

## Results

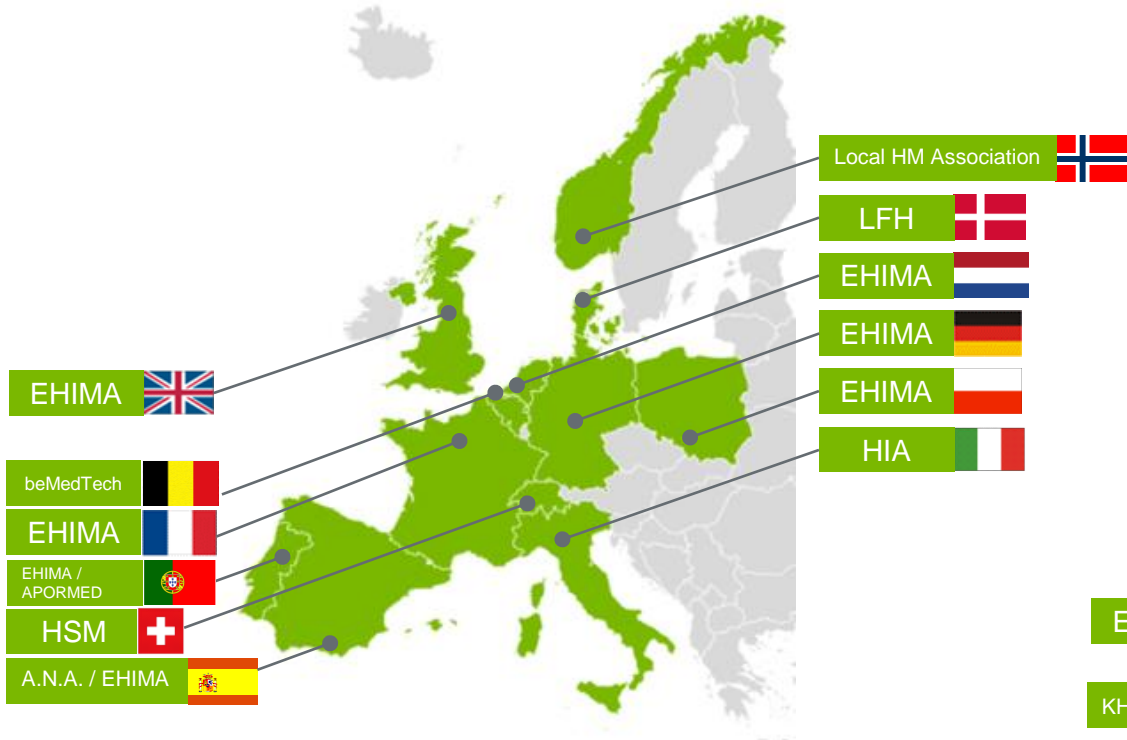
# EuroTrak Portugal (POR) 2024

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

# Summary

## 1. Introduction

EuroTrak POR 2024 is part of the EuroTrak / APACTrak studies:



EuroTrak POR 2024 was designed and executed by Anovum (Zurich) on behalf of EHIMA and APORMED.

Sample sizes:

Representative sample (sample 1): n=15'222 people

Hearing impaired (sample 2): n=1'039 people

Hearing impaired non-owners (HA Non-owner): n=659 people

Hearing aid owner (HA Owner): n=380 people



# Summary

## 2. Market overview

- **Stated hearing loss prevalence**
  - Total: 10.1%, 18+: 11.6%.
  - Hearing Tests: Hearing Tests: 29% had a hearing test in the last five years, most of which were done by ENTs, followed by HA dispensers / Audiologists.
- **Hearing aid adoption rate (HA penetration)**
  - 23.2% of those with self-declared HL.
  - 2.3% of total population.
  - 67% of HA owners have binaural treatment.
- **The route to the hearing aid**
  - 76% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 46% got hearing aids recommended from the ENT or family doctor (drop out rate=40%).
  - 66% of the GP consultations referred to an ENT, 17% to an HA dispenser / Audiologist, and 11% to get hearing aids. 20% recommended no action.
  - 23% of ENT consultations were referred to an Audiologist, 40% recommended getting a hearing aid, and 43% recommended no action.
- **Potential social cost-savings due to the use of hearing aids**
  - Hearing aids are believed to have a positive impact on the job.
  - Hearing aid owners have a lower risk of being depressed.
  - Quality of sleep seems to improve if the hearing impaired use hearing aids.
  - Hearing aid owners are less exhausted in the evening.

# Summary

## 3. Analysis of hearing aid owners

- **Hearing aid ownership, usage, and accessories**
  - 52% of all HA owners received some 3rd party reimbursement.
  - 57% of the currently owned HAs were acquired in 2022 or later.
  - The median age of hearing aids before replacement is five years.
  - On average, HAs are worn 9.5 hours a day.
  - RICs are the most often purchased type of HA.
  - Cochlear Implants: 21% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
  - 21% of HA owners use a hearing aids app, and 76% are satisfied.
  - 11% 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**
  - 84% of the hearing aid owners say their hearing aid works better than or as expected.
  - 81% of the HA owners are satisfied with their HAs.
  - The more hours worn per day, the higher the satisfaction with the HA.
  - Satisfaction with newer hearing aids is higher than with older hearing aids.
  - Talking at home with family members, talking on a phone and watching TV with others are the most frequent important listening situations.
- **Positive impact of HAs**
  - There is a significant positive impact of HAs on different aspects: Ability to participate in group activities, communication effectiveness, sense of safety and social life improved.
  - 88% of the hearing aid owners feel more confident moving in a city since wearing hearing aids.
  - 98% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.

# Summary

## 4. Analysis of hearing impaired non-owners

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

- Only 25% 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 having hearing aids are that people say that they can't afford hearing aids and they are uncomfortable.
- 4% who own hearing aids don't use them (0 hours); 10% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**

- 73% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely that somebody makes fun of or rejects a hearing impaired without a hearing aid.
- The most important influencing factors for HA owners were worsening hearing loss, ENT, GP, child, spouse, and an audiologist. For the Non-owners, financial aspects play a crucial role (price, insurance coverage)

# Detailed Results: Roadmap

## 1. Introduction

- Organisation of EuroTrak POR 2024
- 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 POR 2024

## Organisation

- Principal of the project EuroTrak POR 2024 are: EHIMA and APORMED.
- Anovum Zurich developed the concept of EuroTrak POR, 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 POR/2024/n=[relevant sample size]”**
- Member companies of the principal can ask Anovum to further analyse the raw data in specific ways at their own expense.



# Recruitment process: In search of hearing impaired people

## Step 1: Screening interviews

Objective: Prevalence of hearing loss and hearing aid ownership

Process:

1. Representative sample with strict quotas that represent the overall population (Age/Gender interlocked; soft quota on region)
2. Contacts from large panellist pools
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n=15'222** 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= 659** hearing impaired non-owners and **n=380** hearing aid owners



## 2. Market overview

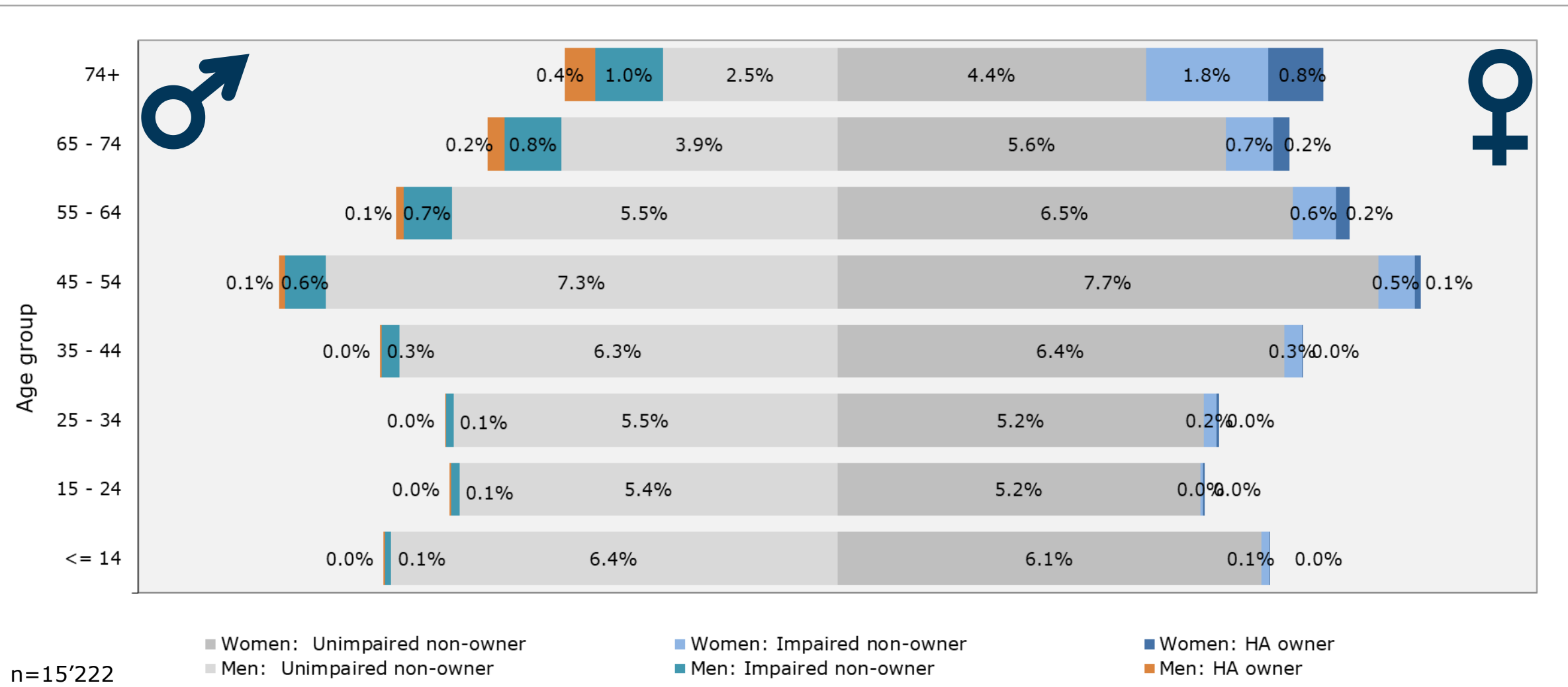




# Prevalence of hearing loss and adoption rate



# Hearing loss and hearing instrument ownership by gender/age



n=15'222

Women: Unimpaired non-owner    
  Women: Impaired non-owner    
  Women: HA owner  
 Men: Unimpaired non-owner    
  Men: Impaired non-owner    
  Men: HA owner

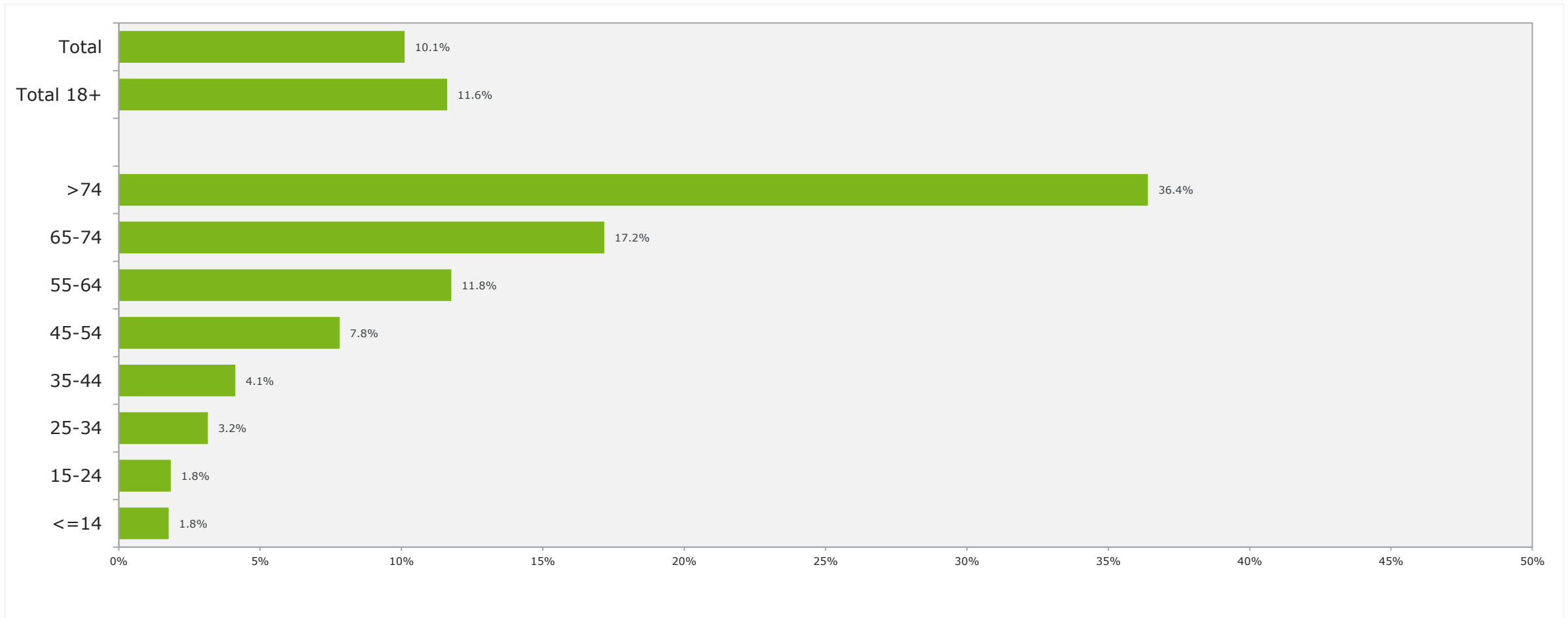




# Hearing loss prevalence POR

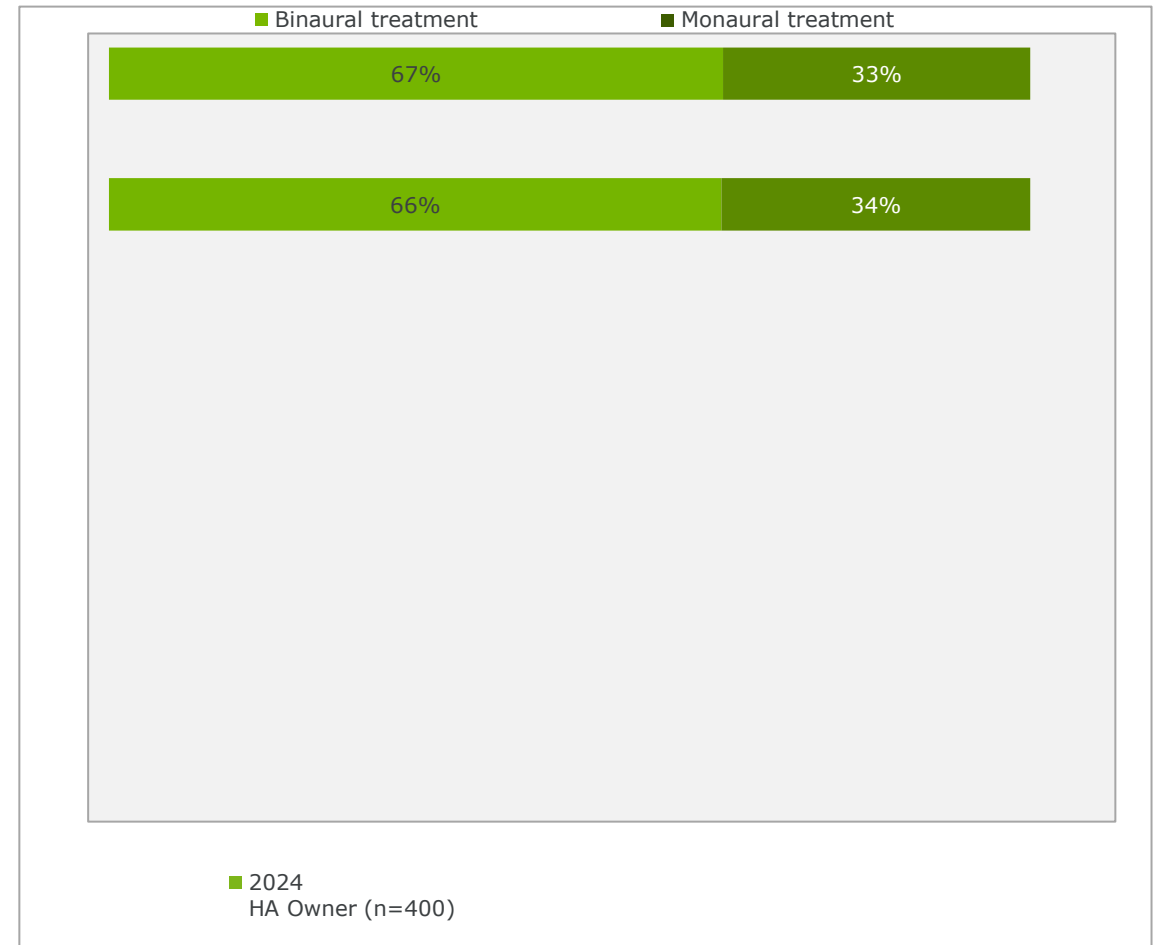
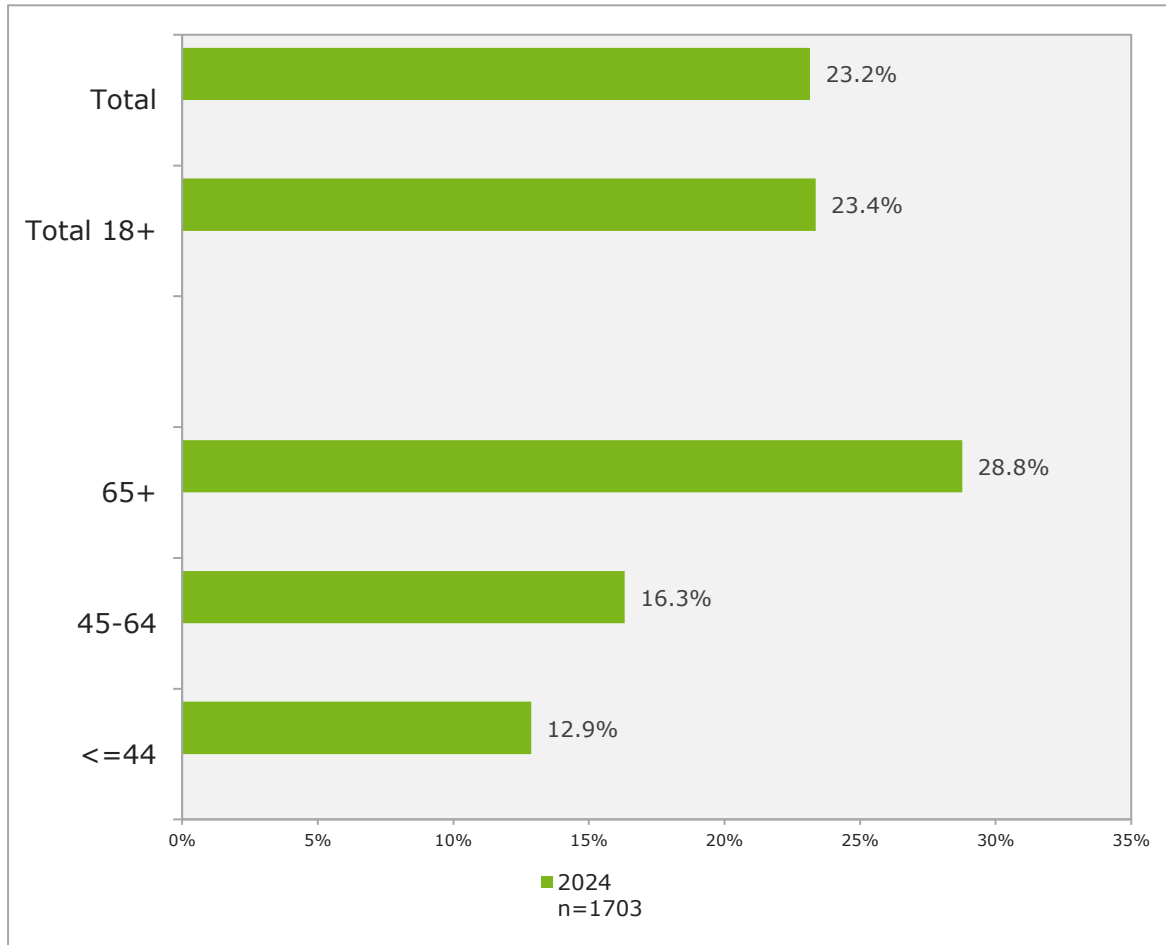
## Self-declared hearing loss

% hearing loss prevalence



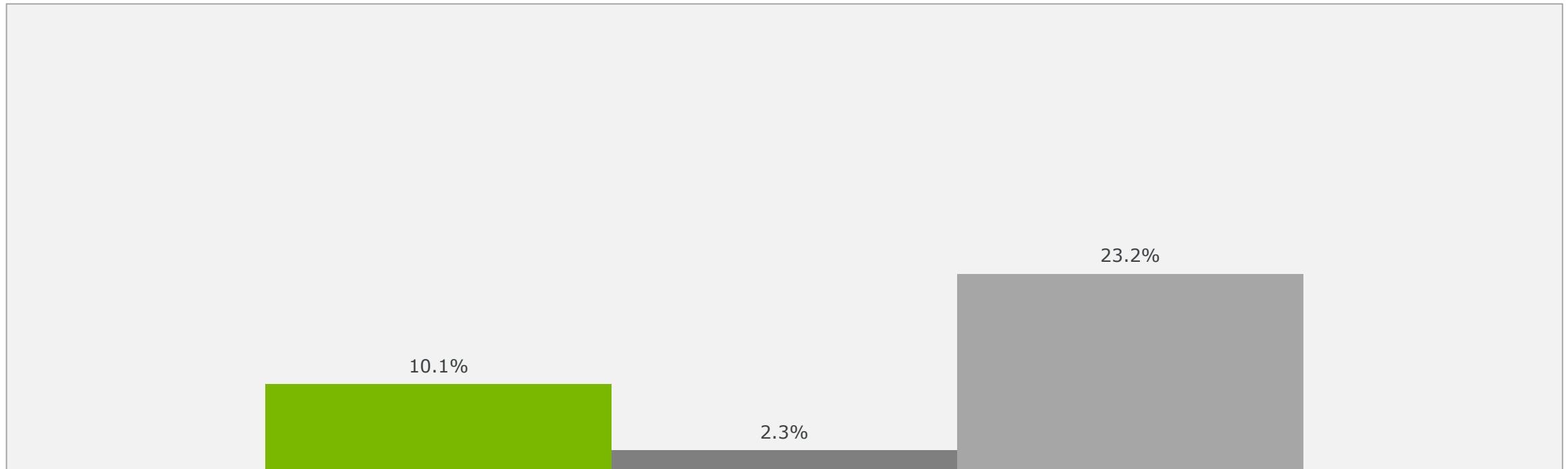
# Hearing aid adoption rate: 23% of the hearing impaired have hearing aid(s), and 67% of them have binaural treatment

% of hearing impaired





# Overview of hearing loss prevalence and hearing aid adoption



EuroTrak POR 2024

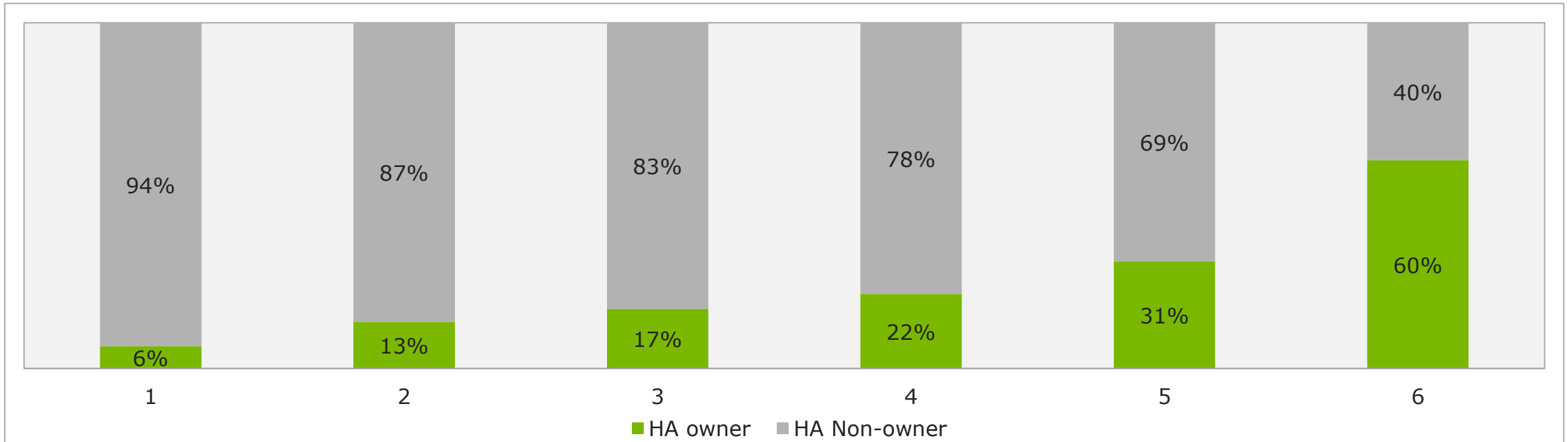
- Hearing impaired (self-stated)
- HA Adoption (people with hearing aids in % of population)
- HA Adoption rate (people with hearing aids in % of hearing impaired)

n=15'222





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



Hearing loss sixtile-groups

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

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

HA Owner n=380  
HA Non-owner n=659





# Hearing loss

Hearing loss characteristics: Owners compared to non-owners

|                               | HA Non-owner<br>n=659 | HA Owner<br>n=380 | Hearing Aid Adoption (%) |
|-------------------------------|-----------------------|-------------------|--------------------------|
| <b>Ears impaired (stated)</b> |                       |                   |                          |
| Unilateral loss               | 33%                   | 22%               | 18%                      |
| Bilateral loss                | 67%                   | 78%               | 28%                      |
|                               |                       |                   |                          |
| <b>Perceived loss</b>         |                       |                   |                          |
| Mild                          | 37%                   | 6%                | 5%                       |
| Moderate                      | 46%                   | 44%               | 23%                      |
| Severe                        | 14%                   | 40%               | 47%*                     |
| Profound                      | 3%                    | 10%               |                          |

