

Results

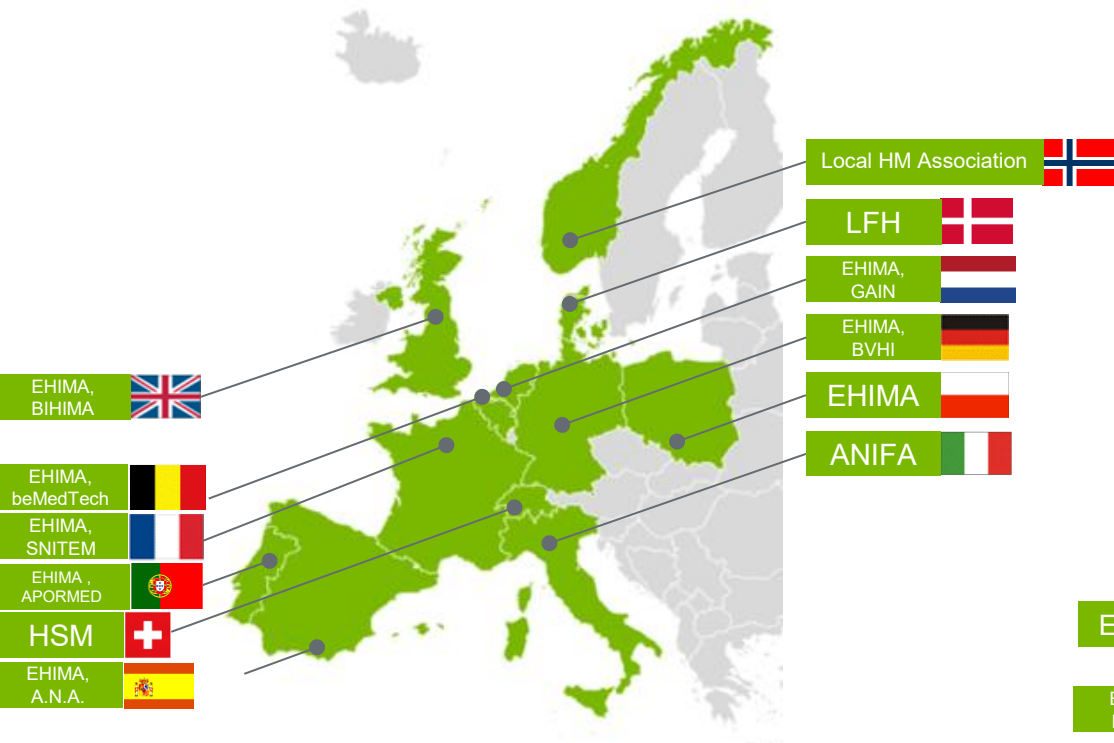
EuroTrak NLD 2026

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

Summary

1. Introduction

EuroTrak NLD 2026 is part of the EuroTrak / APACTrak studies:



EuroTrak NLD 2026 was designed and executed by Anovum (Zurich) on behalf of GAIN and EHIMA.

Sample sizes:

Representative sample (sample 1): n=14'364 people

Hearing impaired (sample 2): n= 1297 people
Hearing impaired non-owners (HA Non-owner): n= 645 people
Hearing aid owner (HA Owner): n= 652 people



Summary

2. Market overview

- **Stated hearing loss prevalence**
 - Total: 10.7, 18+: 12.4%.
 - Hearing Tests: 28% had a hearing test in the last five years, most tests done by hearing aid shops.
- **Hearing aid adoption rate (HA penetration)**
 - 51% of those with self-declared HL.
 - 5.5% of total population.
 - 71% of HA owners have binaural treatment.
- **The route to the hearing aid**
 - 70% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
 - 54% got hearing aids recommended from the ENT or family doctor (drop out rate=23%).
 - 62% of the GP consultations referred to an ENT, 27% to an HA shop, and 13% to get hearing aids. 9% recommended no action.
 - 47% of ENT consultations were referred to a HA Shop, 37% recommended getting a hearing aid, and 24% 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.
 - 52% of working adults who wear hearing aids believe that these devices allow them to stay in the workforce longer
 - Hearing aid owners have a slightly lower risk of being depressed.
 - Hearing aid owners are less exhausted in the evening.
 - Quality of sleep seems to improve if the hearing impaired use hearing aids.

