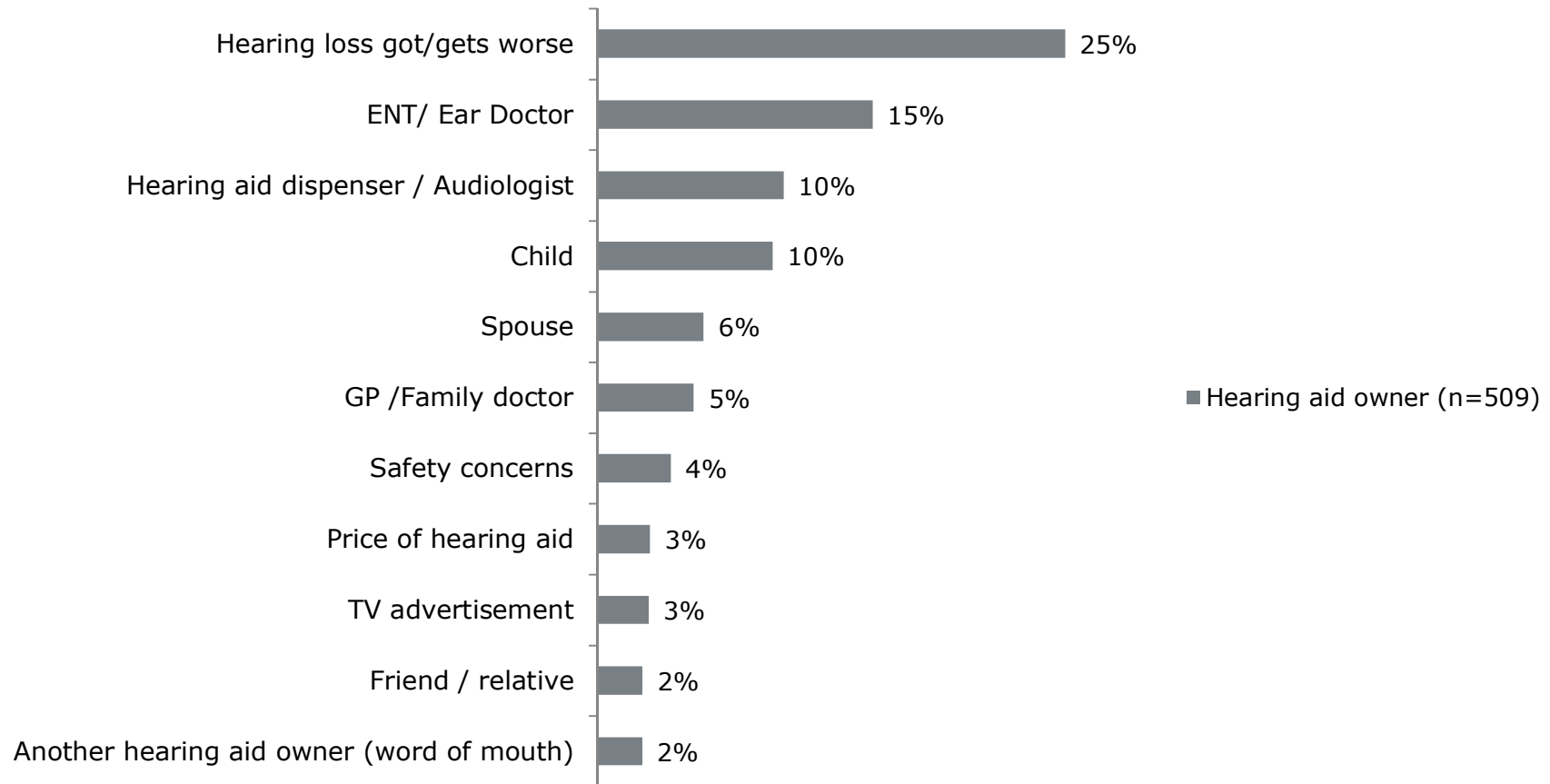
**Non-owner:** Think about the option to obtain / purchase a hearing aid. What do you think would influence you to obtain / purchase a hearing aid ?