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

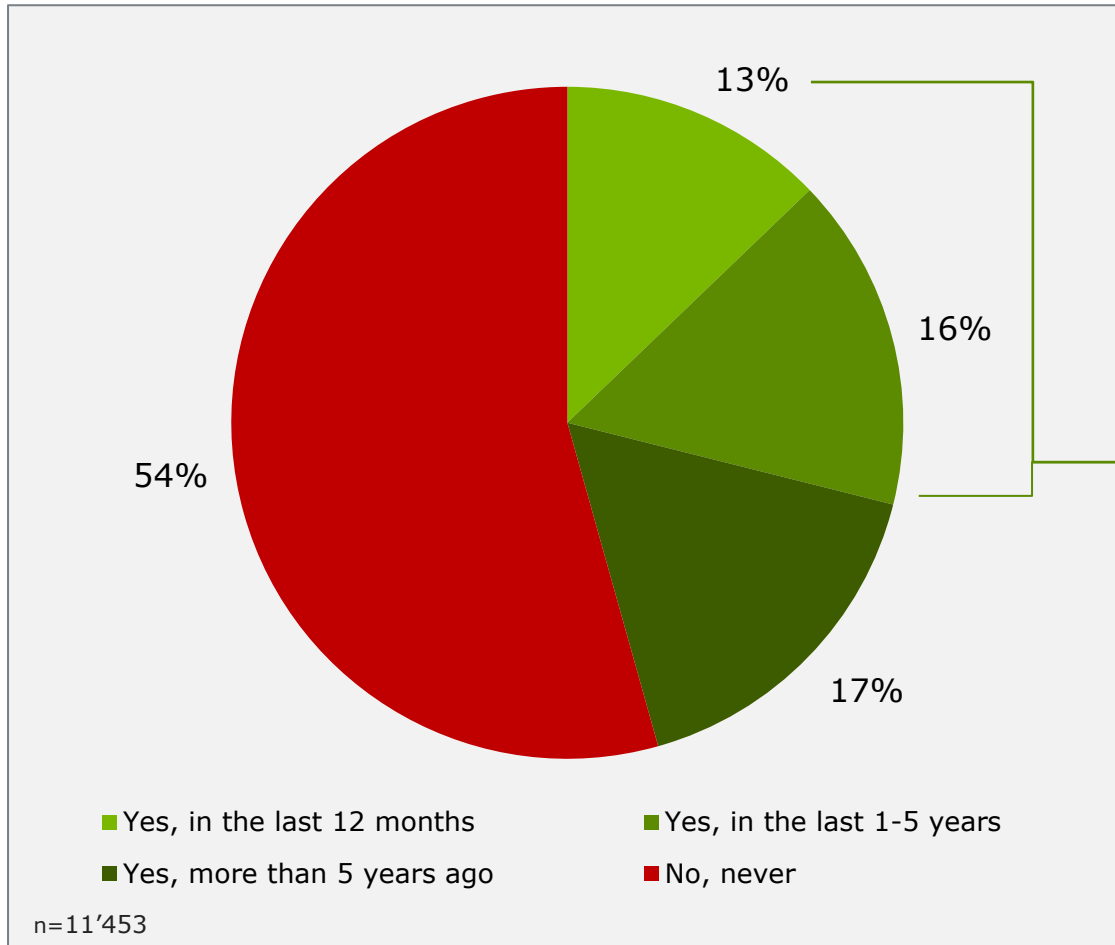


# Hearing tests and where hearing is tested

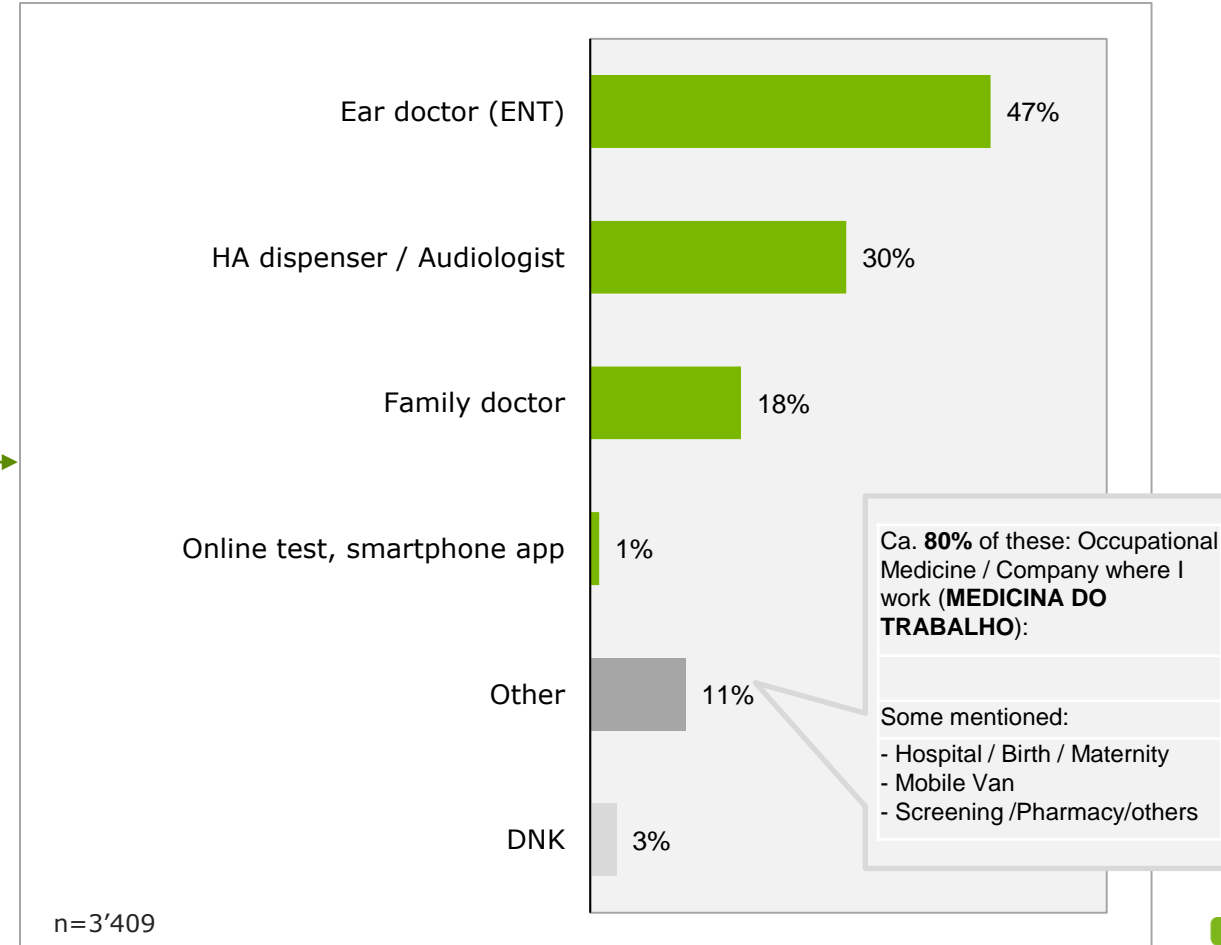


# Hearing Tests: 29% had a hearing test in the last five years, most tests done by ENTs

Have you ever taken a hearing test?



Where/how was your hearing tested?



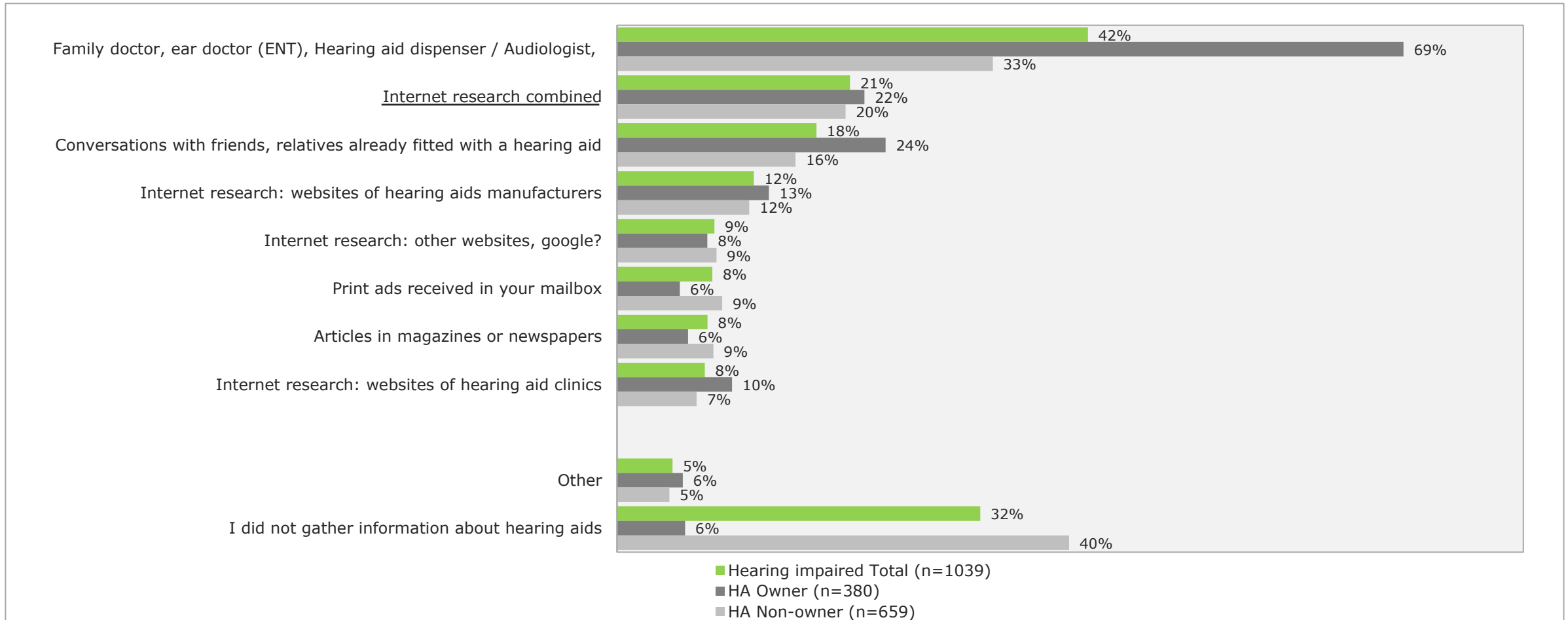


# The route to the hearing aid: Sources of information and drop-out rates



# 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

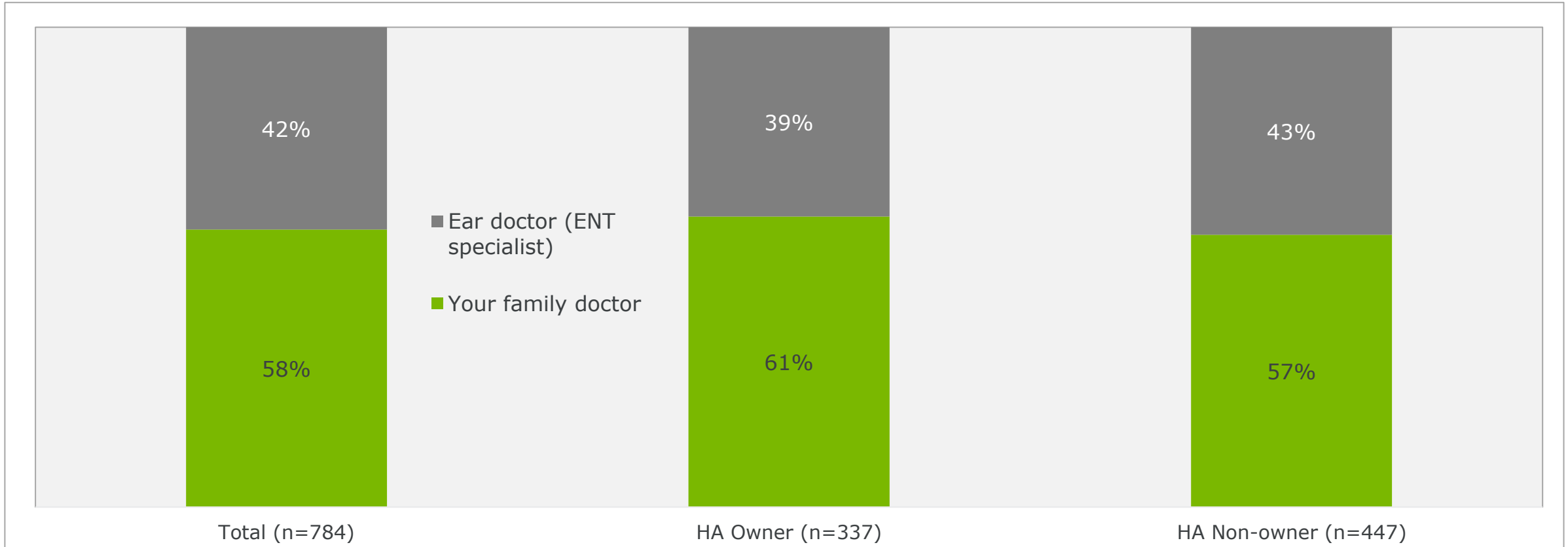
Where did you gather information about hearing aids?



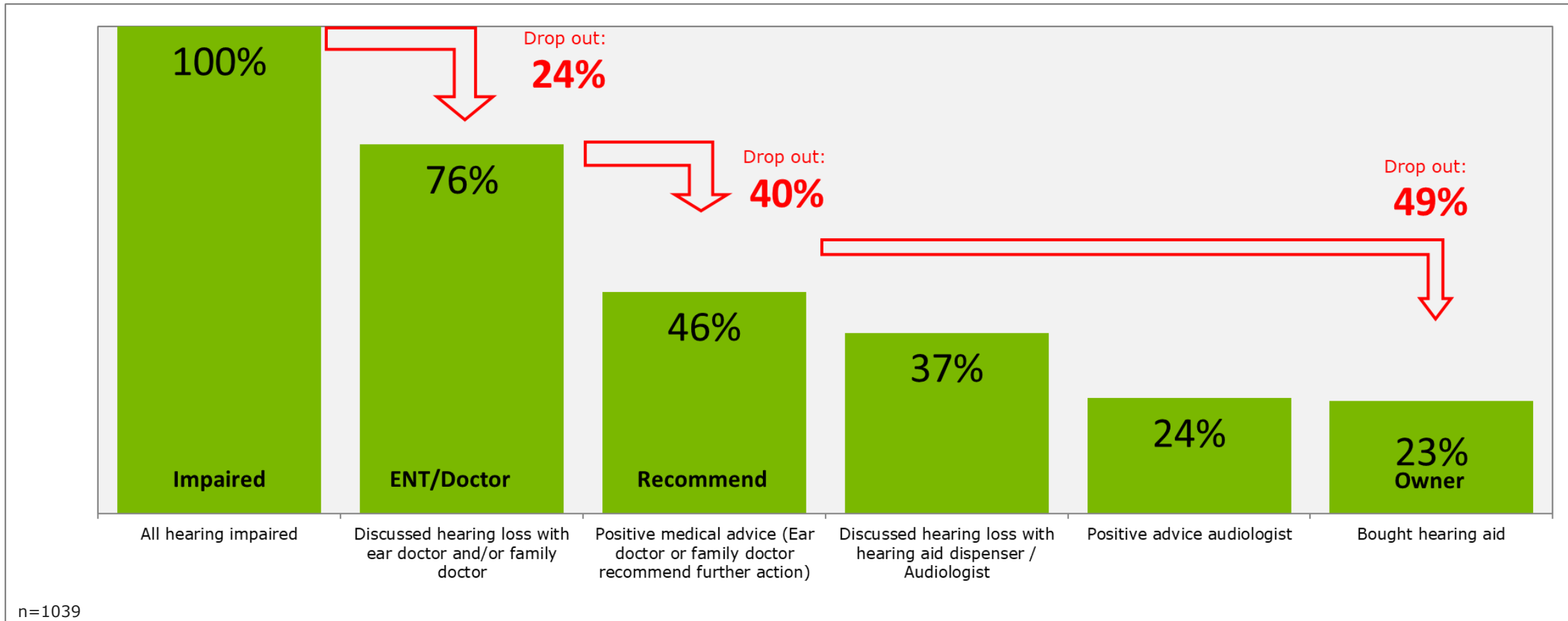


Of those who discussed the hearing loss with a doctor, 58% spoke to a GP/family doctor first, and 42% talked to an ear doctor (ENT) first

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

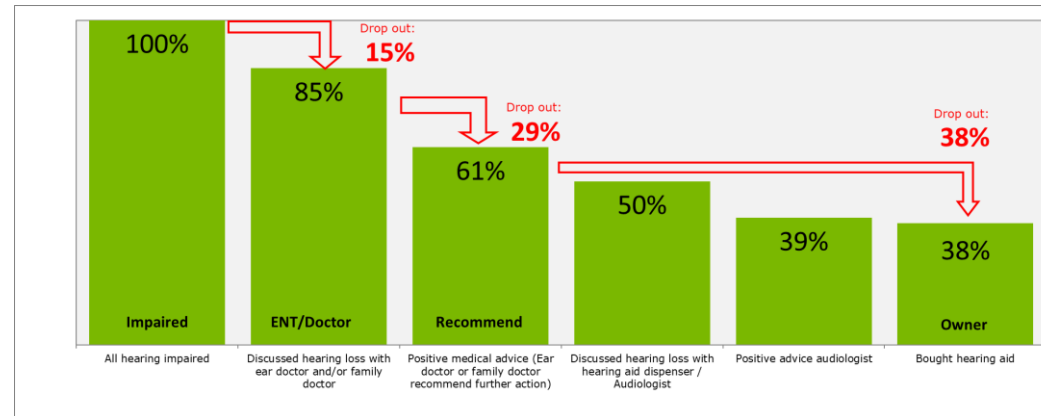


n=1039

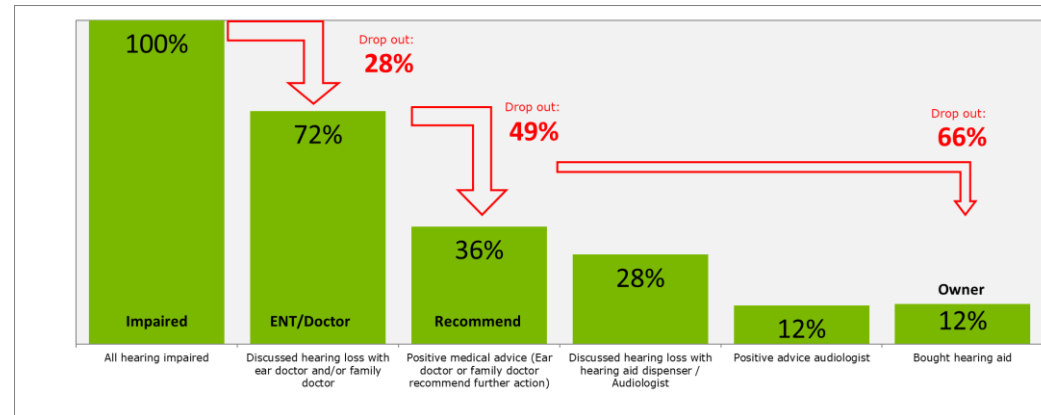


# Much higher drop-out-rates for the lower hearing loss segments

## Top 50% hearing loss\*



## Low 50% hearing loss\*



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

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

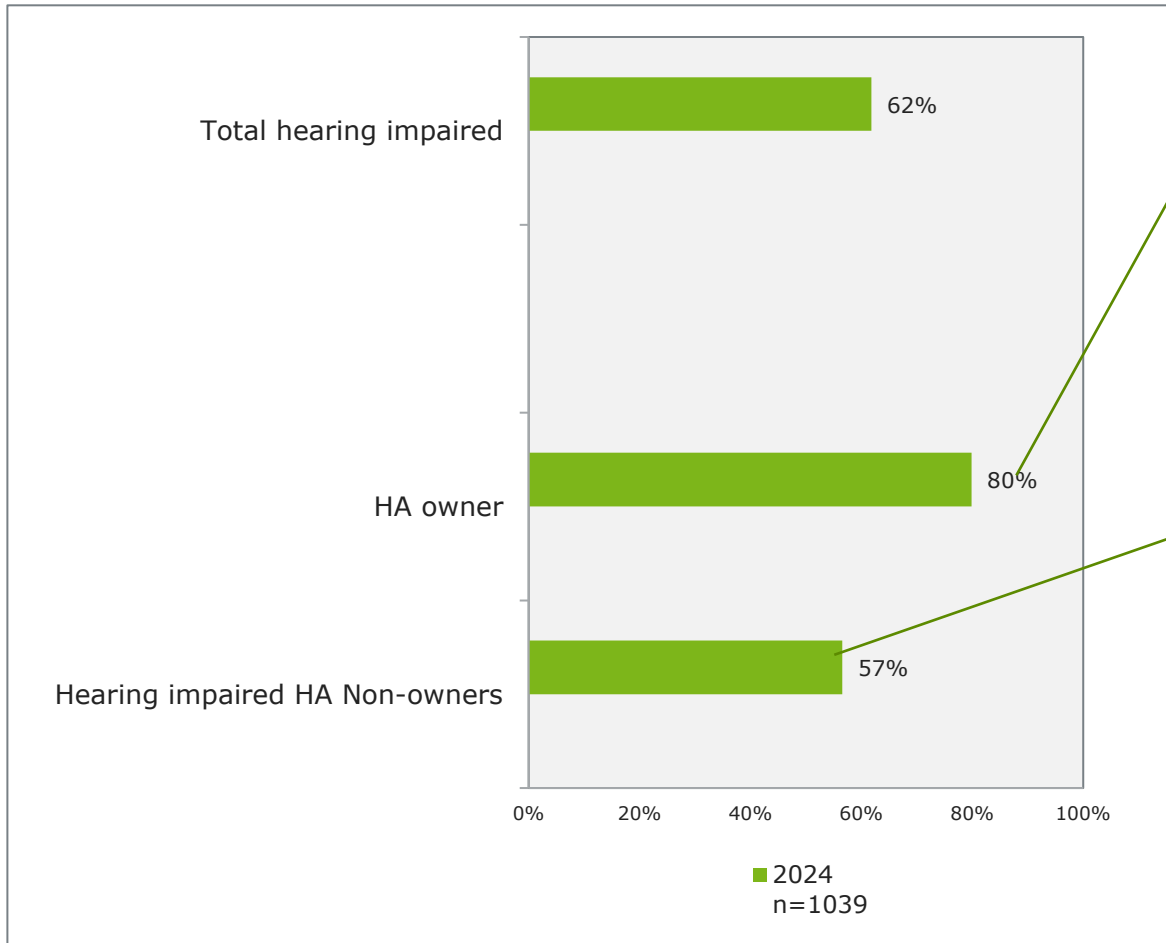




# The route to the hearing aid: GP/Family doctor

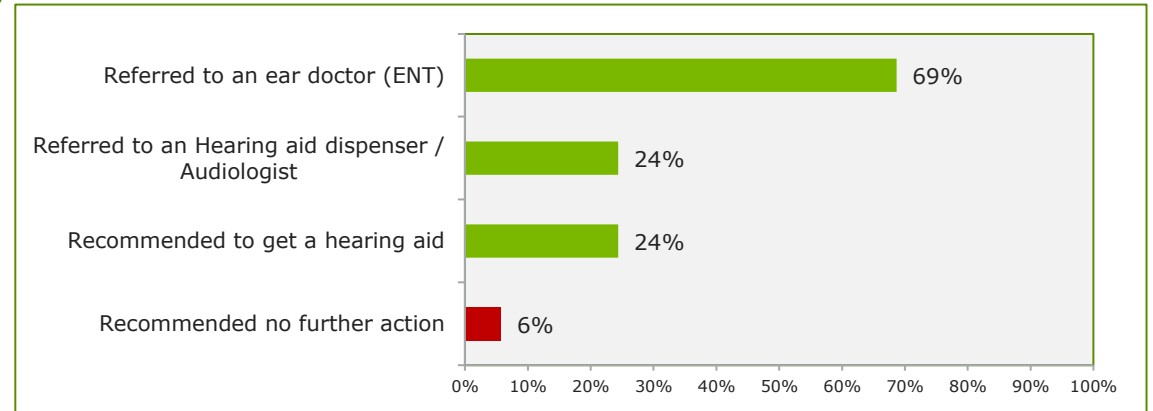
## Have you discussed your hearing problem with your family doctor?

% Discussed with GP

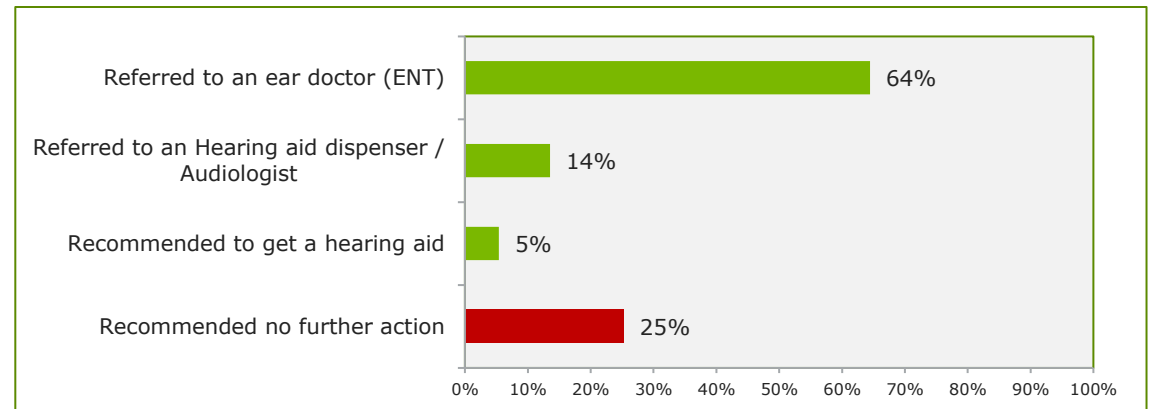


What did he/she recommend ?