Summary

3. Analysis of hearing aid owners

- **Hearing aid ownership, usage, and accessories**
 - 82% of the hearing aid owners received some kind of third party reimbursement.
 - 61% of the currently owned HAs were acquired in 2023 or later.
 - The median age of hearing aids before replacement is five years.
 - On average, HAs are worn 9.2 hours a day.
 - RICs are the most often purchased type of HA.
 - Cochlear Implants: 18% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
 - 54% of HA owners use a hearing aid app, and 69% of them are satisfied with it.
- **Hearing aid satisfaction and importance of listening situations**
 - 83% of the hearing aid owners say their hearing aid works better than or as expected.
 - 72% of the HA owners are satisfied with their hearing aids.
 - The more hours worn per day, the higher the satisfaction with the HA.
 - Satisfaction with newer hearing aids is higher than with older hearing aids.
 - The most important listening situations are conversations with family members at home, phone conversations, and group conversations.
- **Positive impact of HAs**
 - Hearing aids positively impact overall communication ability in most situations, as well as social participation and social life.
 - 74% of hearing aid owners feel more confident moving in a city since wearing hearing aids.
 - 93% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
 - 61% of all HA owners think they should have gotten their HAs sooner

Summary

4. Analysis of hearing impaired non-owners

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

- 58% of hearing impaired without hearing aids don't know whether a third party would pay any part of hearing aids.
- The main reasons for not having hearing aids are the belief that they do not perform well in noisy situations, perceiving one's hearing as good enough in most situations, and the ENT's opinion.
- 4% who own hearing aids don't use them (0 hours); 11% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**

- 64% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely that somebody makes fun of or rejects a hearing impaired without a hearing aid.
- The most important reasons for buying a hearing aid are worsening hearing loss and the advice of ENTs

Detailed Results: Roadmap

1. Introduction

- Organisation of EuroTrak NLD 2026
- 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 aids, 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 NLD 2026

Organisation

- Principal of the project EuroTrak NLD 2026 is: EHIMA and GAIN.
- Anovum Zurich developed the concept of EuroTrak NLD, 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 NLD/2026/n=[relevant sample size]”
- Member companies of the principal can ask Anovum to further analyse the raw data in specific ways at their own expense.

Recruitment process: In search of hearing impaired people

Step 1: Screening interviews

Objective: Prevalence of hearing loss and hearing aid ownership

Process:

1. Representative sample with strict quotas that represent the overall population (Age/Gender interlocked; soft quota on region)
2. Contacts from large panellist pools
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n=14'364** people based on census data.

Step 2: Target population interviews

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

Process:

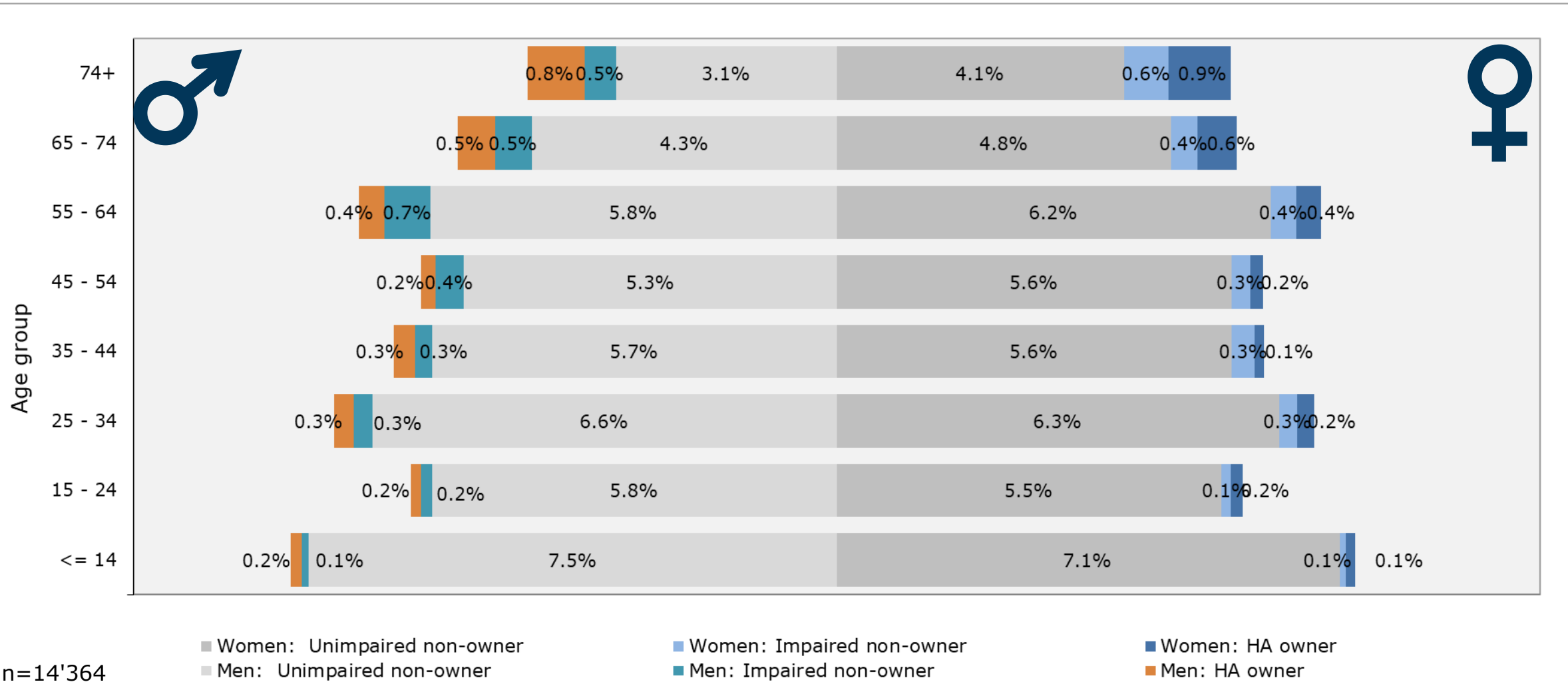
1. Main questionnaires: Owners and hearing impaired non-owners
2. Balancing through weighting according to representative screening interviews
3. Resulting sample: **n= 645** hearing impaired non-owners and **n=652** hearing aid owners