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



# The most important trigger to buy a hearing aid is worsening hearing loss, the ENT and the audiologist.

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





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# APPENDIX

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# 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 of an interval  $\pm 3.1$  around 15% - which means between 11.9% and 18.1% (Conservative assumption: 95% confidence level)

Sample size	Random sample error	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
	Real value is within interval:	
50	$\pm 13.9$	$\pm 9.9$
100	$\pm 9.8$	$\pm 7.0$
250	$\pm 6.2$	$\pm 4.4$
500	$\pm 4.4$	<b><math>\pm 3.1</math></b>
1000	$\pm 3.1$	$\pm 2.2$
5'000	$\pm 1.4$	$\pm 1.0$
10'000	$\pm 1.0$	$\pm 0.7$



# Demographics (1) Hearing instrument adoption rates and populations

		Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	Profiles: Categories add to 100%*		
					No hearing loss	Hearing loss but no hearing aid	Hearing aid
<b>Gender</b>							
	Male	7'236	13.4%	29.2%	47.5%	53.5%	52.7%
	Female	7'779	10.9%	29.8%	52.5%	46.5%	47.3%
<b>Age recoded</b>							
	1 - 14	2'042	2.0%	60.0%	15.2%	1.3%	4.5%
	15 - 24	1'442	2.6%	29.1%	10.6%	2.1%	2.0%
	25 - 34	1'683	5.4%	26.3%	12.1%	5.3%	4.5%
	35 - 44	2'145	7.7%	24.9%	15.0%	9.7%	7.7%
	45 - 54	2'450	9.4%	17.2%	16.8%	14.8%	7.4%
	55 - 64	1'996	14.6%	23.7%	12.9%	17.3%	12.8%
	65 - 74	1'596	21.2%	25.0%	9.5%	19.8%	15.8%
	74+	1'661	37.5%	38.9%	7.9%	29.7%	45.3%
<b>Type of household</b>							
	single household	976	25.4%	33.0%	5.5%	12.9%	15.3%
	Couple, no kids	2'339	15.4%	28.8%	15.0%	20.0%	19.4%
	Couple with kid(s)	9'595	9.5%	27.8%	65.8%	51.4%	47.2%
	Single mom/dad with kid(s)	733	11.0%	42.3%	4.9%	3.6%	6.4%
	Retirement home, hospital etc.	74	42.7%	70.6%	0.3%	0.7%	4.2%
	Other	1'298	14.2%	21.9%	8.4%	11.3%	7.6%

# Demographics (2) Hearing instrument adoption rates and populations

			Profiles: Categories add to 100%*			
	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
<b>Status</b>						
The head of the household (alone or together with someone)	6'059	20.0%	29.5%	36.7%	66.9%	66.7%
The spouse of the head of the household	3'864	10.7%	28.8%	26.1%	23.0%	22.2%
Daughter/son of head of household	4'431	2.3%	30.9%	32.8%	5.5%	5.9%
Other person	660	13.2%	31.5%	4.3%	4.7%	5.2%
<b>Employment</b>						
Full time employed	4'957	10.9%	25.0%	39.9%	32.1%	26.5%
Part time employed	1'361	6.6%	17.1%	11.5%	5.9%	3.0%
Unemployed / not working	2'012	7.5%	21.9%	16.8%	9.3%	6.4%
Retired under a disability pension scheme (fully or partly)	340	30.9%	40.8%	2.1%	4.9%	8.4%
Early retired under an early retirement benefit scheme	370	21.7%	37.6%	2.6%	4.0%	5.9%
Retired (at the official retirement age)	2'703	28.9%	31.7%	17.3%	42.3%	48.6%
Student / pupil / in training	1'107	2.2%	22.0%	9.8%	1.5%	1.1%
<b>Education</b>						
Scuola elementare	1'051	31.0%	31.2%	6.6%	17.7%	19.9%
Scuola media inferiore	2'187	15.6%	29.9%	16.7%	19.0%	20.0%
Scuola media superiore	4'922	11.5%	23.8%	39.3%	34.1%	26.4%
Formazione professionale	1'238	12.1%	34.5%	9.8%	7.8%	10.1%
Università	3'307	11.6%	30.8%	26.4%	21.1%	23.2%
Altro	144	4.2%	31.2%	1.2%	0.3%	0.4%