HA Owner (n=307)



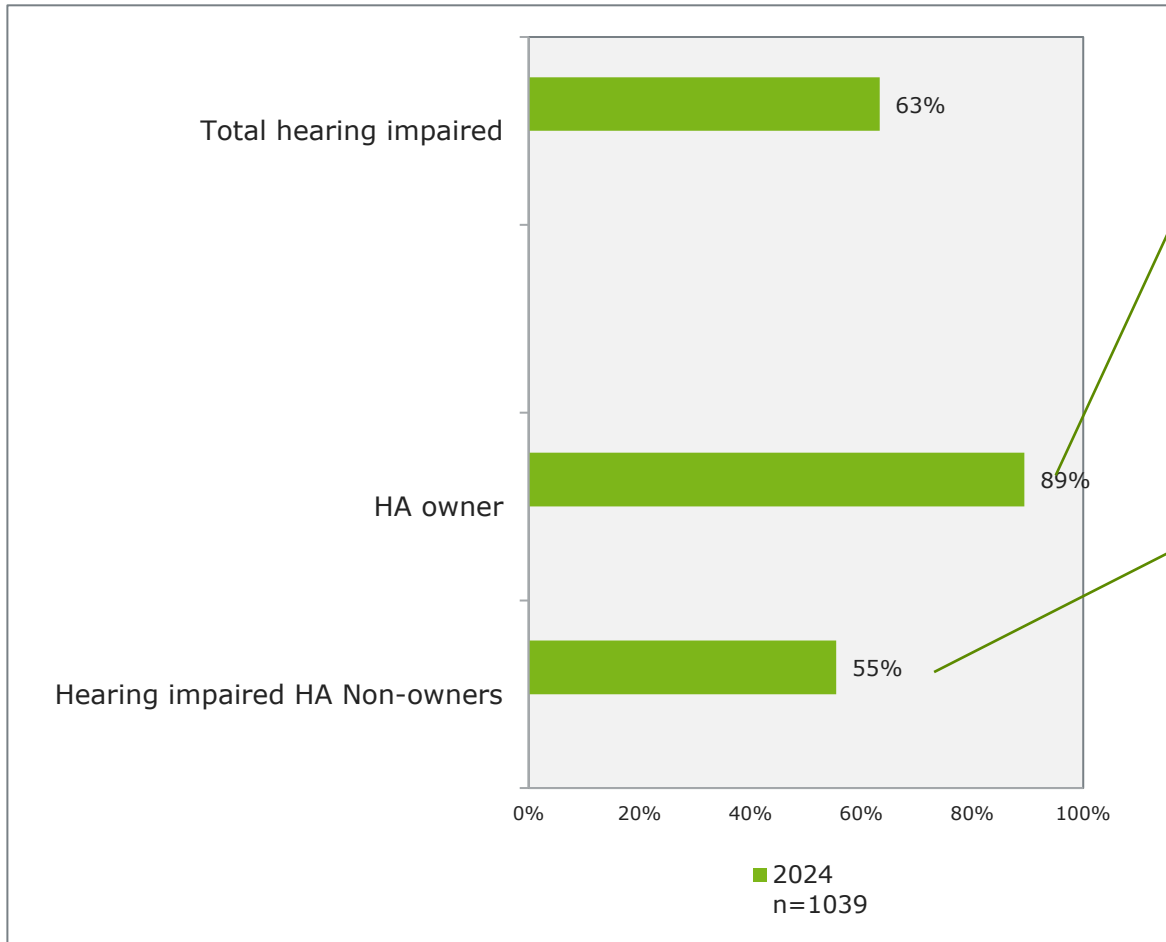
Impaired HA Non-owner (n=370)



# The route to the hearing aid: ENT

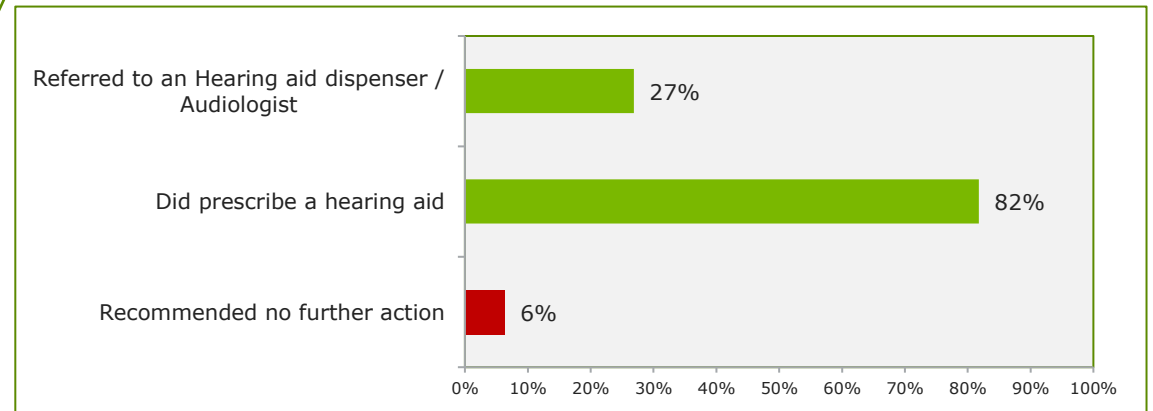
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

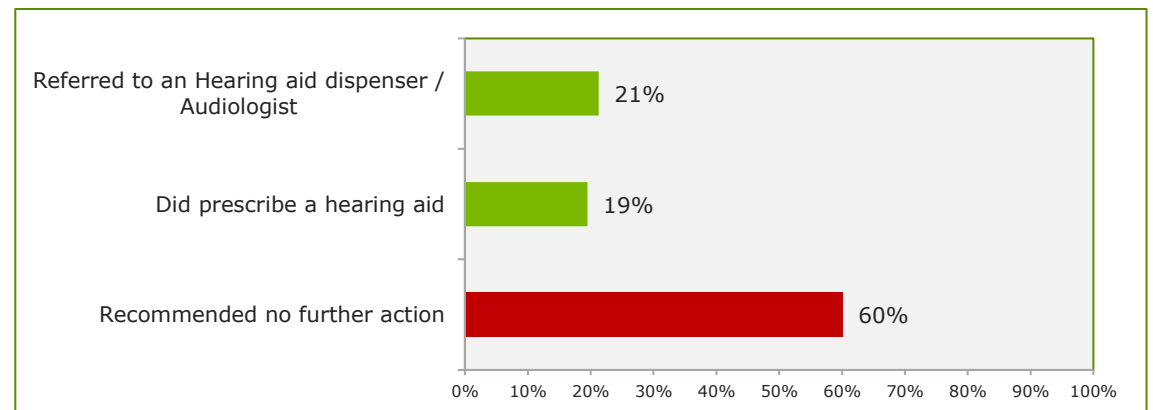


What did he/she recommend ?

HA Owner (n=331)



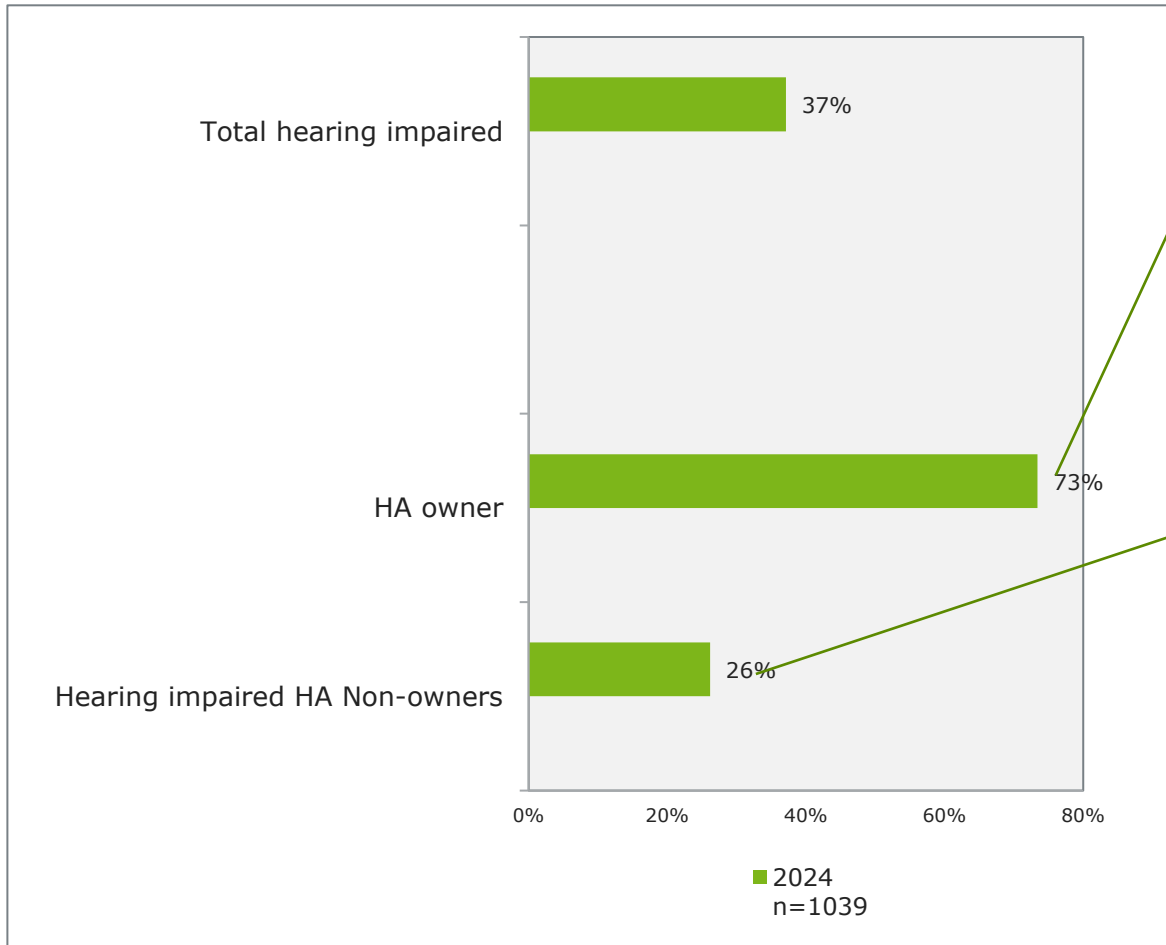
Impaired HA Non-owner (n=390)



# The route to the hearing aid: Audiologist

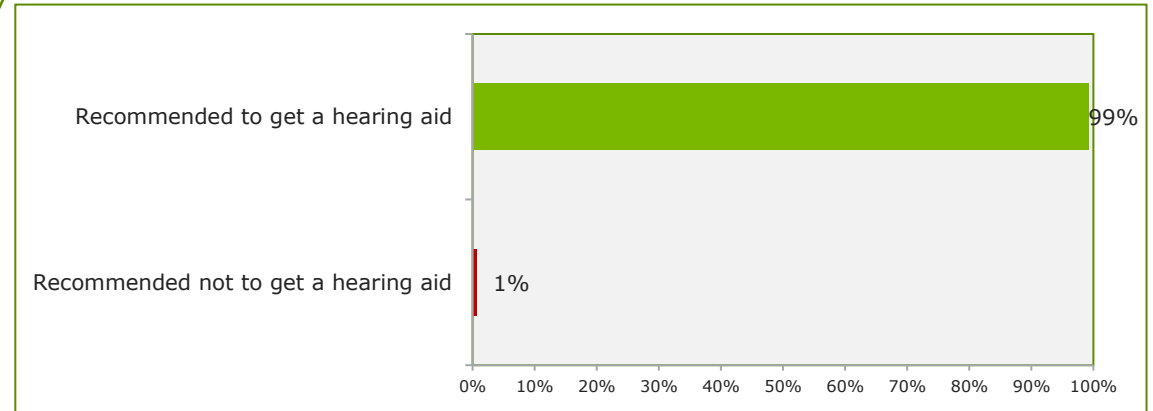
## Have you ever discussed your hearing problem with a HA dispenser / Audiologist?

% Discussed with HA dispenser/ Audiologist

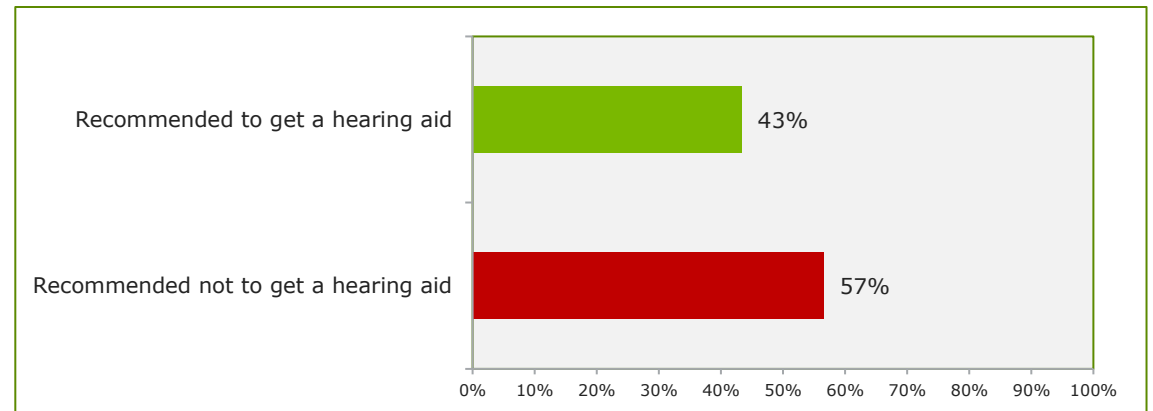


What did he/she recommend ?

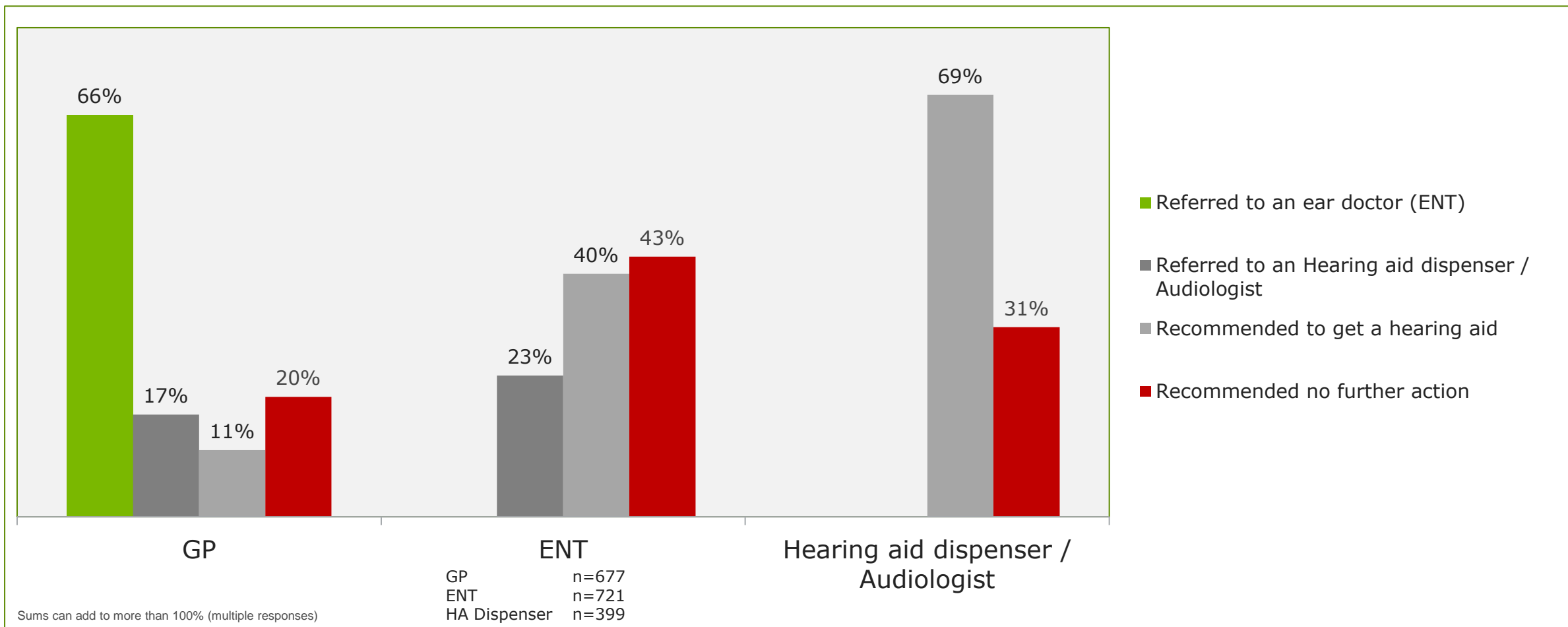
HA Owner (n=237)



Impaired HA Non-owner (n=162)



# Recommendations by profession

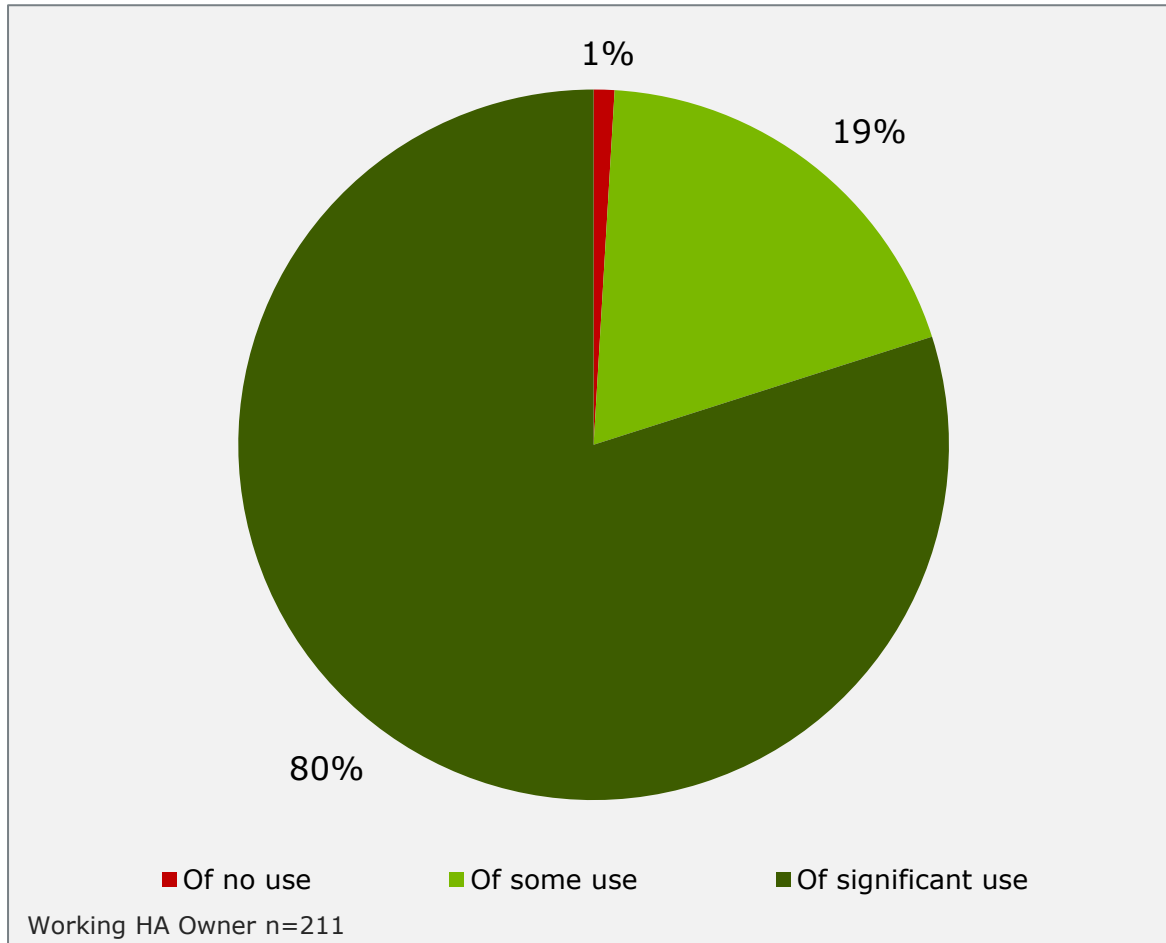


Potential social cost-savings due to the use of hearing aids:

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

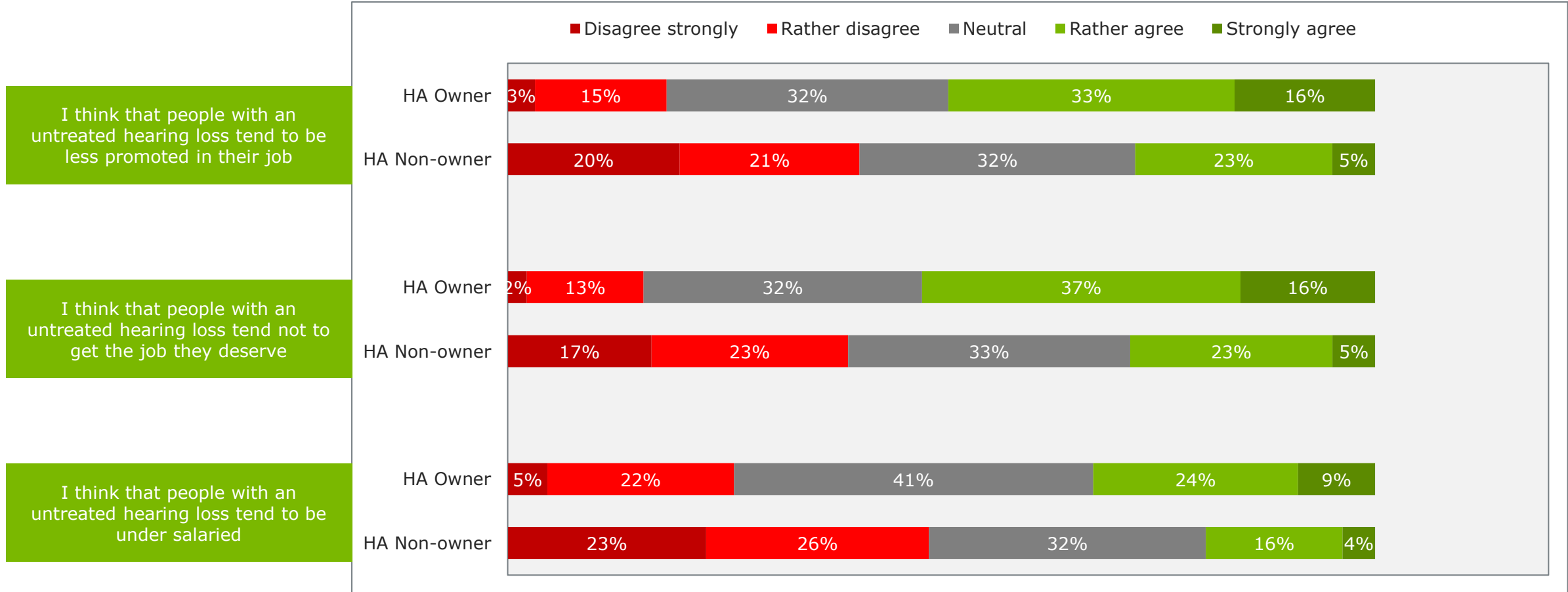
# Work competitiveness: 99% of the working hearing aid owners state that their hearing aid(s) are useful on their job

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=337 / HA Non-owner n=540





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

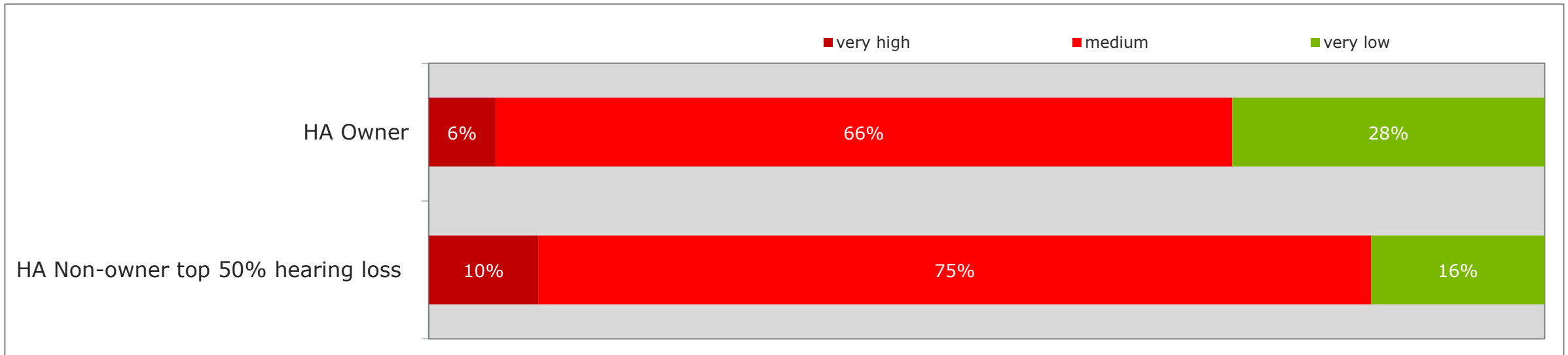
Depression symptoms:

PHQ-2 Screening:

In the last 2 weeks:

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

Probability of major depressive disorder



HA owner n=266 / HA Non-owner top 50% hearing loss n=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).