2. Market overview

Prevalence of hearing loss and adoption rate



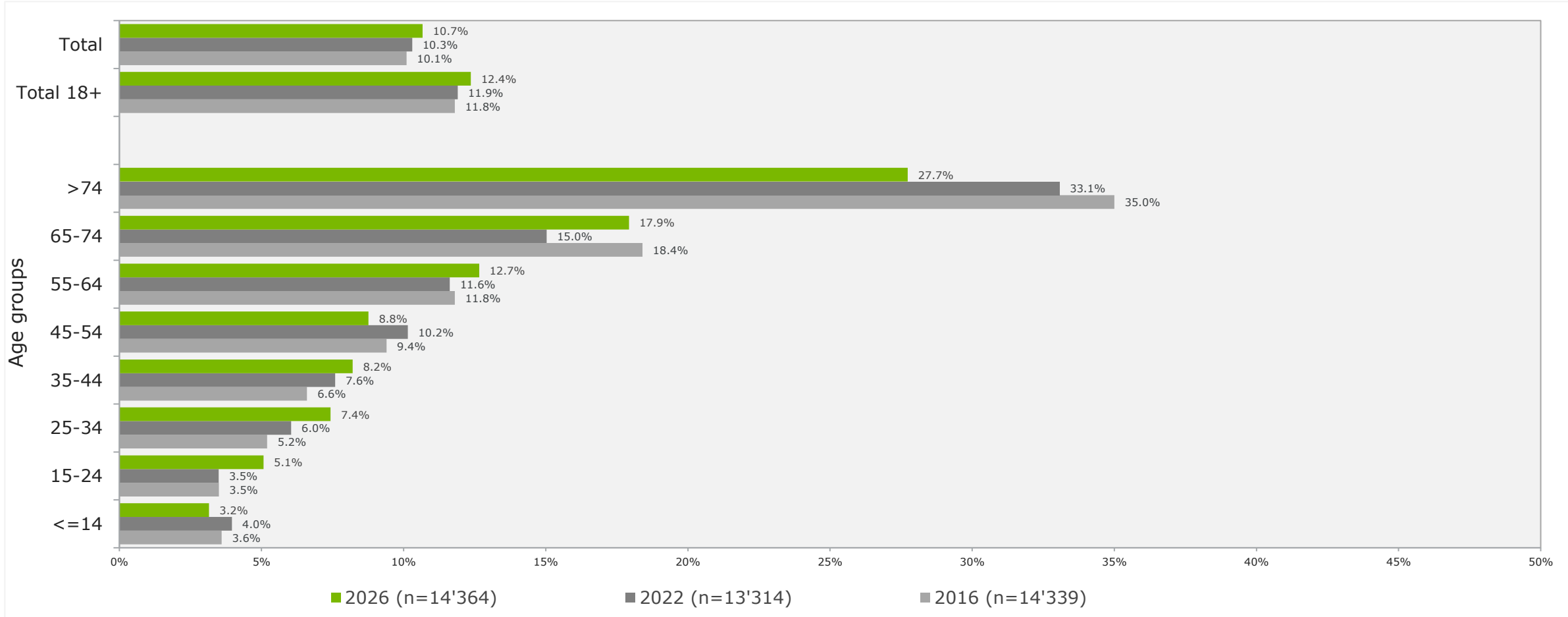
Hearing loss and hearing instrument ownership by gender/age