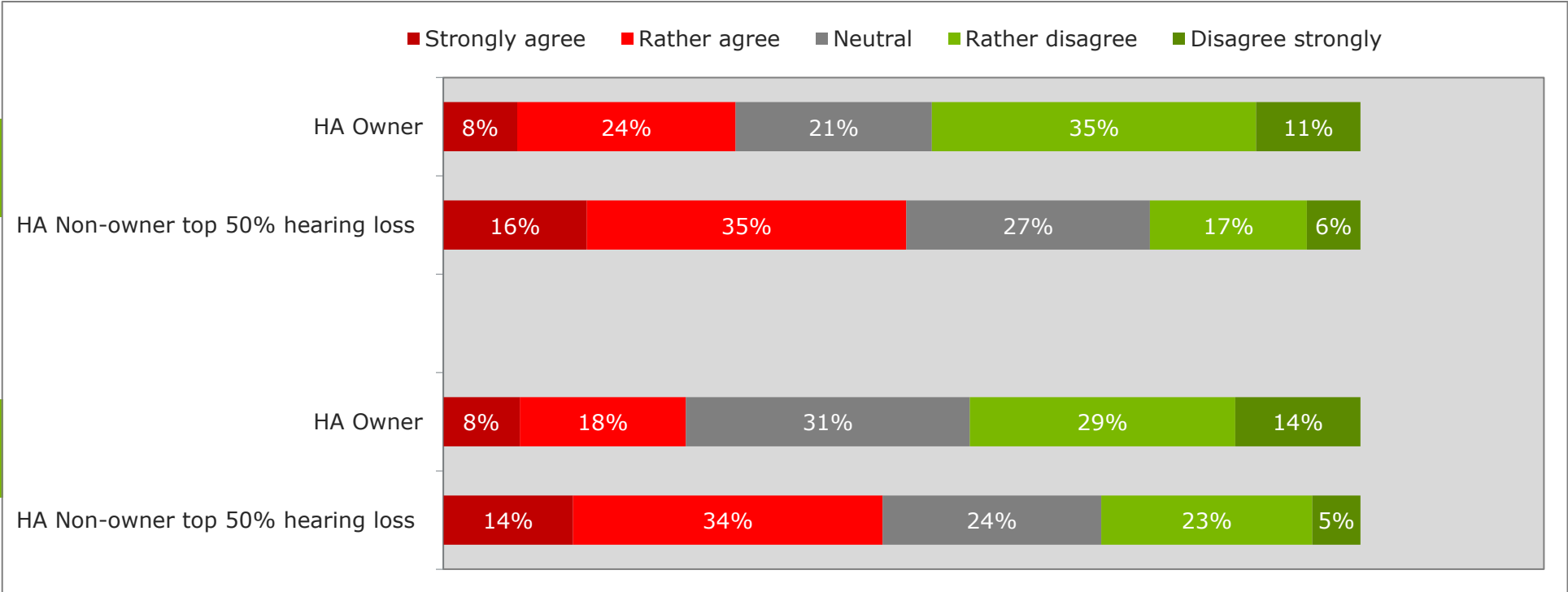




# General health problems: Compared to impaired hearing aid non-owners with significant hearing loss (Top50% hearing loss group\*), hearing aid owners feel less exhausted in the evenings

In the evenings I often feel physically exhausted

In the evenings I often feel mentally exhausted



HA Owner n=266 / HA Non-owner top 50% hearing loss n=132

\*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:

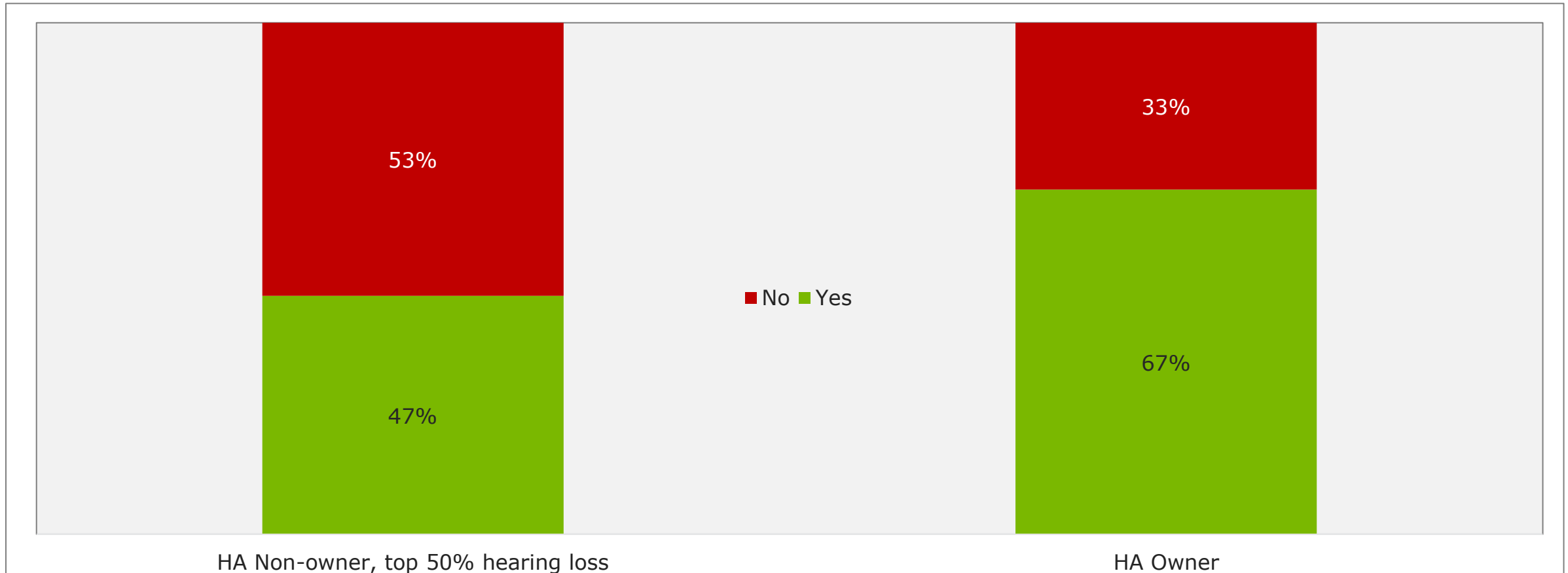
- Number of ears impaired (one or two)
  - Stated hearing loss (Mild to Profound)
  - Scores on 6 APHAB-EC - like questions (Scaled 1-5)
  - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67%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



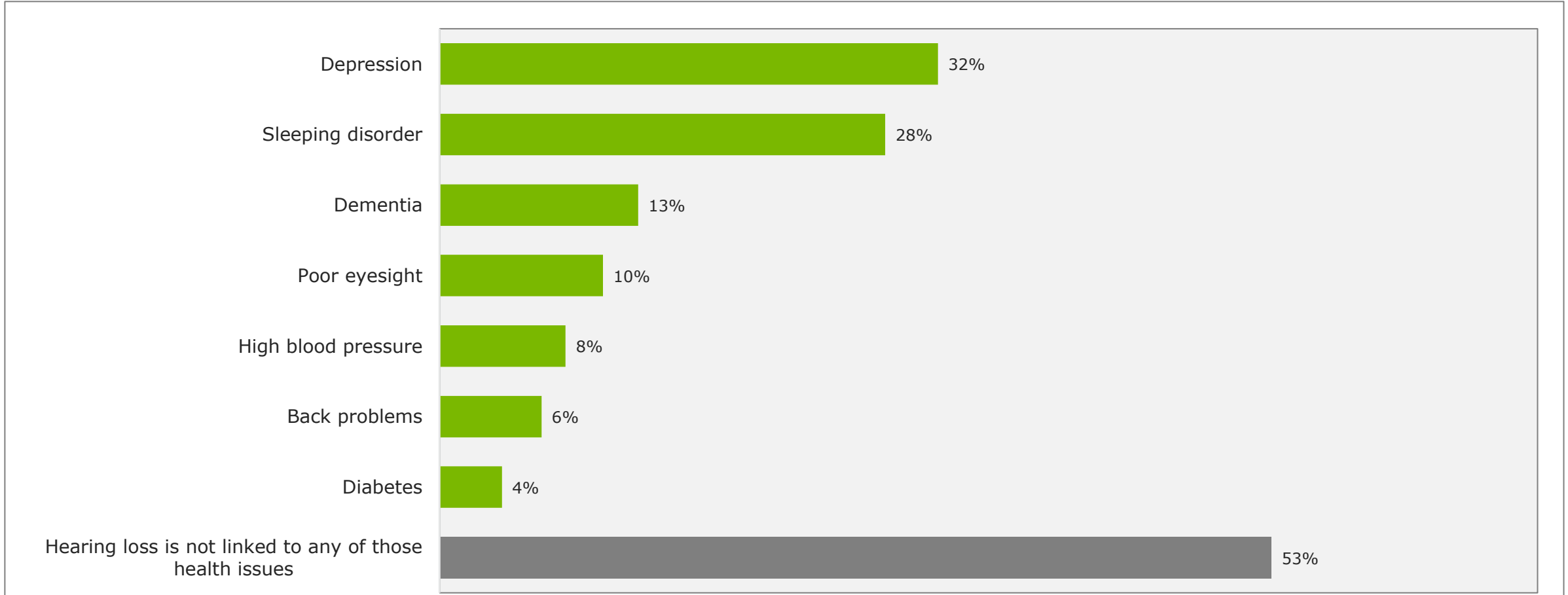
HA Non-owner top 50% hearing loss n=135 / HA Owner n=266





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

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



Hearing impaired, n=1039





# 3. Analysis of hearing aid owners



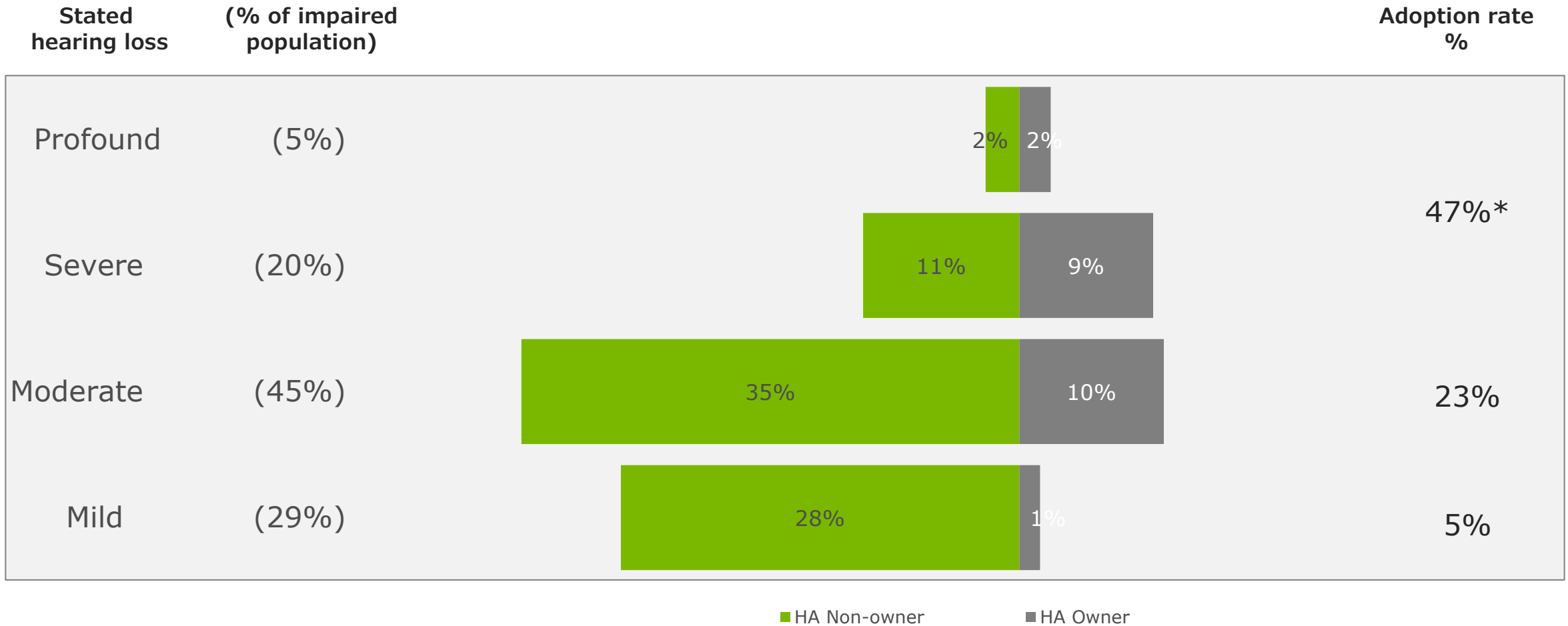


Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage





# Low adoption rates within mild hearing loss



n=1039

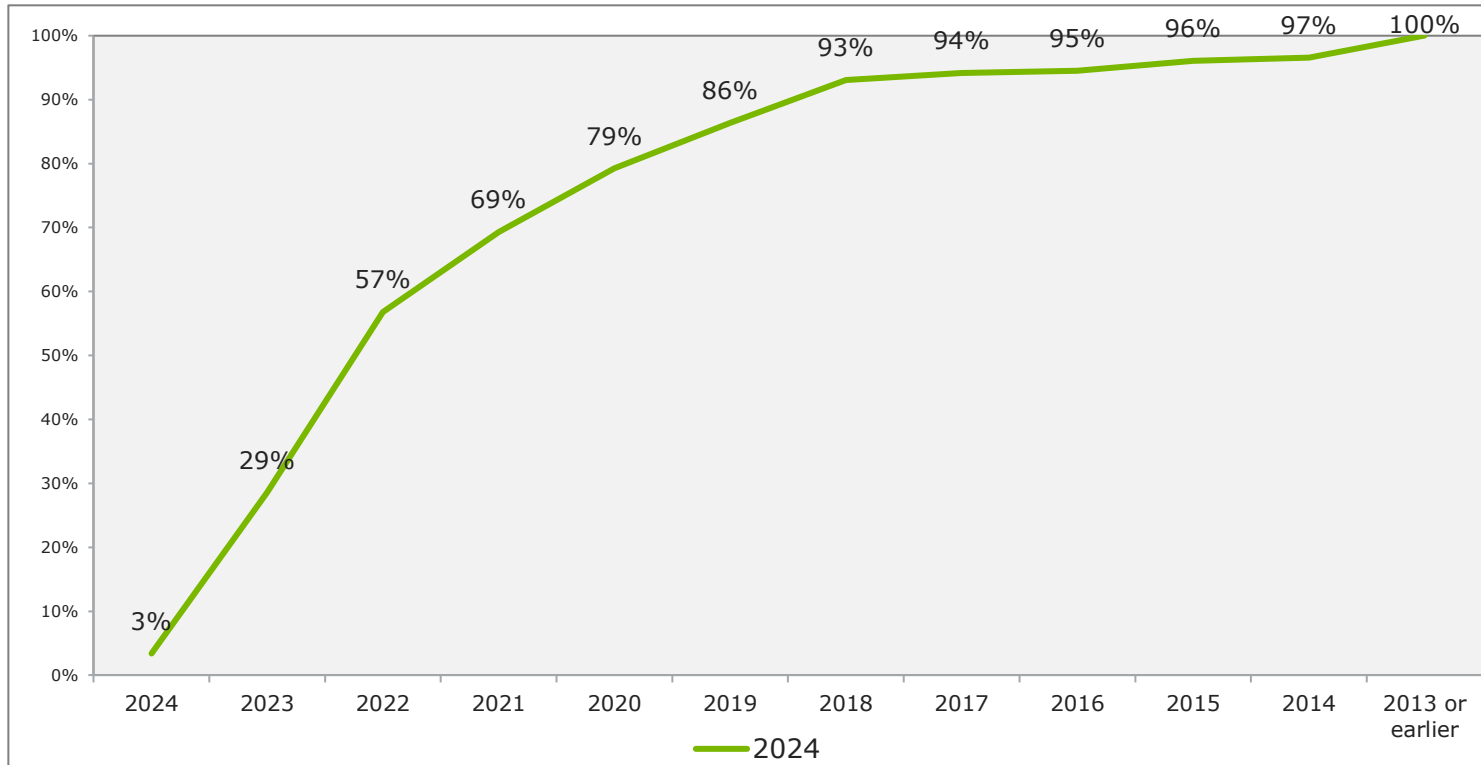
Sums can differ from 100% due to rounding  
 \* combined "severe" and "profound" because n is too small





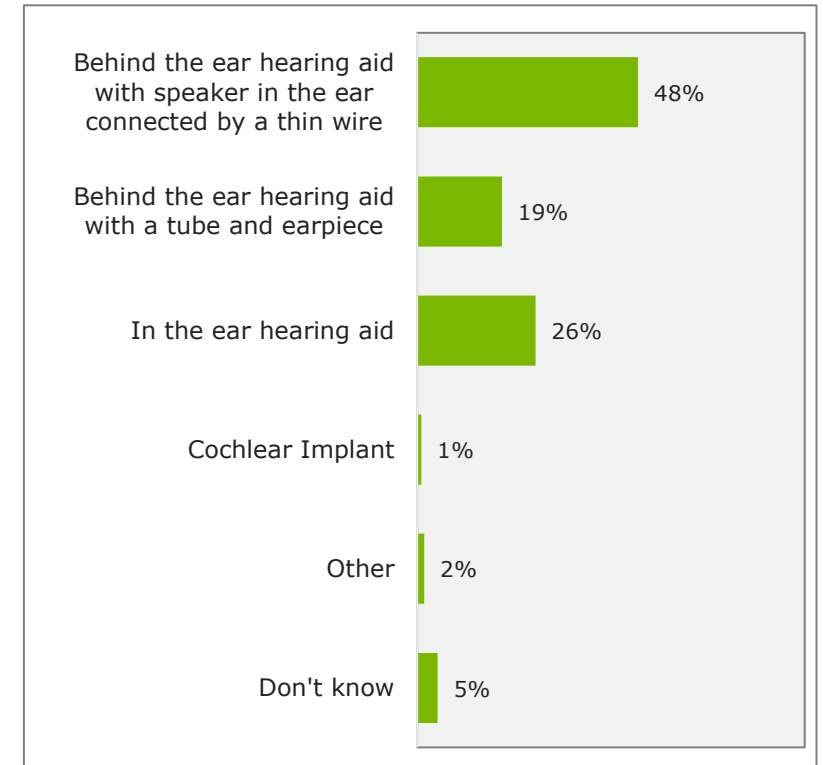
# 57% of the currently owned HAs were acquired in 2022 or later: RICs are the most often purchased type of HA

Year of purchase



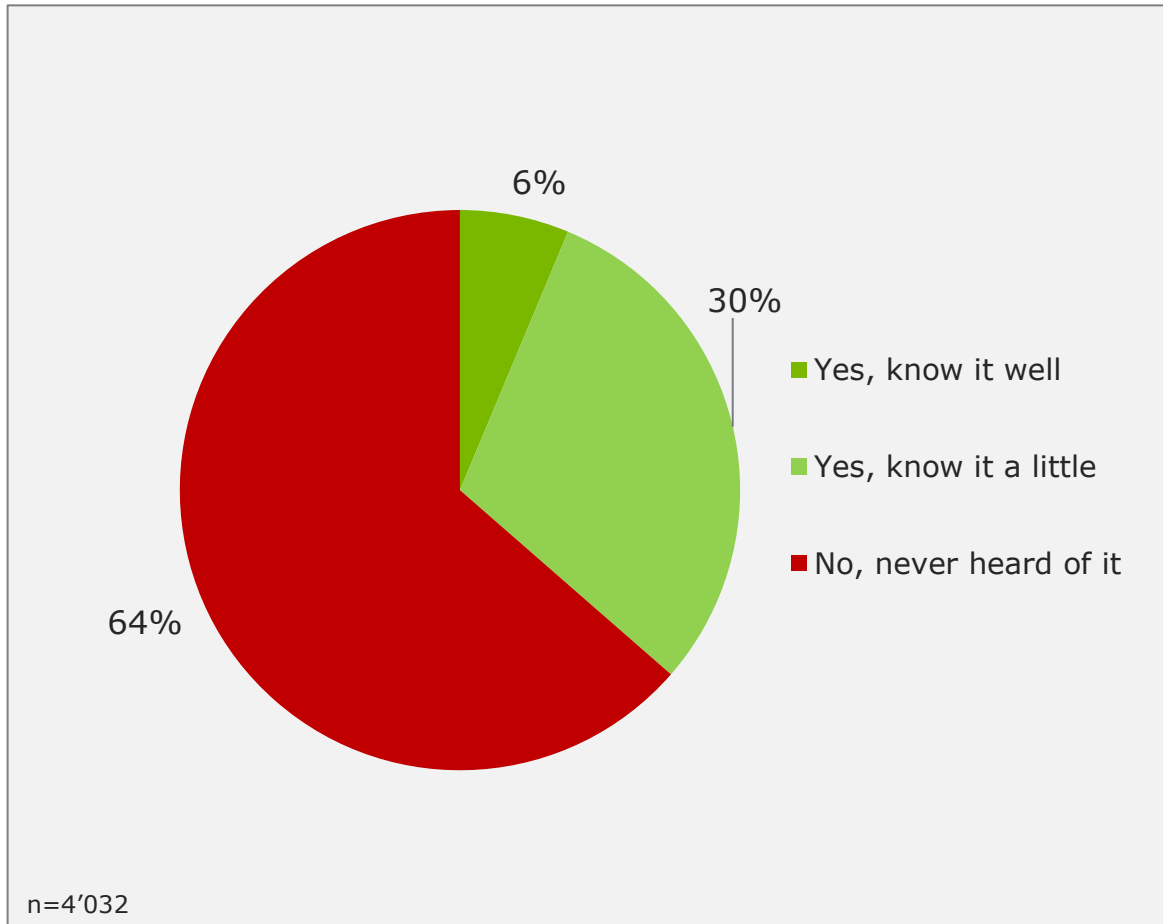
**Age of currently owned HAs (Mean):  
2024: 3.1 years**

Type of HA

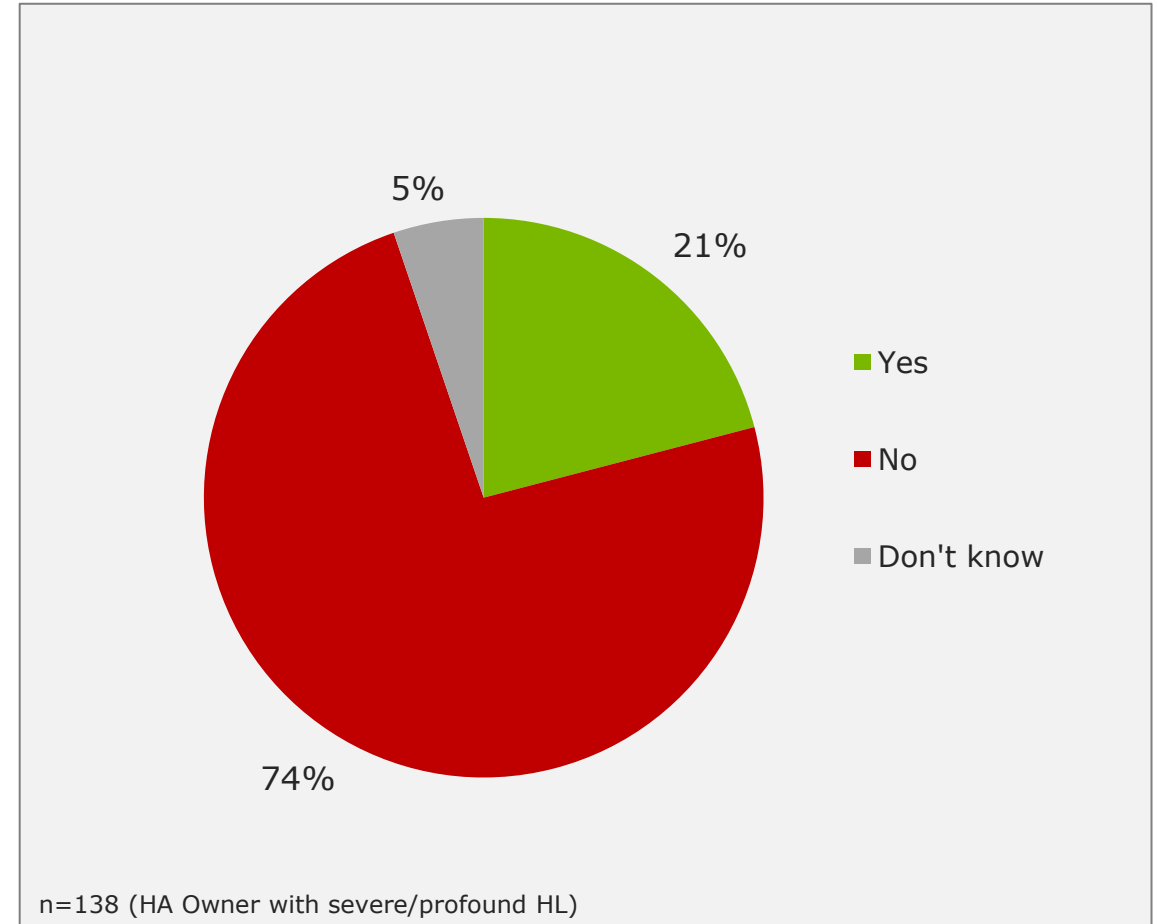


**64% of the population in POR have never heard of Cochlear Implants.  
21% of the HA owners with severe/profound HL have been informed about CIs by a medical professional**

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



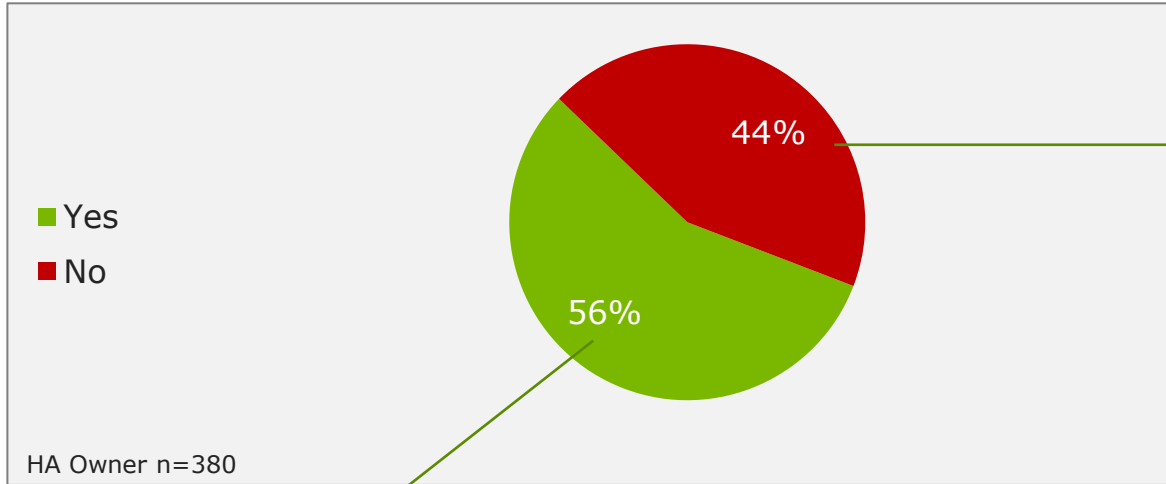
Have you been informed about cochlear implants by a medical professional?





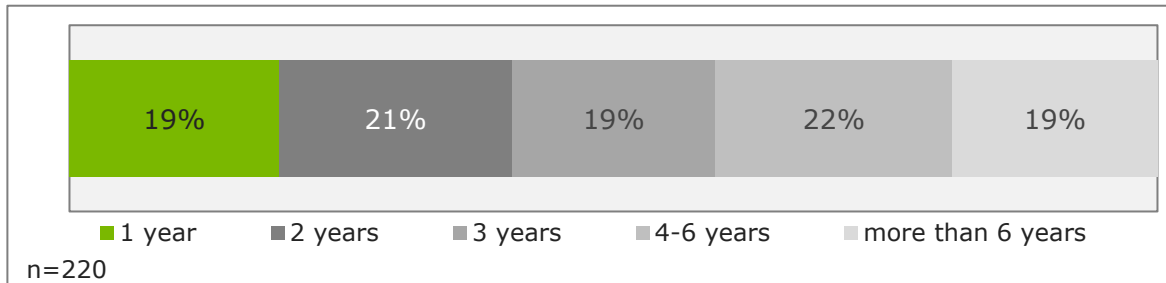
# Hearing aids are used for five years before they are replaced. Mostly below three years pass between becoming aware of the hearing loss and purchasing hearing aids

Current HAs = first HAs?

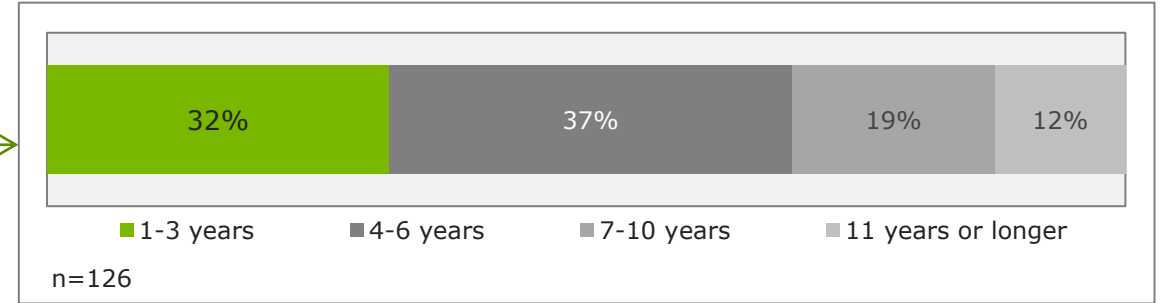


**HA Owner (1<sup>st</sup> HA):**

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



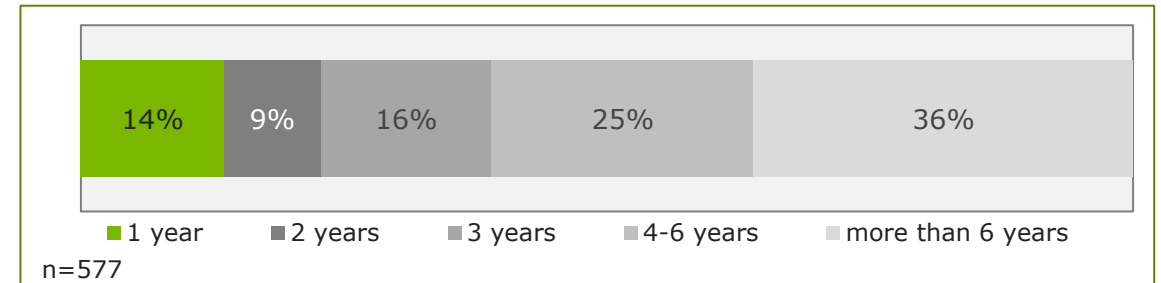
How many years did you own your previous HAs?



Age of HA before it has been replaced:  
2024: 5 years (median)

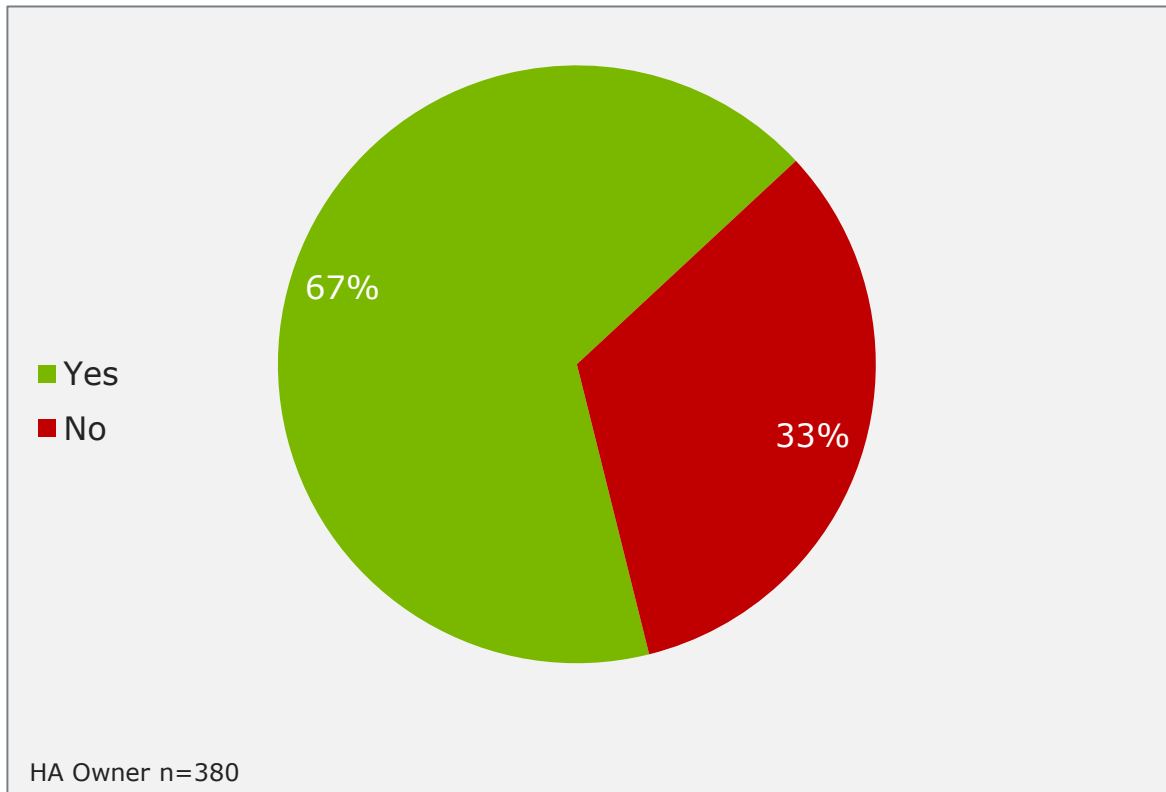
**HA Non-owner:**

How many years had passed since you became aware of your hearing loss?



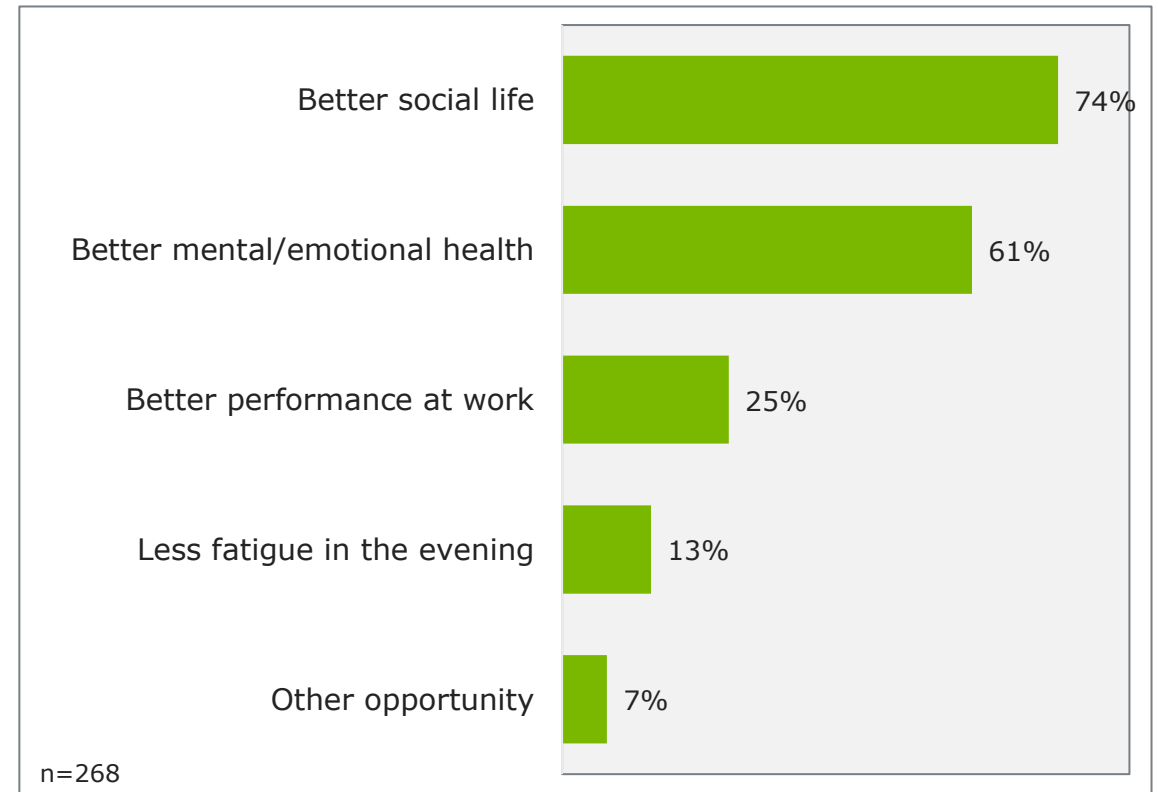
# 67% of all HA owners think they should have gotten their HAs sooner! The main reason is missing out on social life and mental/emotional health

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



*IF YES:*

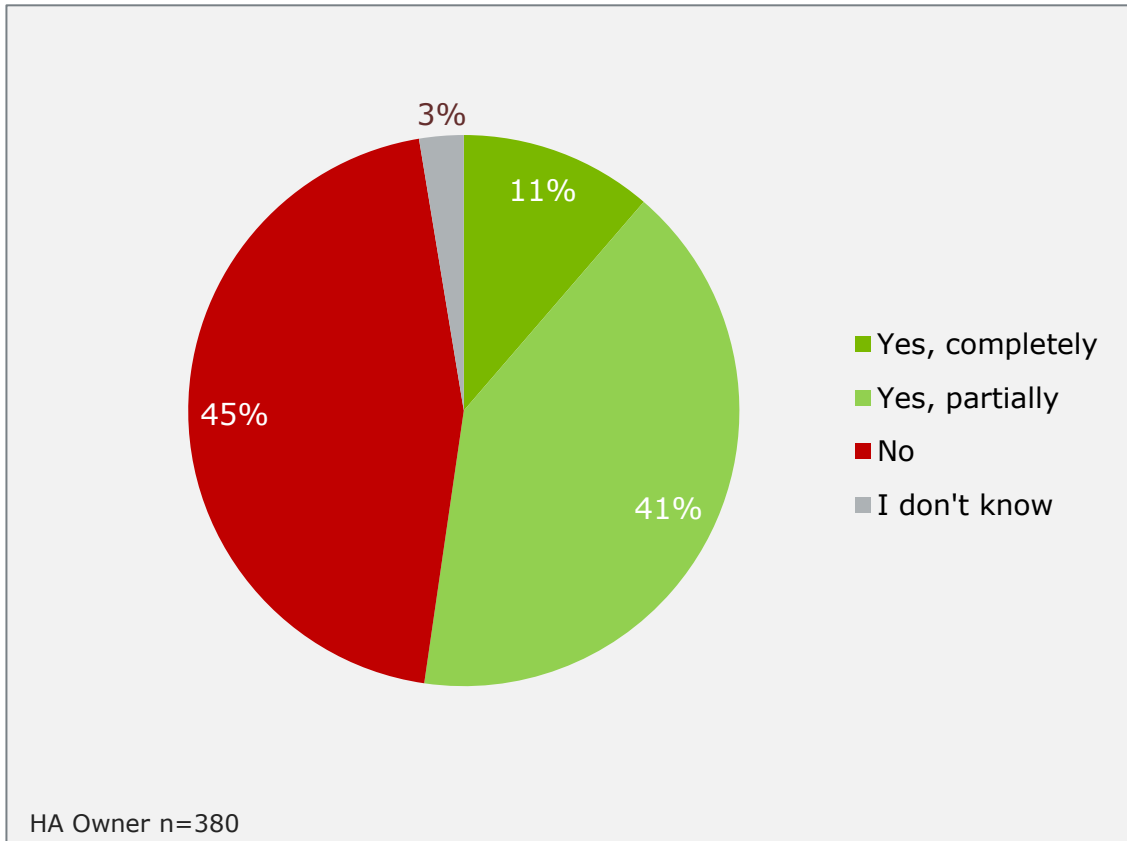
What are the reasons why you think you should have gotten your hearing aid(s) sooner? What are the opportunities you think you have missed because of this? Please tick all that apply.



**52% claimed some 3rd party reimbursement.  
Only 25% of the hearing impaired without hearing aids think that a third party would pay for any part of hearing aids**

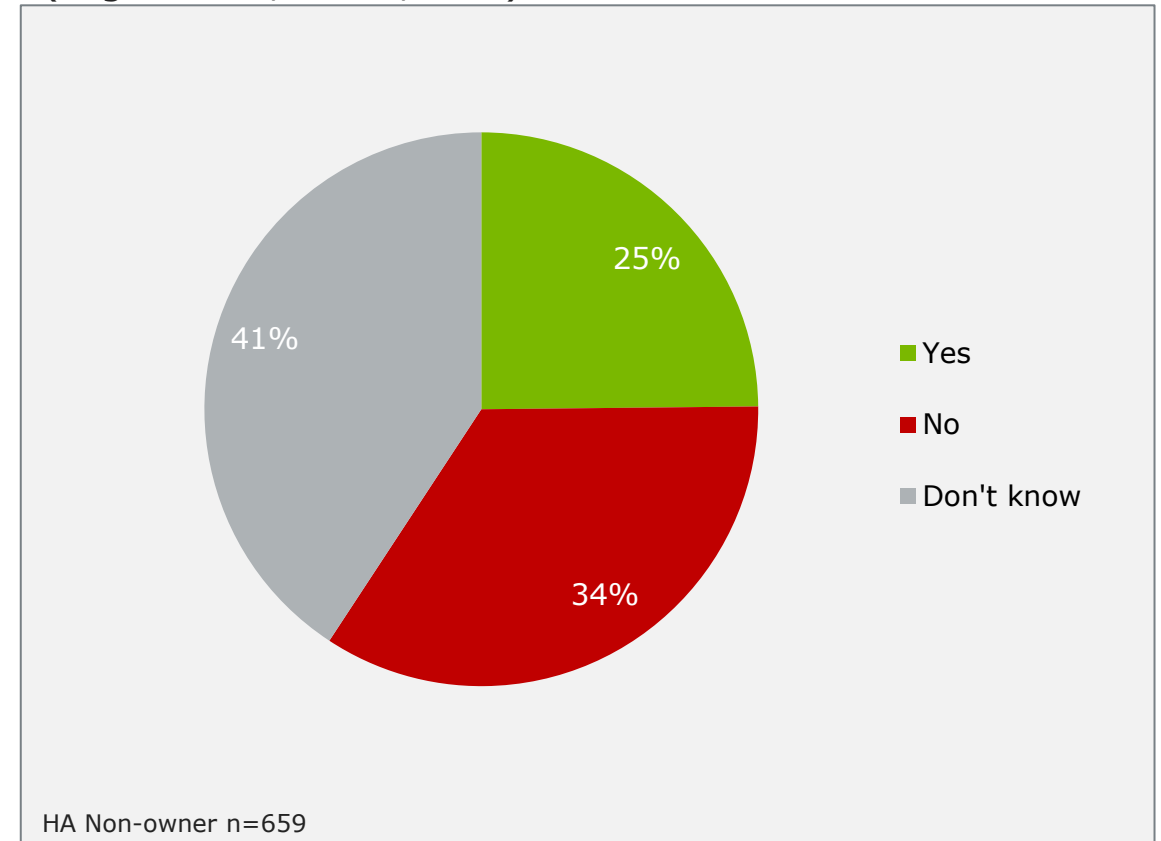
**HA Owner:**

Has your hearing aid been fully or partially paid for by a third party organization (seguradora, ADSE, SNS)?



**HA Non-owner:**

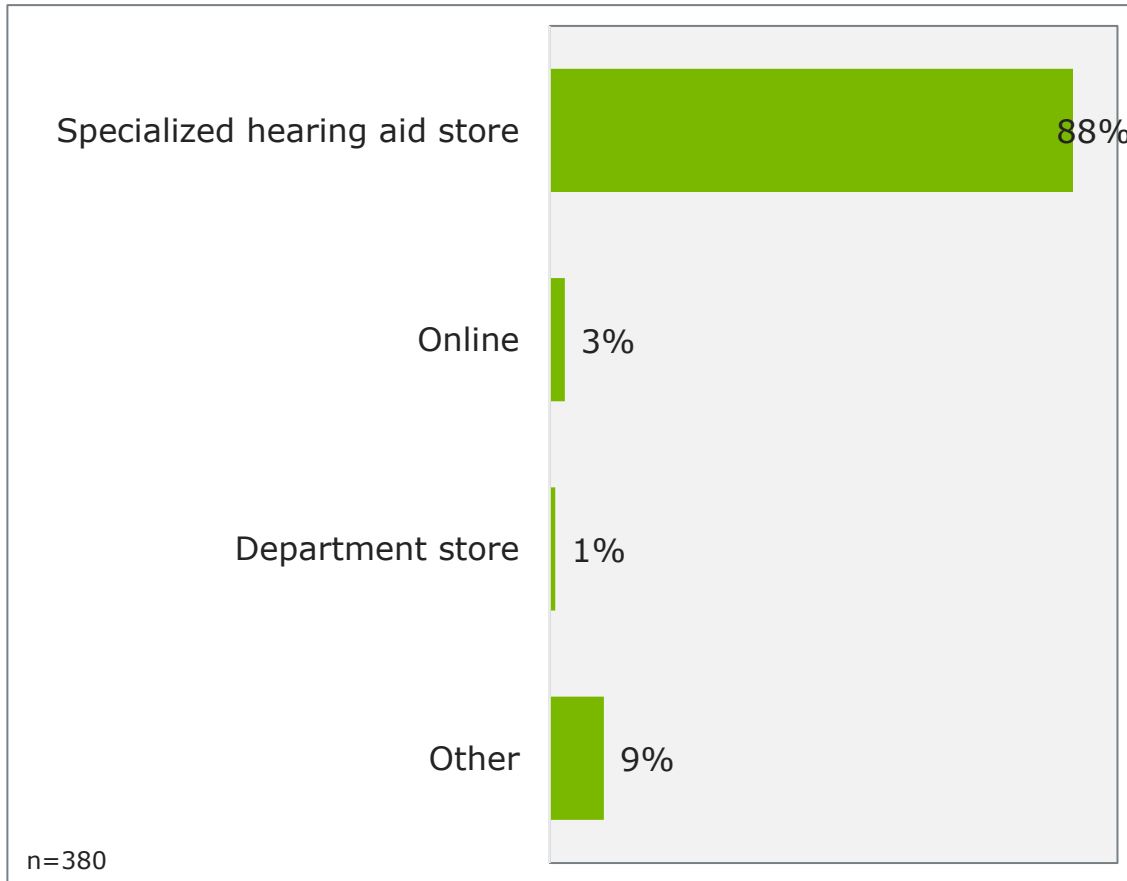
Based on your current knowledge, would any part or all of your hearing aid(s) be paid for by a third party (seguradora, ADSE, SNS)?



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

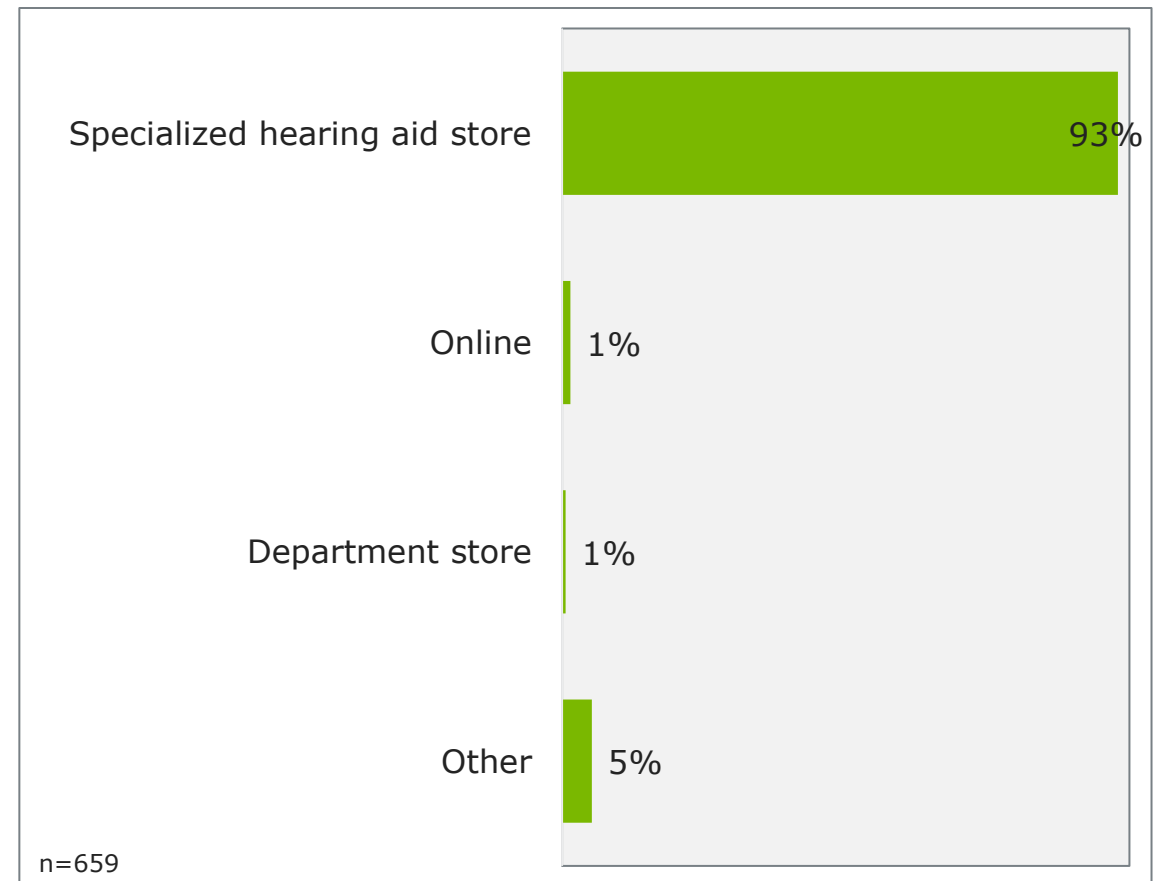
## HA Owner:

Where was your most current hearing aid obtained?



## HA Non-owner:

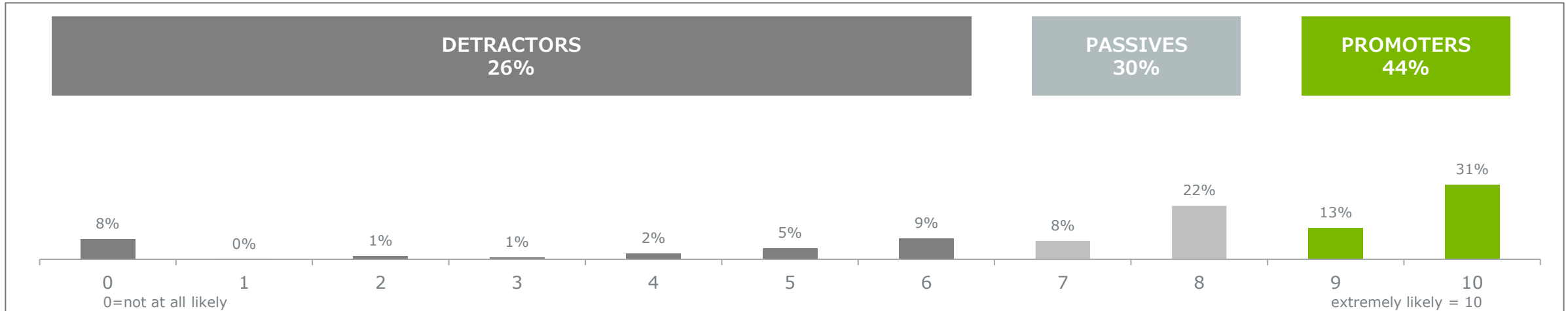
If you were to get hearing aids, where would you go?





# Recommendation intention of the place where the hearing aid(s) have been obtained: Positive NPS score of 18

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



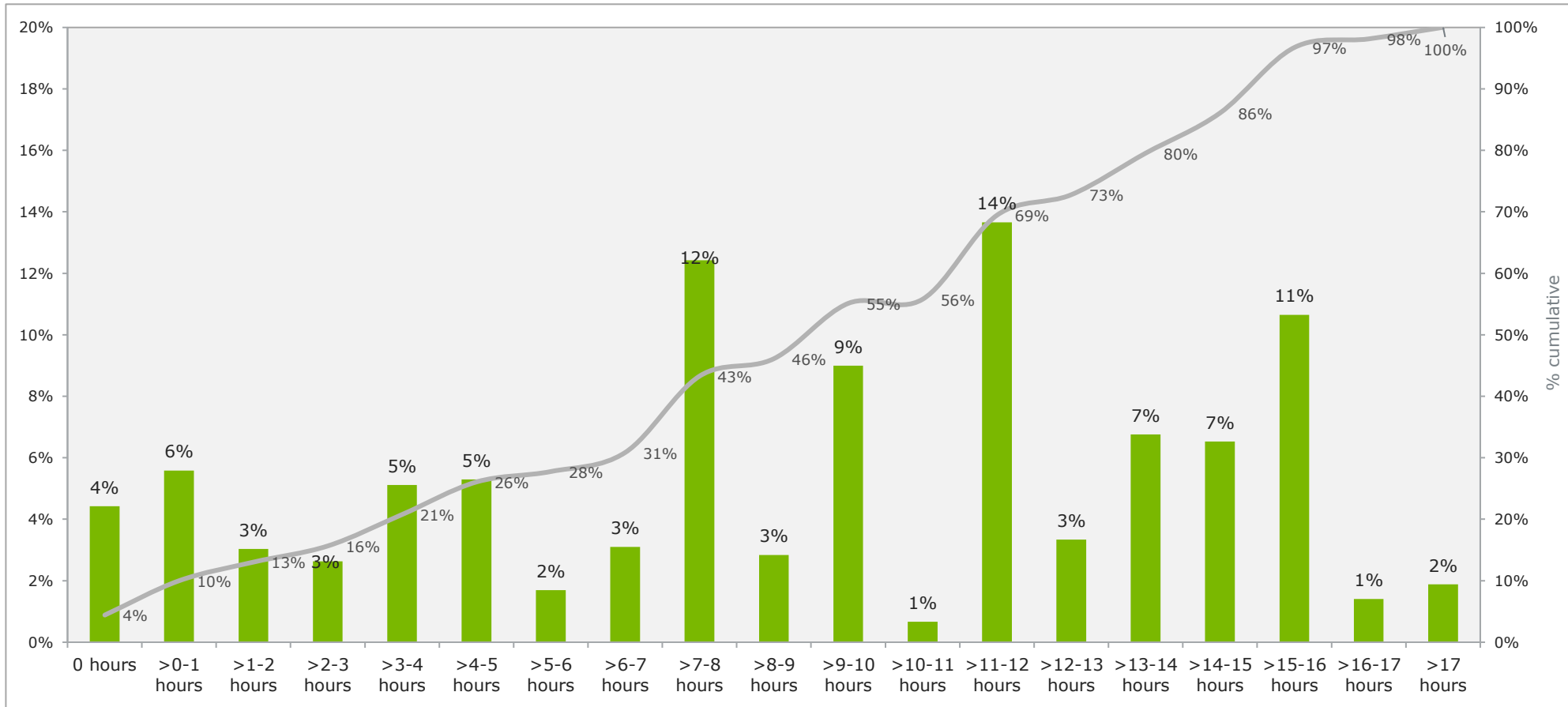
**NPS = PROMOTERS – DETRACTORS = 18** (exact figure rounded)





# On average, HAs are worn 9.5 hours a day

How many hours a day are HA worn?