Hearing loss prevalence NLD

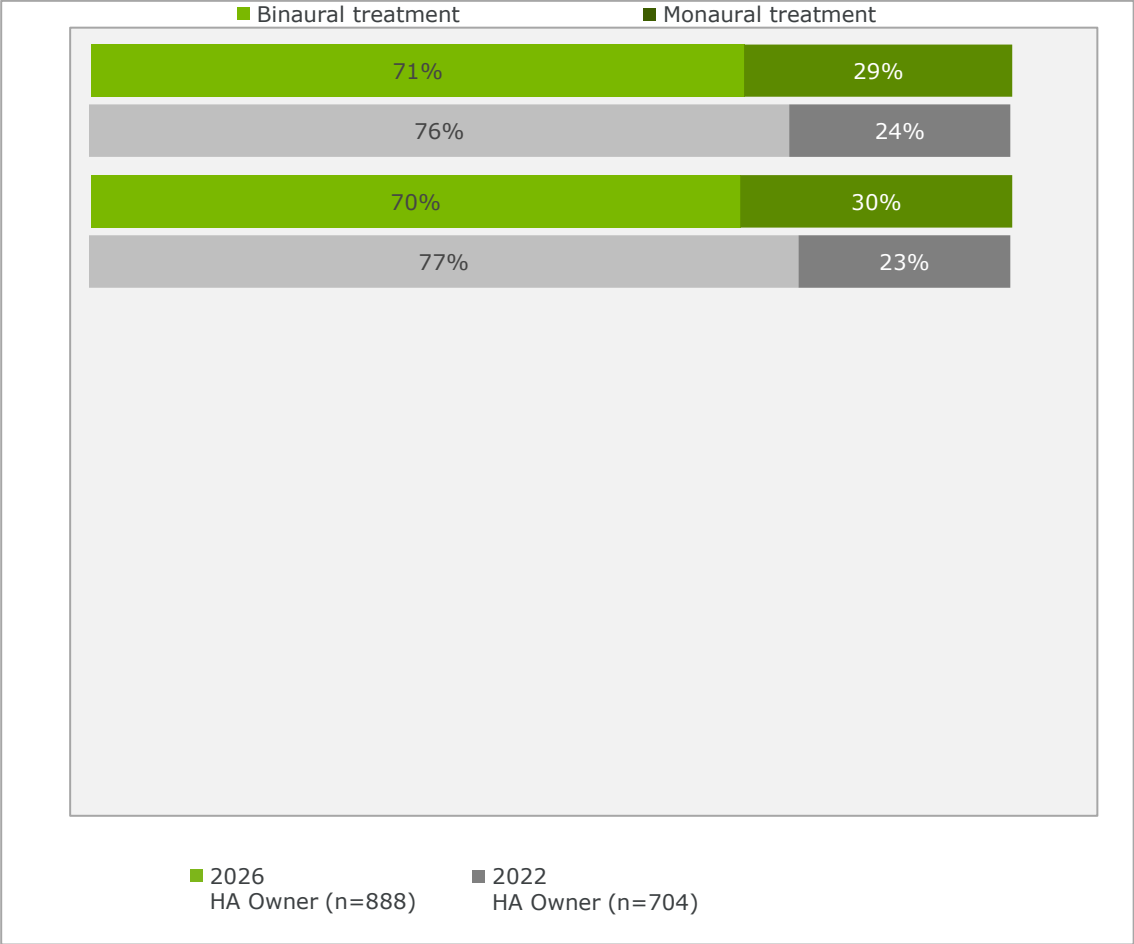
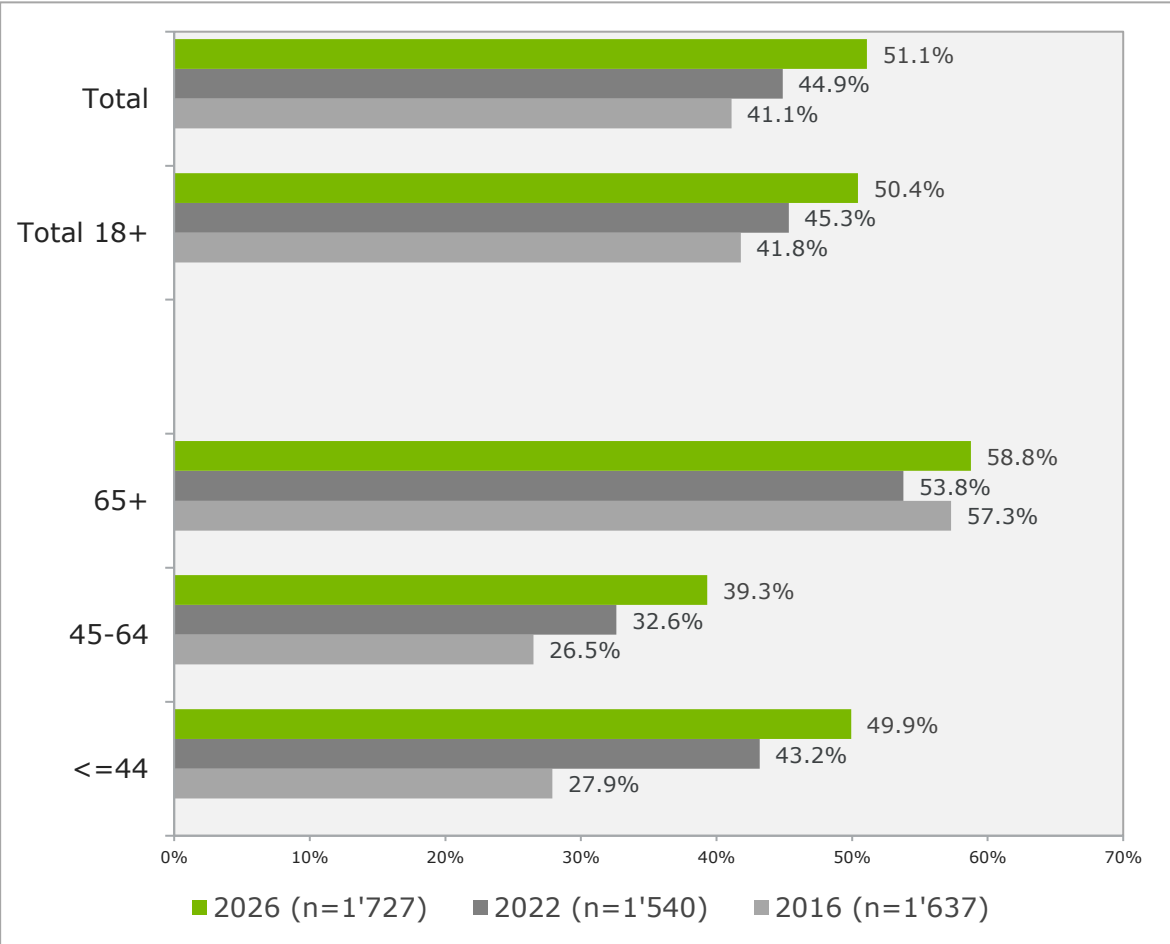
Self-declared hearing loss