**HA worn:**  
2024 Mean: 9.5 hours/day

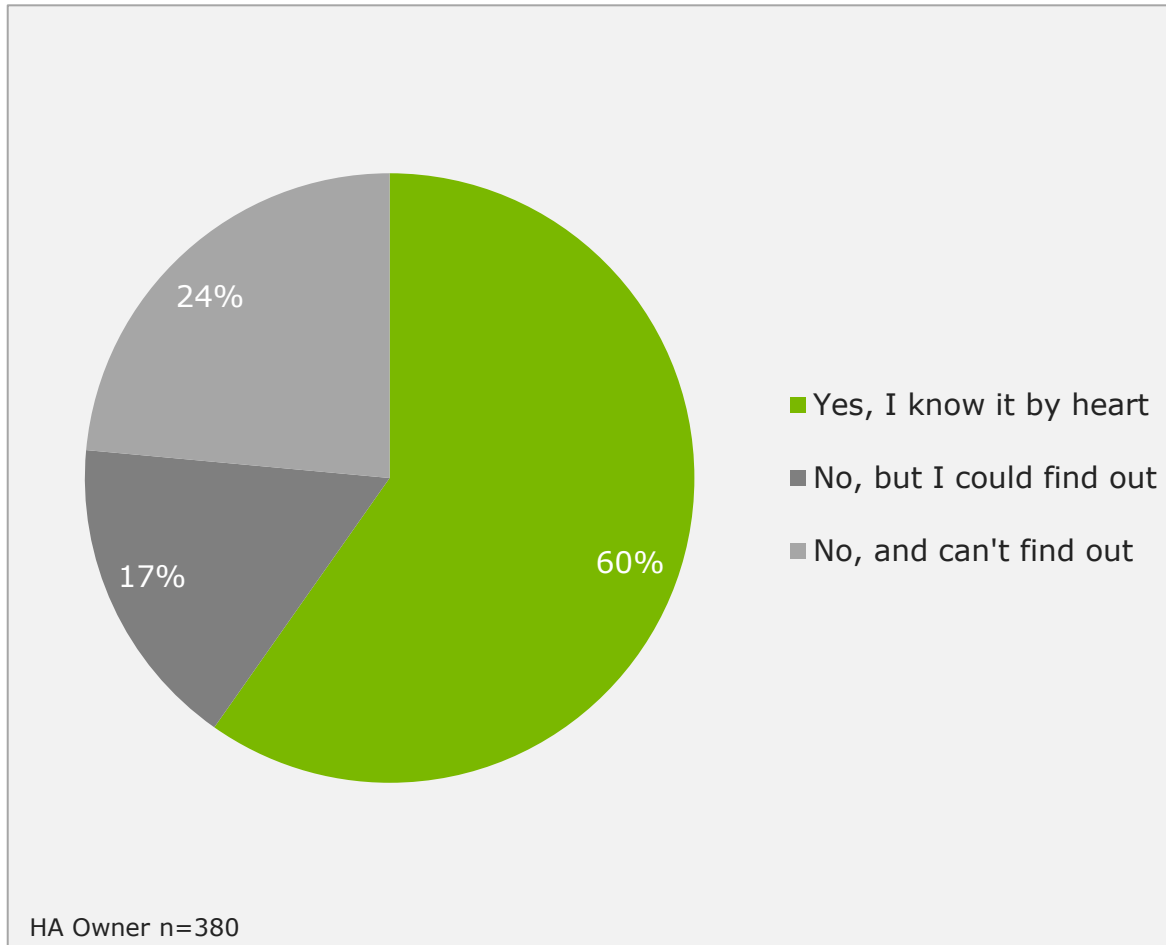
**In the drawer (0 hours):**  
2024: 4%

HA Owner n=380



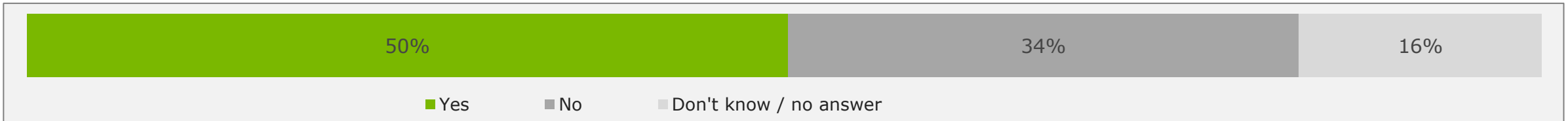
# 60% of today's hearing aid owners are aware of their hearing aid brand

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



# 21% of the HA owners use a hearing aid app, and 76% are satisfied with it

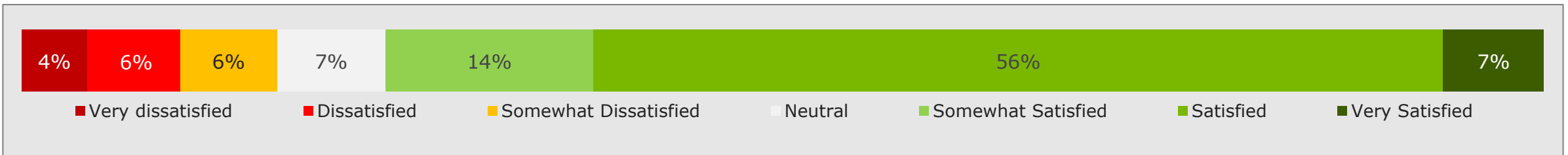
Have you been informed by your hearing care professional about hearing aid apps?  
(HA Owner n=380)



Do you personally use apps for your hearing aids?  
(HA Owner n=380)



IF APPS USED (n=120):  
Overall, how satisfied with the performance of your apps?

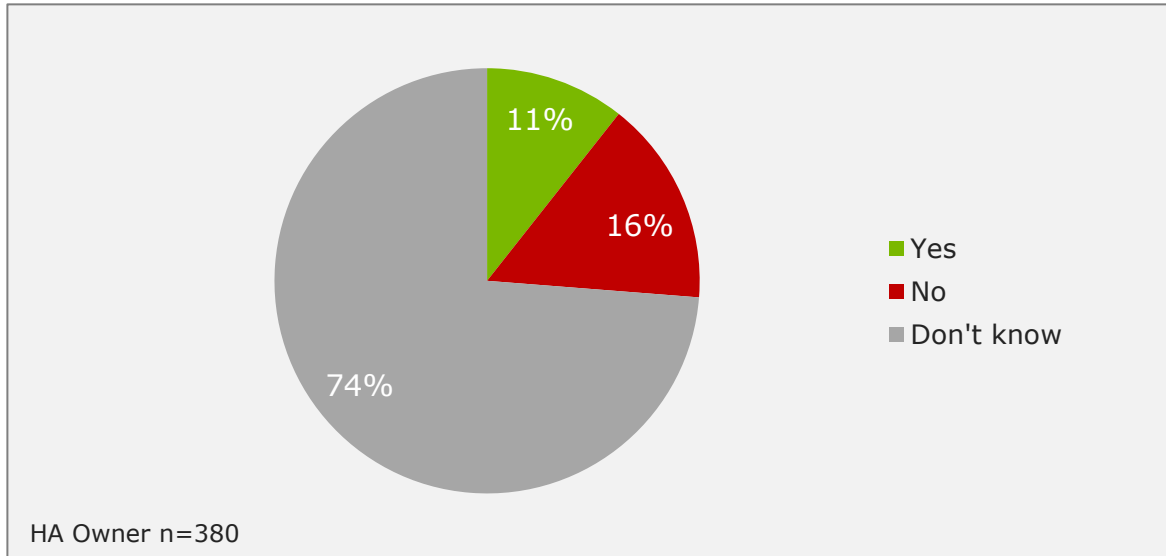




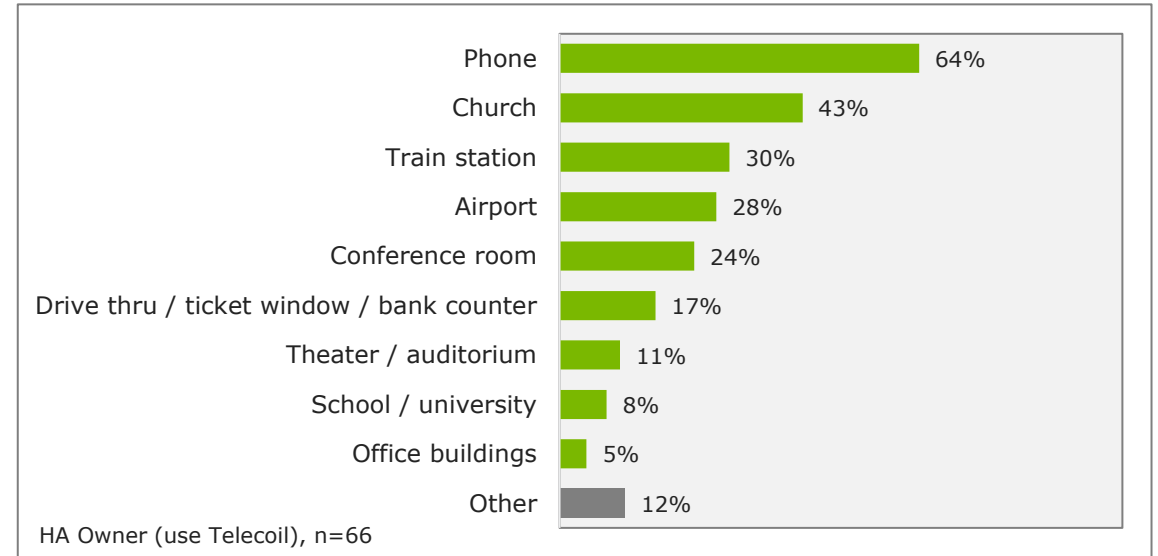


# 11% of the HAs are (to the knowledge of the owners) equipped with Telecoil – the main usage of Telecoil is in the phone

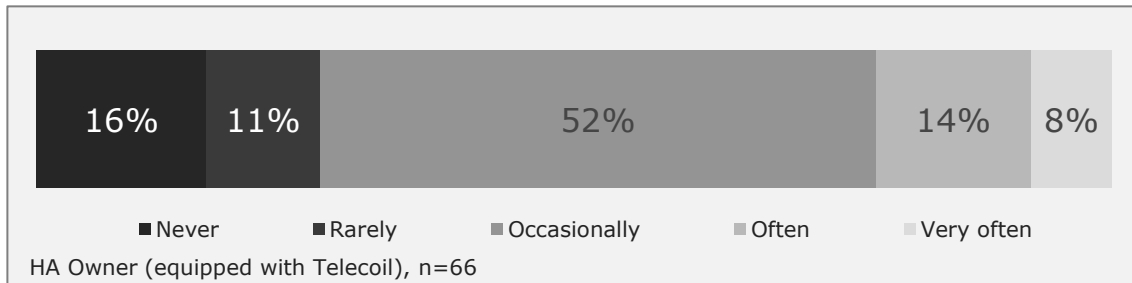
Are your hearing aids equipped with Telecoil?



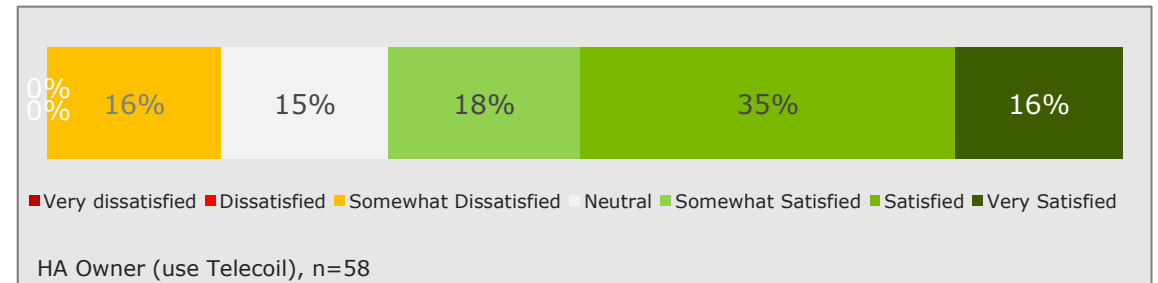
Where do you use your telecoil to improve your hearing?



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



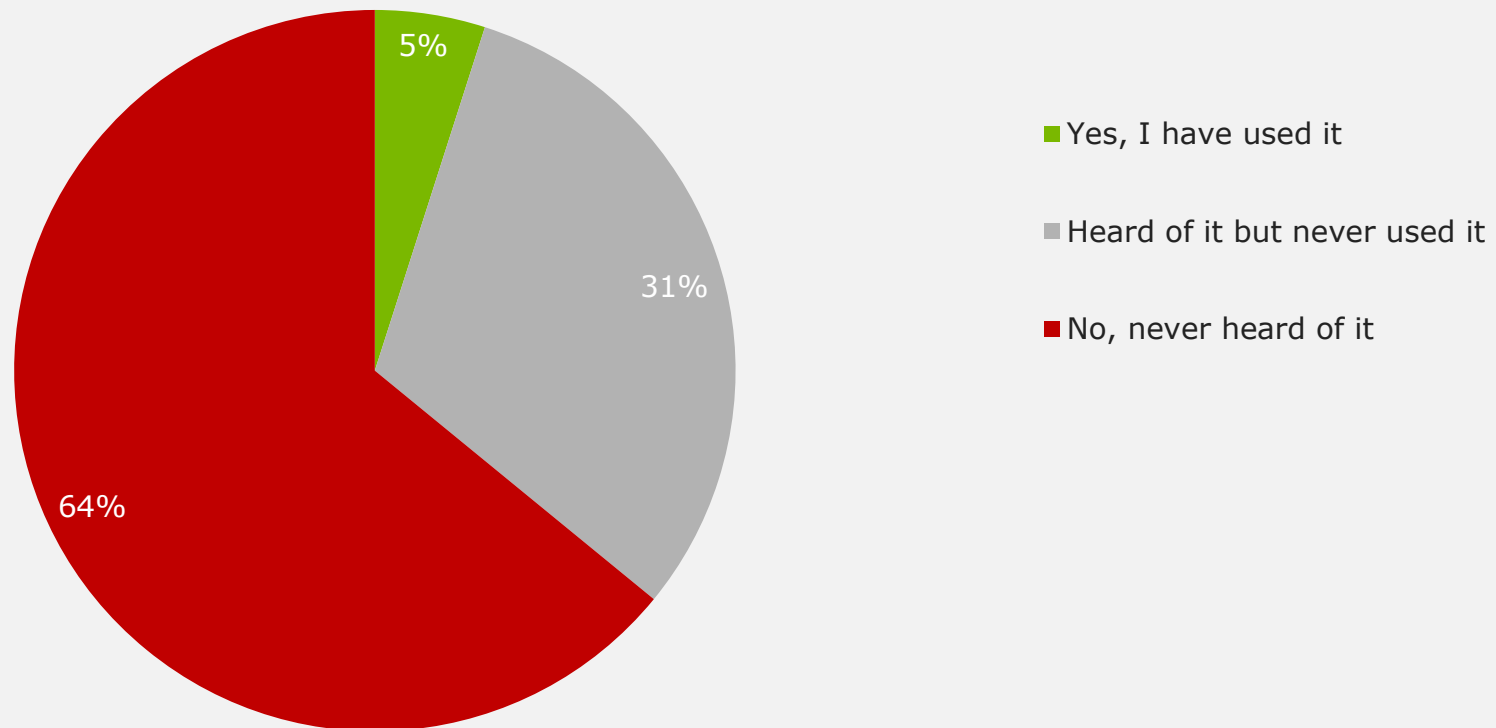
How satisfied are you with the telecoil option?



# 5% of the HA owners have already used remote fitting, 31% have at least heard of it, and 64% have never heard of it

Have you ever heard of Remote fitting for your hearing aids?

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



HA Owner n=380



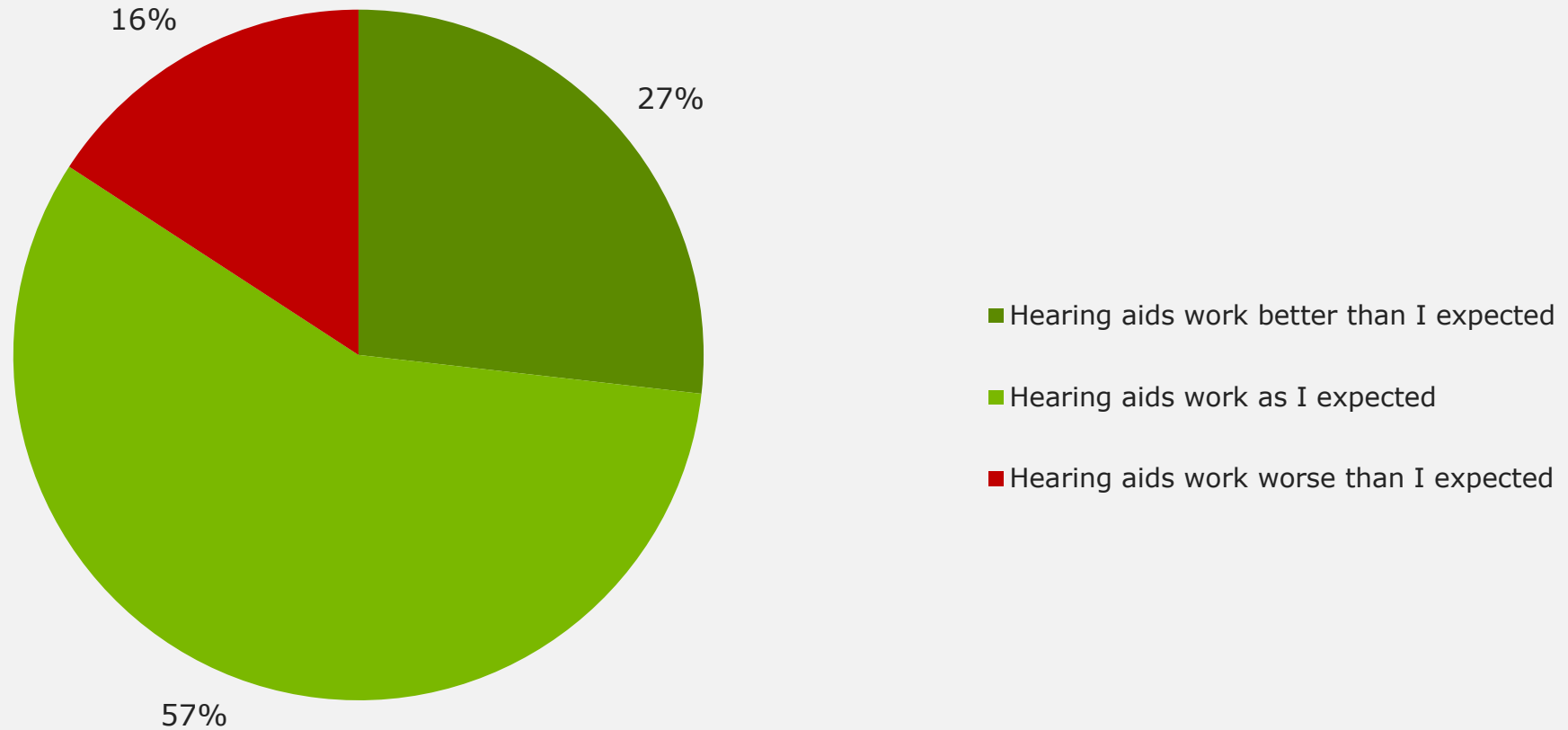


# Satisfaction with hearing aids and drivers



# 84% 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?

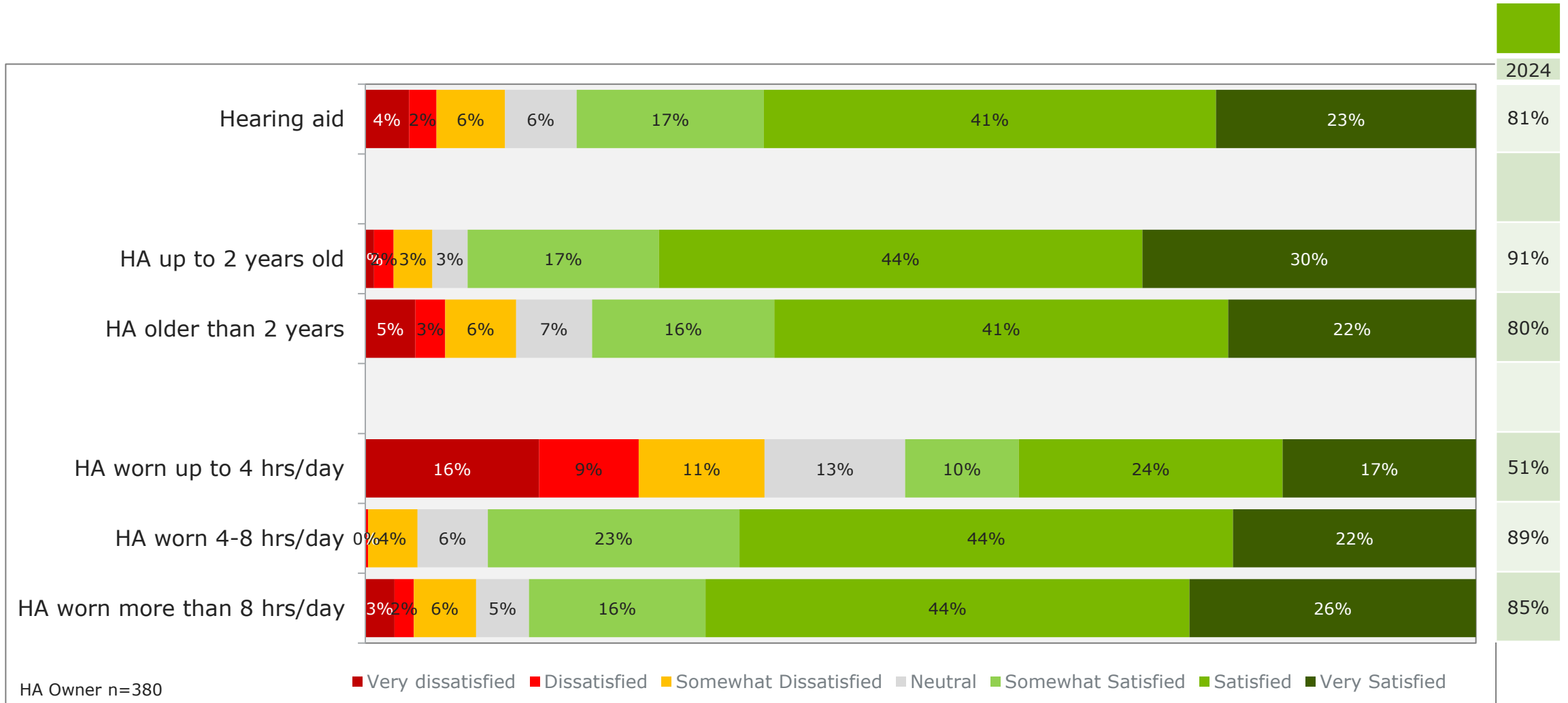


HA Owner n=380

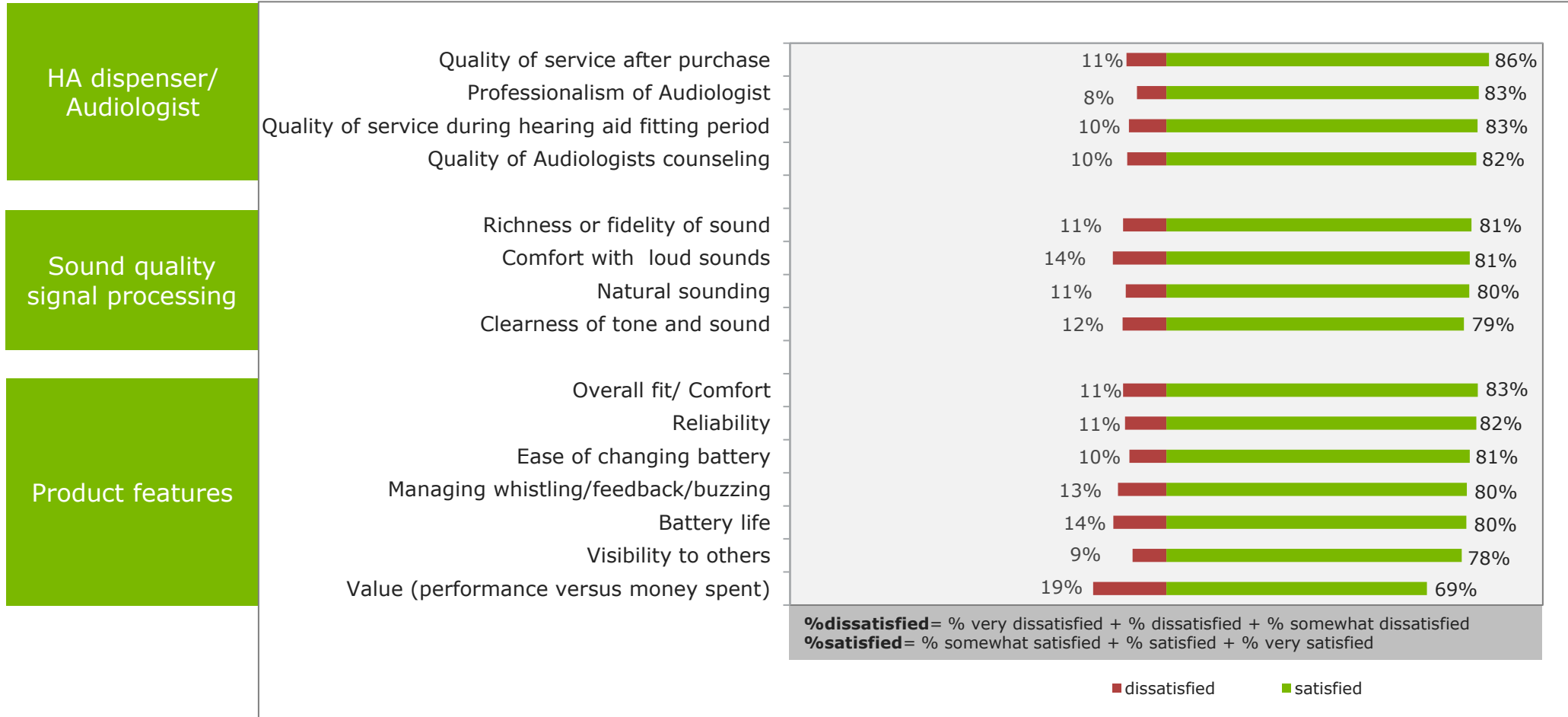




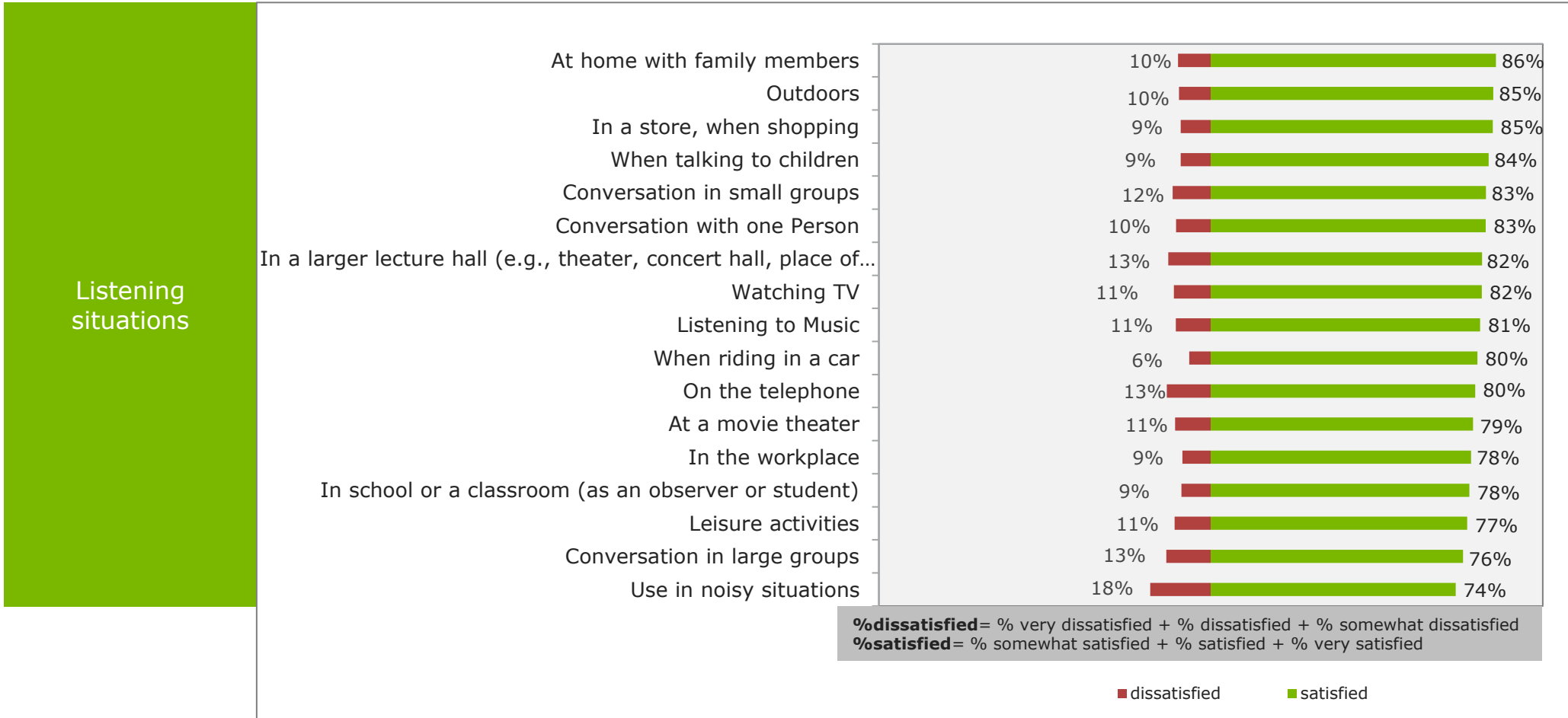
# Overall satisfaction with HA: 81% of hearing aid owners are satisfied with their hearing aid(s)



# Satisfaction with current hearing aids



# Satisfaction with current hearing aids



# Factors influencing satisfaction with current HA: Clearness of tone and sound is most important for overall satisfaction with HA

|                                 |  | Influence on overall satisfaction with HA* |
|---------------------------------|--|--|
| HA dispenser / Audiologist      | Quality of service during hearing aid fitting period   | 0.73                                       |
|                                 | Quality of service after purchase                      | 0.72                                       |
|                                 | Quality of HA dispensers / Audiologists counseling     | 0.71                                       |
|                                 | Professionalism of Hearing aid dispenser / Audiologist | 0.71                                       |
| Sound quality signal processing | Clearness of tone and sound                            | 0.86                                       |
|                                 | Richness or fidelity of sound                          | 0.83                                       |
|                                 | Natural sounding                                       | 0.78                                       |
|                                 | Comfort with loud sounds                               | 0.76                                       |
| Product features                | Overall fit/ Comfort                                   | 0.74                                       |
|                                 | Reliability  | 0.72                                       |
|                                 | Managing whistling/feedback/buzzing                    | 0.70                                       |
|                                 | Visibility to others                                   | 0.66                                       |
|                                 | Value (performance versus money spent)                 | 0.66                                       |
|                                 | Battery life   | 0.59                                       |
|                                 | Ease of changing battery                               | 0.59                                       |

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

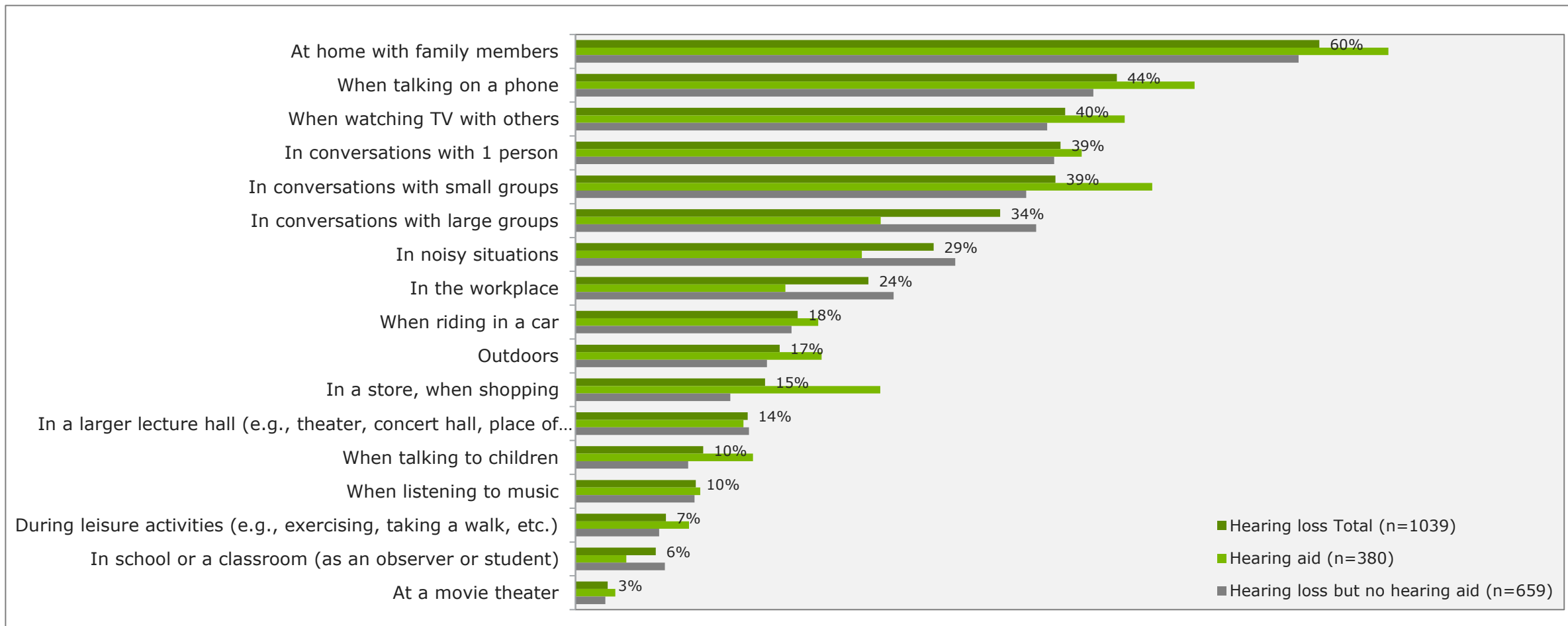






# Talking at home with family members, talking on a phone and watching TV with others are the most frequent important listening situations

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





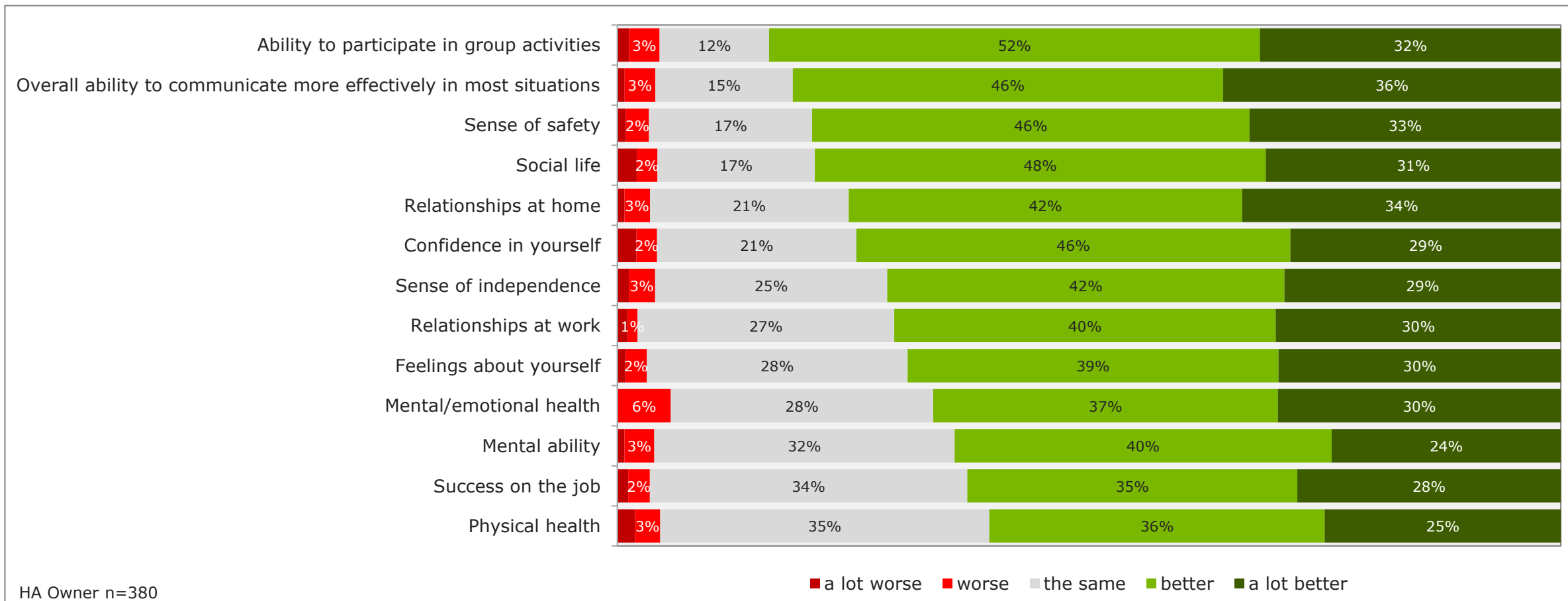
# Positive impact of hearing aids, quality of life





# There is a significant positive impact of HAs on different aspects: Ability to participate in group activities, communication effectiveness, sense of safety and social life improved

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



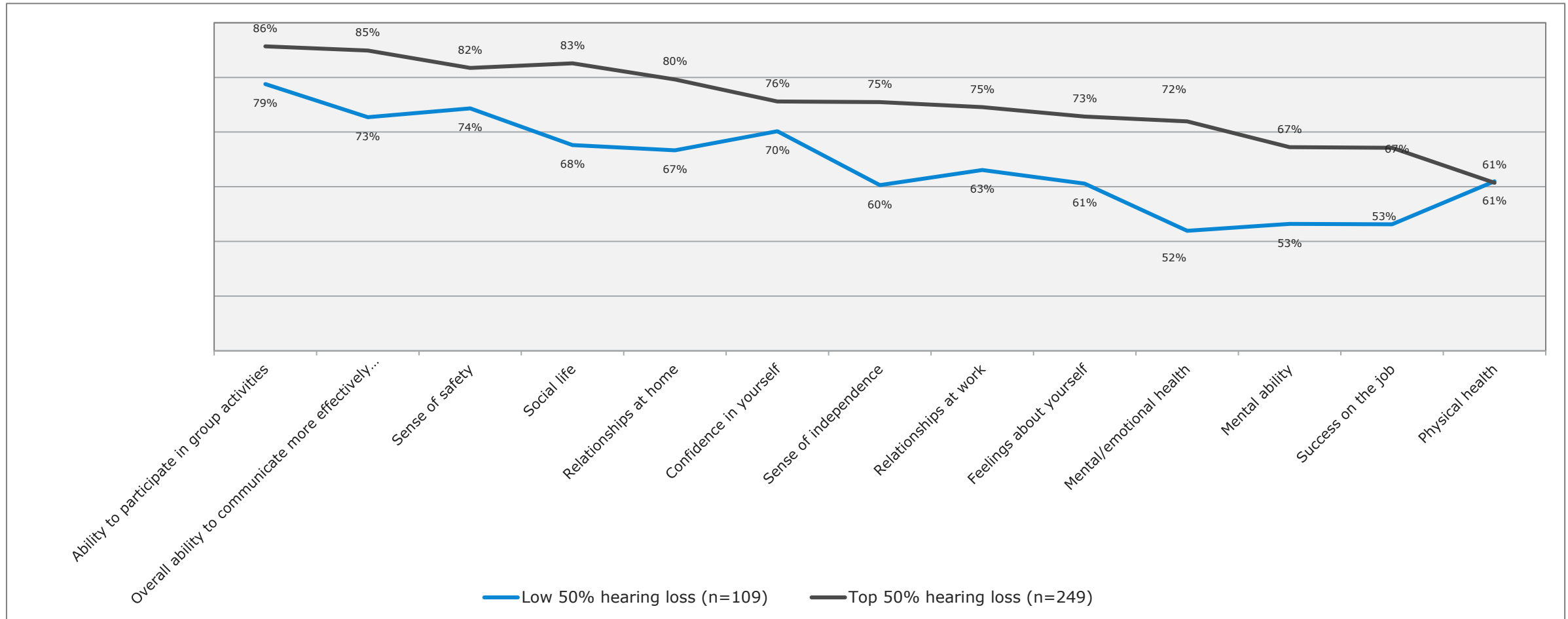
HA Owner n=380





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

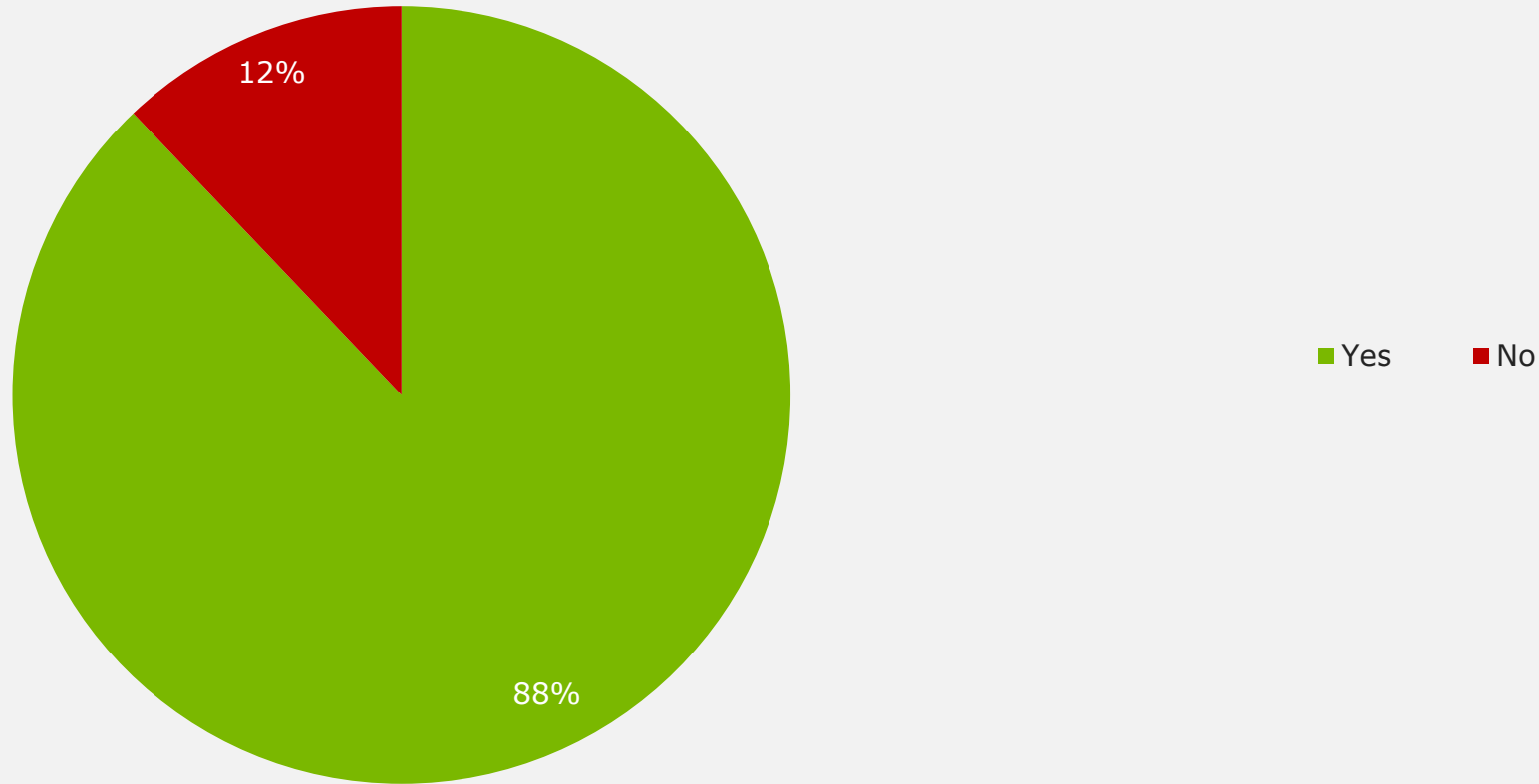
% of HA Owners feeling better/a lot better





# 88% 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?



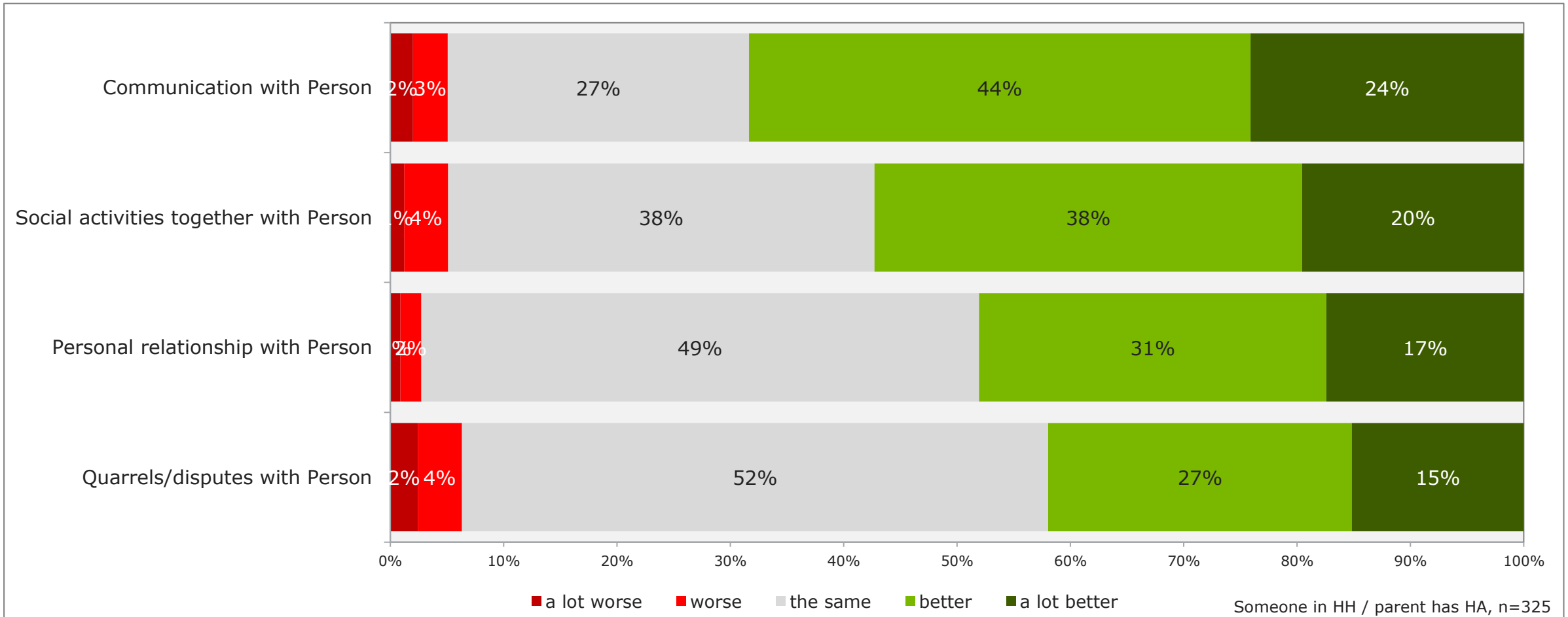
HA Owner n=380





# Also for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids

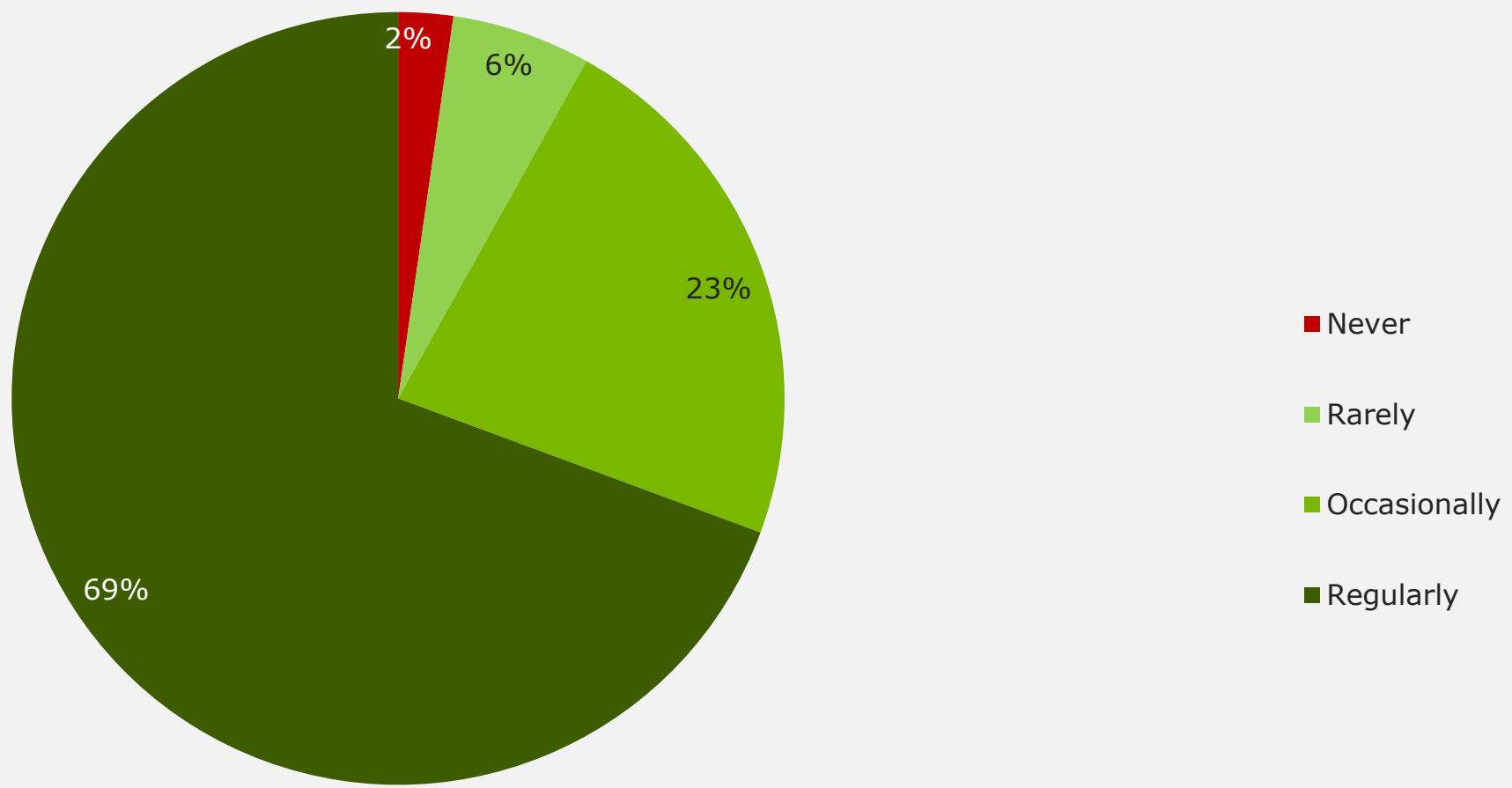
How did the following aspects change since person X is wearing hearing aids?





# 98% 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=380





# 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<br>n=380 | HA Non-owner low 50% HL<br>n=347 | HA Non-owner Top 50% HL<br>n=209 |
|-------------------------------|-------------------|----------------------------------|----------------------------------|
| <b>Ears impaired (stated)</b> |                   |                                  |                                  |
| Unilateral loss               | 22%               | 43%                              | 19%                              |
| Bilateral loss                | 78%               | 57%                              | 81%                              |
| <b>Perceived loss</b>         |                   |                                  |                                  |
| Mild                          | 6%                | 52%                              | 9%                               |
| Moderate                      | 44%               | 40%                              | 57%                              |
| Severe                        | 40%               | 6%                               | 30%                              |
| Profound                      | 10%               | 3%                               | 4%                               |

← More similar hearing loss-structure →



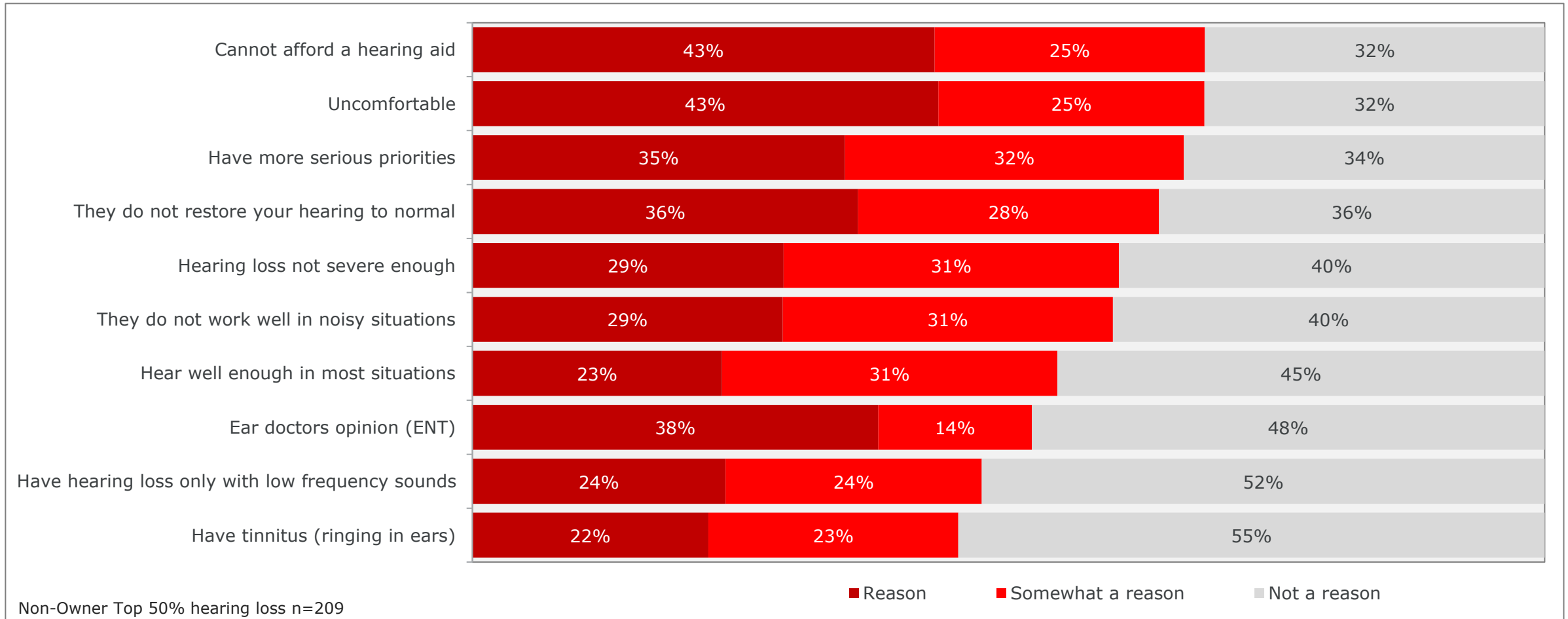


# Reasons for not having hearing aids





# Top 10 reasons for not having a hearing aid

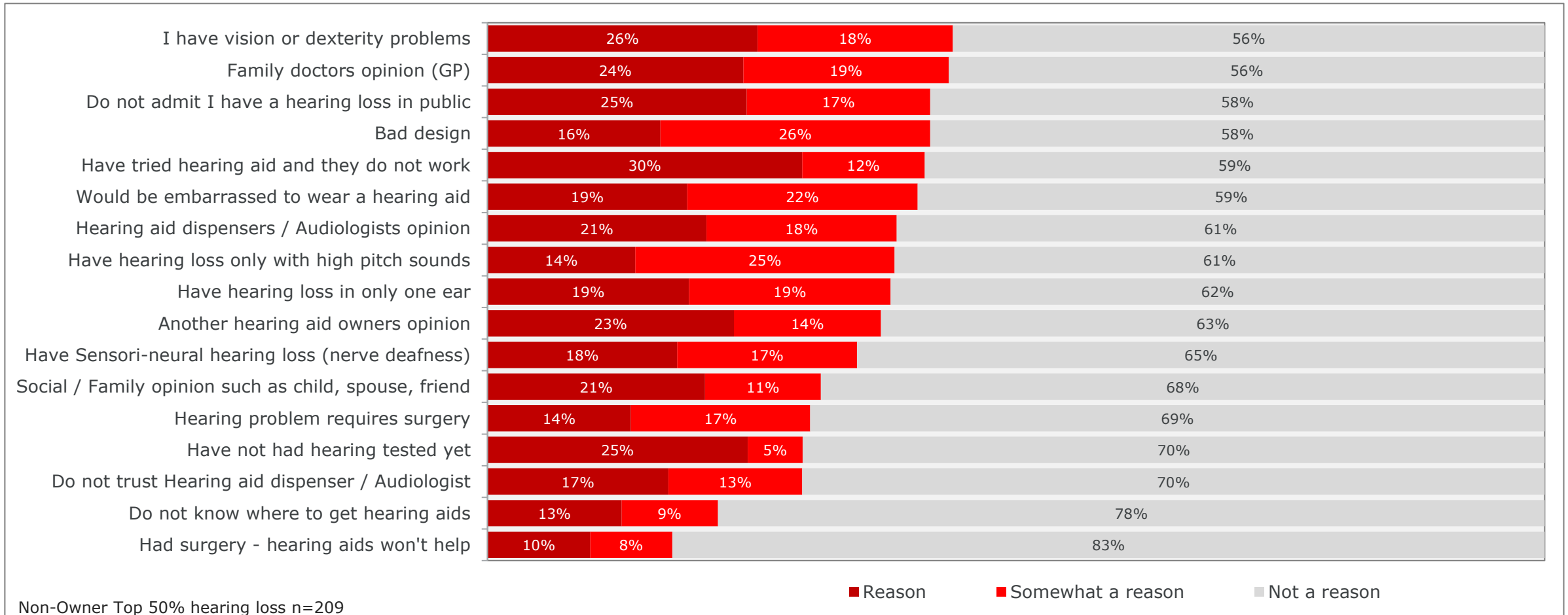


Non-Owner Top 50% hearing loss n=209





# Less important reasons for not having a hearing aid

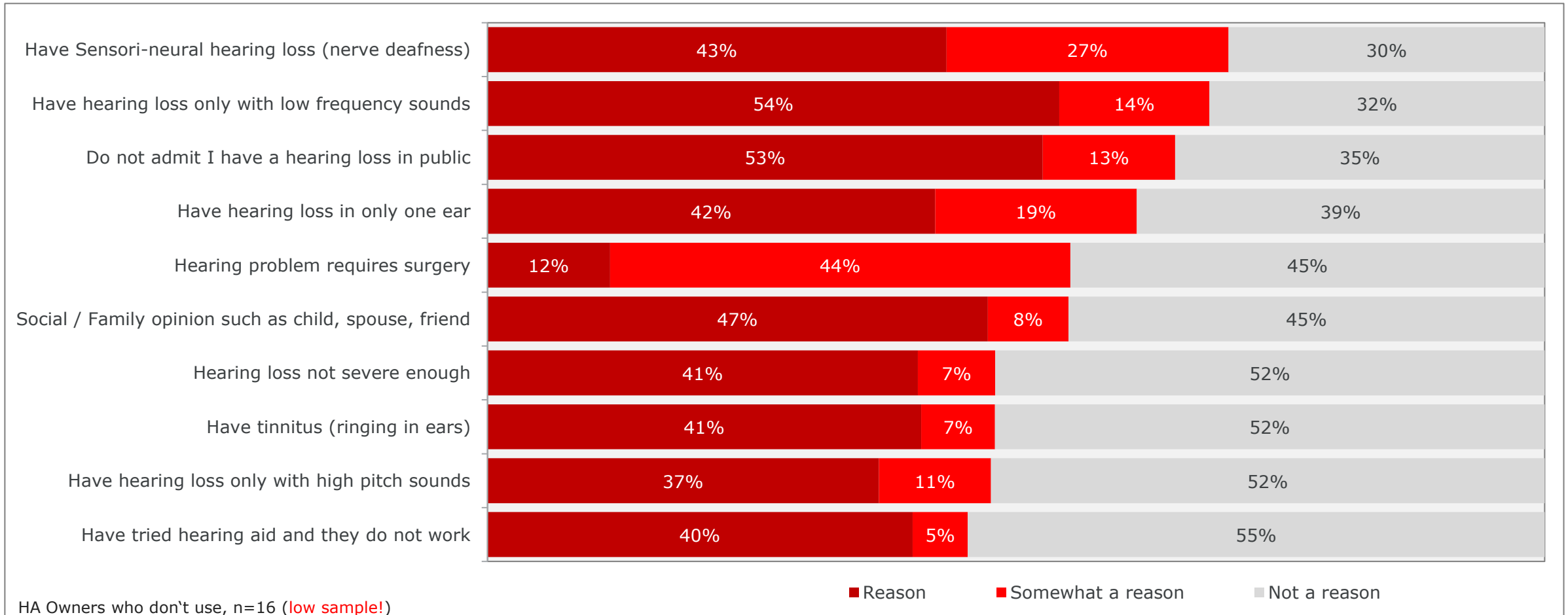


Non-Owner Top 50% hearing loss n=209





# Top 10 reasons for HA owners NOT using them



HA Owners who don't use, n=16 (low sample!)





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

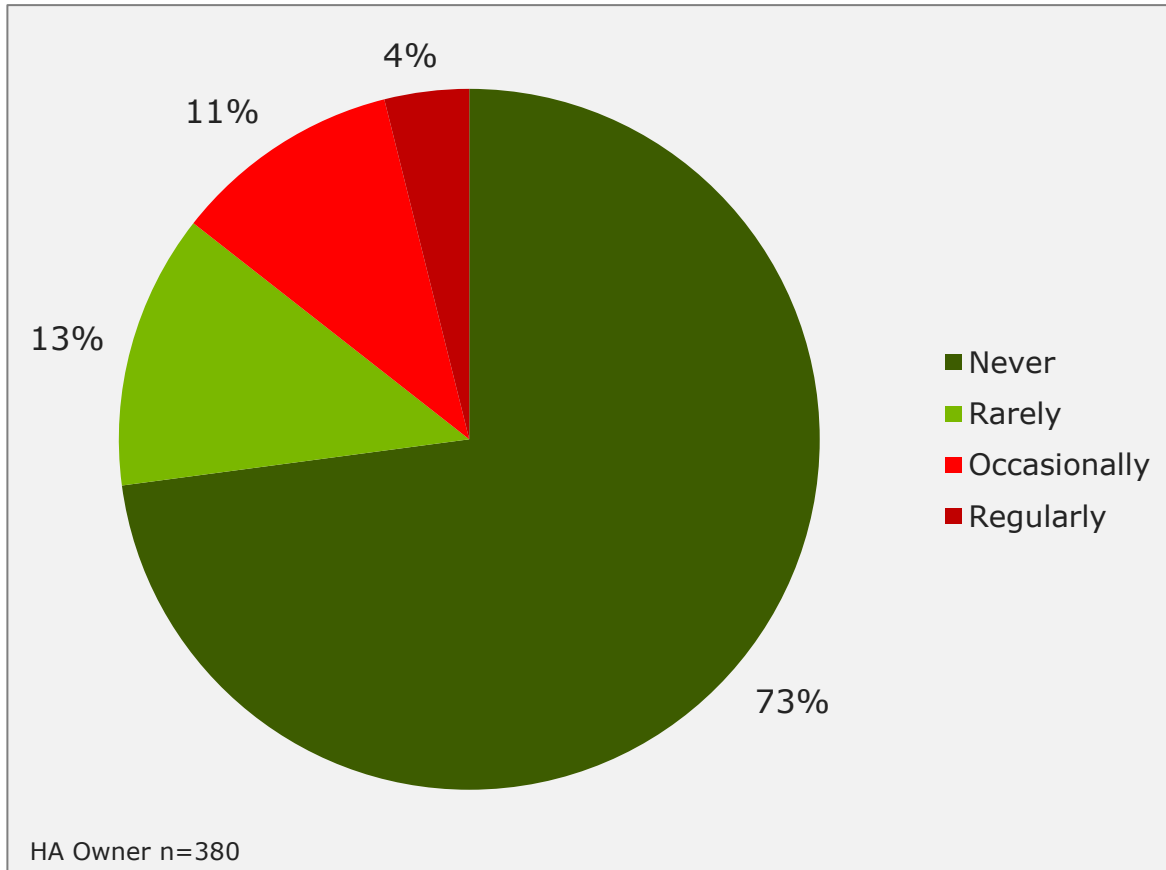




**73% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely that somebody makes fun of or rejects a hearing impaired without a hearing aid**

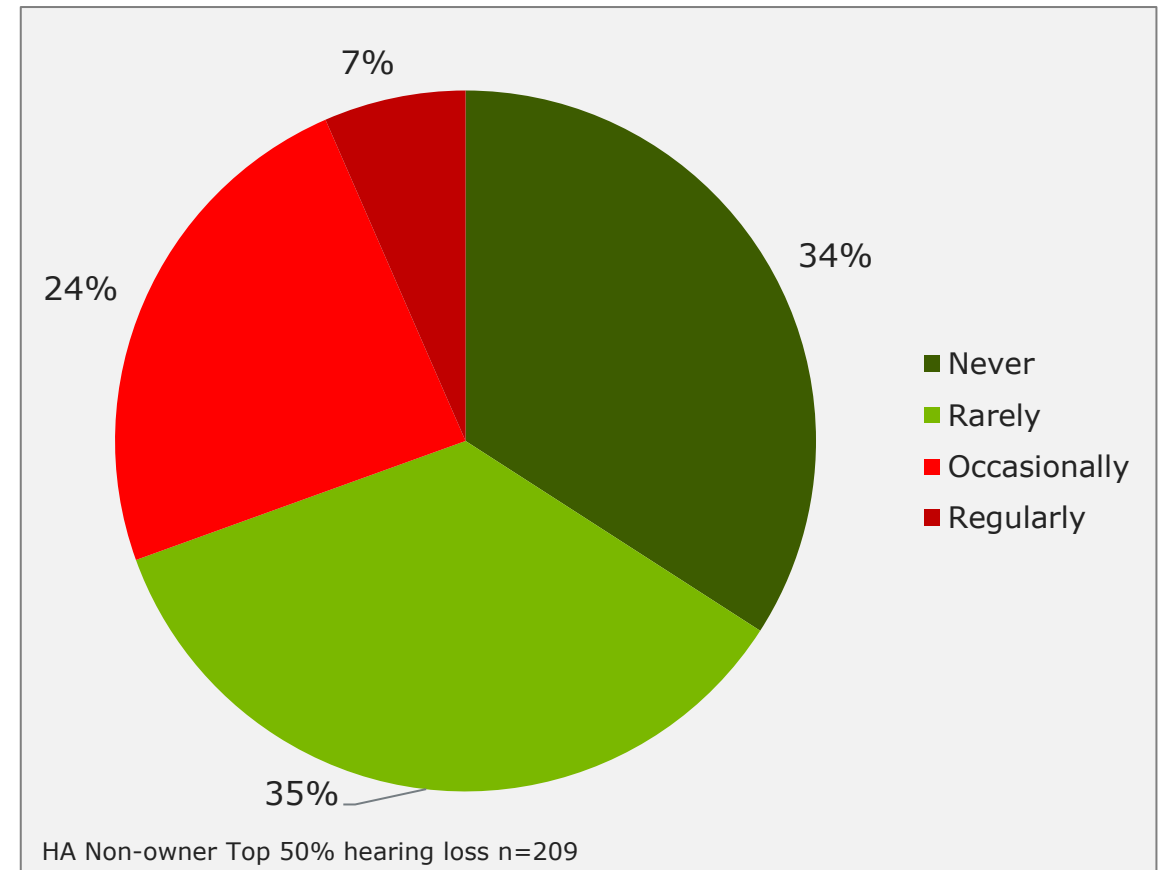
**HA Owner:**

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



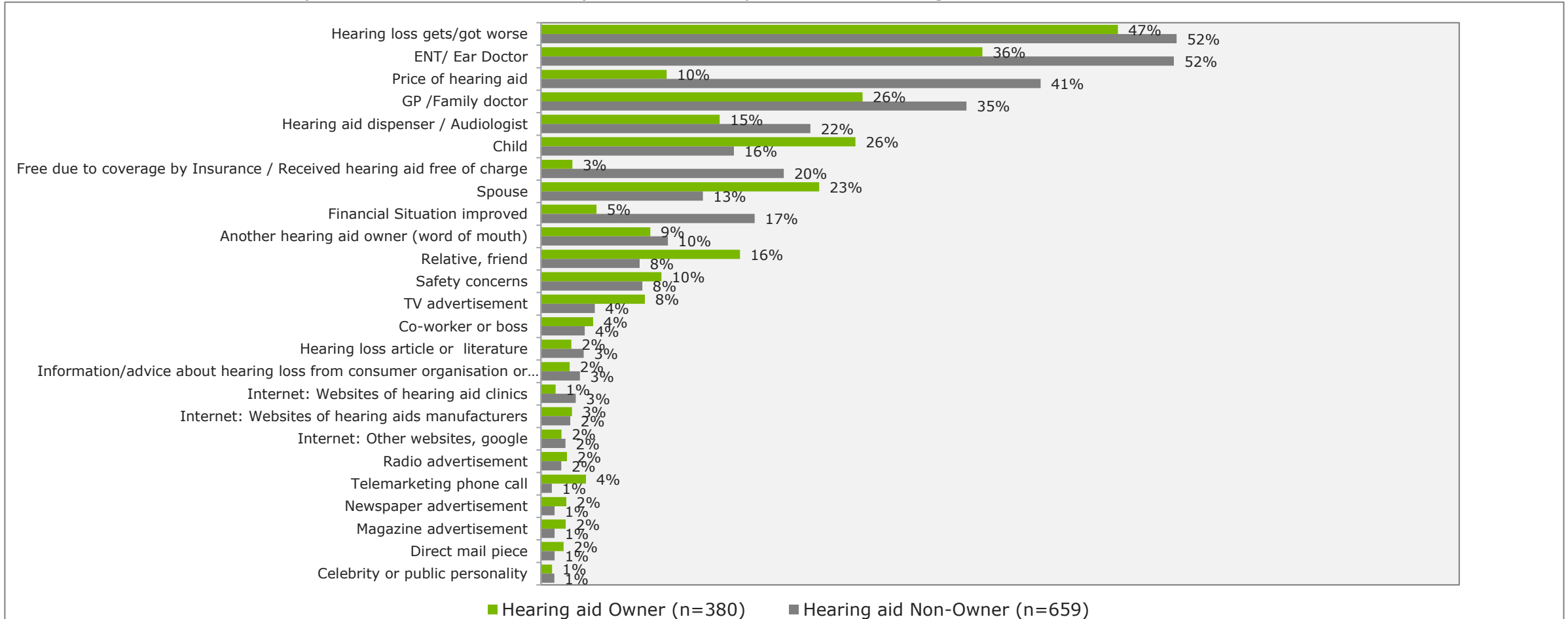




The most important influencing factors for HA owners were worsening hearing loss, ENT, GP, child, spouse, and an audiologist. For the Non-owners, financial aspects play a crucial role (price, insurance coverage)

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

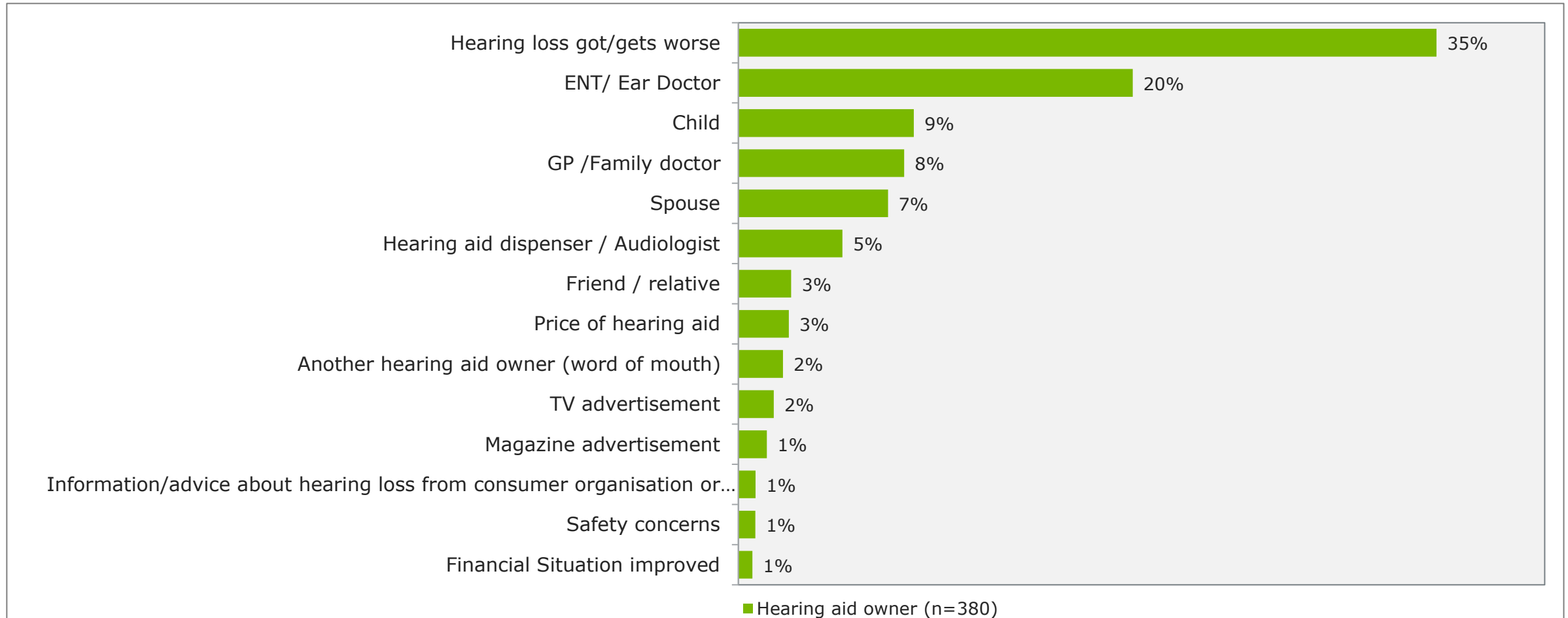
**HA Non-owner:** What do you think would influence you to obtain / purchase a hearing aid ?





# The most crucial trigger to buy a hearing aid is worsening hearing loss, followed by the ENT

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



# Provided by:



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# APPENDIX



# Demographics (1)

## Hearing instrument adoption rates and populations

|                                | Count | Hearing difficulty | Hearing aid adoption rate %<br>(Base=Hearing impaired) | No hearing loss | Hearing loss but no hearing aids<br>(HA Non-owner) | Hearing aids (HA Owner) |
|--------------------------------|-------|--------------------|--|-----------------|--|-------------------------|
| <b>Gender</b>                  |       |                    |  |                 |  |                         |
| Male                           | 7'212 | 9.7%               | 20.9%  | 47.6%           | 46.6%  | 40.9%                   |
| Female                         | 8'010 | 10.5%              | 25.0%  | 52.4%           | 53.4%  | 59.1%                   |
| <b>Age</b>                     |       |                    |  |                 |  |                         |
| 1 - 14                         | 1'929 | 1.8%               | 16.1%  | 13.9%           | 2.4%   | 1.5%                    |
| 15 - 24                        | 1'643 | 1.8%               | 20.0%  | 11.8%           | 2.0%   | 1.7%                    |
| 25 - 34                        | 1'685 | 3.2%               | 14.8%  | 11.9%           | 3.8%   | 2.2%                    |
| 35 - 44                        | 2'009 | 4.1%               | 7.7%   | 14.1%           | 6.5%   | 1.8%                    |
| 45 - 54                        | 2'484 | 7.8%               | 13.1%  | 16.7%           | 14.3%  | 7.1%                    |
| 55 - 64                        | 2'075 | 11.8%              | 18.9%  | 13.4%           | 16.7%  | 13.0%                   |
| 65 - 74                        | 1'746 | 17.2%              | 24.4%  | 10.6%           | 19.2%  | 20.5%                   |
| 74+                            | 1'651 | 36.4%              | 30.9%  | 7.7%            | 35.1%  | 52.2%                   |
| <b>Type of household</b>       |       |                    |  |                 |  |                         |
| single household               | 1'479 | 19.8%              | 25.1%  | 8.7%            | 18.5%  | 20.7%                   |
| Couple, no kids                | 2'823 | 14.4%              | 26.1%  | 17.7%           | 25.3%  | 29.8%                   |
| Couple with kid(s)             | 8'568 | 6.5%               | 19.0%  | 58.5%           | 38.3%  | 29.9%                   |
| Single mom/dad with kid(s)     | 1'172 | 8.2%               | 23.7%  | 7.9%            | 6.2%   | 6.4%                    |
| Retirement home, hospital etc. | 182   | 37.3%              | 20.6%  | 0.8%            | 4.6%   | 3.9%                    |
| Other                          | 997   | 11.7%              | 28.8%  | 6.4%            | 7.0%   | 9.4%                    |

# Demographics (2)

## Hearing instrument adoption rates and populations

|  | Count | Hearing difficulty | Hearing aid adoption rate %<br>(Base=Hearing impaired) | No hearing loss | Hearing loss but no hearing aids<br>(HA Non-owner) | Hearing aids (HA Owner) |
|--|-------|--------------------|--|-----------------|--|-------------------------|
| <b>Status</b>  |       |                    |  |                 |  |                         |
| The head of the household (alone or together with someone)                           | 6'559 | 14.5%              | 23.1%  | 41.0%           | 61.8%  | 61.7%                   |
| The spouse of the head of the household  | 3'488 | 10.3%              | 22.6%  | 22.9%           | 23.6%  | 22.9%                   |
| Daughter/son of head of household  | 4'208 | 1.8%               | 10.6%  | 30.2%           | 5.7%   | 2.2%                    |
| Other person   | 966   | 15.7%              | 31.0%  | 6.0%            | 8.9%   | 13.2%                   |
| <b>Employment</b>  |       |                    |  |                 |  |                         |
| Full time employed   | 7'082 | 6.6%               | 15.5%  | 56.7%           | 34.1%  | 20.5%                   |
| Part time employed   | 472   | 7.1%               | 17.5%  | 3.8%            | 2.4%   | 1.7%                    |
| Unemployed / not working   | 1'044 | 9.5%               | 15.8%  | 8.1%            | 7.2%   | 4.5%                    |
| Retired under a disability pension scheme (fully or partly)                          | 386   | 23.2%              | 27.1%  | 2.5%            | 5.7%   | 6.9%                    |
| Early retired under an early retirement benefit scheme                               | 438   | 21.9%              | 29.4%  | 2.9%            | 5.9%   | 8.0%                    |
| Retired (at the official retirement age)   | 2'630 | 26.9%              | 28.7%  | 16.5%           | 43.7%  | 57.8%                   |
| Student / pupil / in training  | 1'124 | 1.3%               | 14.9%  | 9.5%            | 1.0%   | 0.6%                    |
| <b>Education</b>   |       |                    |  |                 |  |                         |
| Ensino primário (4º ano)   | 2'032 | 26.2%              | 26.7%  | 12.8%           | 33.9%  | 40.6%                   |
| Ensino técnico equivalente ao grau de 9º ano   | 540   | 14.7%              | 27.3%  | 3.9%            | 5.0%   | 6.2%                    |
| Ensino básico (9º ano)   | 1'418 | 12.4%              | 19.1%  | 10.6%           | 12.3%  | 9.6%                    |
| Ensino técnico equivalente ao grau de 12º ano  | 1'140 | 9.2%               | 17.7%  | 8.9%            | 7.5%   | 5.3%                    |
| Ensino secundário (12º ano)  | 3'004 | 7.3%               | 20.1%  | 23.9%           | 15.2%  | 12.5%                   |
| Universidade (Bacharelato, Licenciatura, Mestrado Integrado, Mestrado, Doutoramento) | 4'670 | 7.1%               | 22.6%  | 37.2%           | 22.4%  | 21.5%                   |
| Outro  | 372   | 15.5%              | 26.1%  | 2.7%            | 3.7%   | 4.3%                    |

# 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  $\pm 3.1$  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>  |
| 1'000       | $\pm 3.1$                      | $\pm 2.2$                    |
| 5'000       | $\pm 1.4$                      | $\pm 1.0$                    |
| 10'000      | $\pm 1.0$                      | $\pm 0.7$                    |