% hearing loss prevalence by age groups



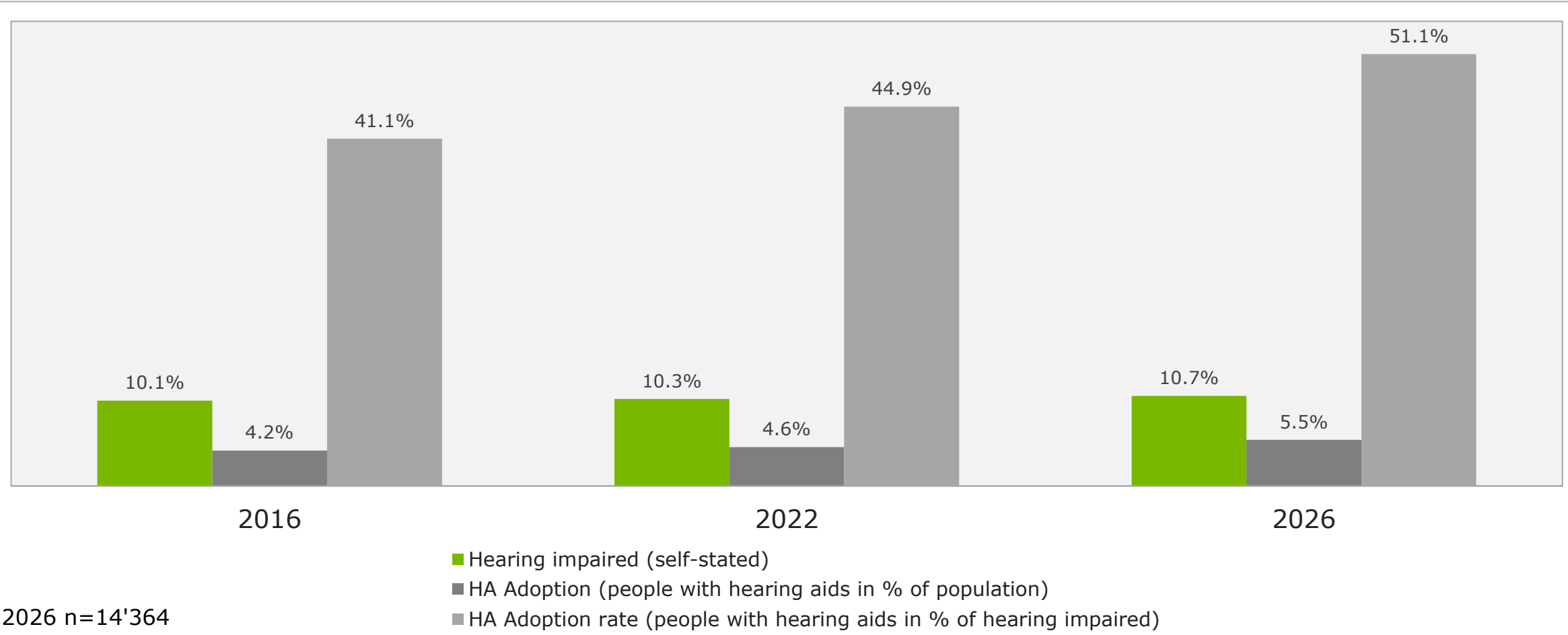
Hearing aid adoption rate: 51% of the hearing impaired have hearing aid(s), and 71% of them have binaural treatment

% of hearing impaired



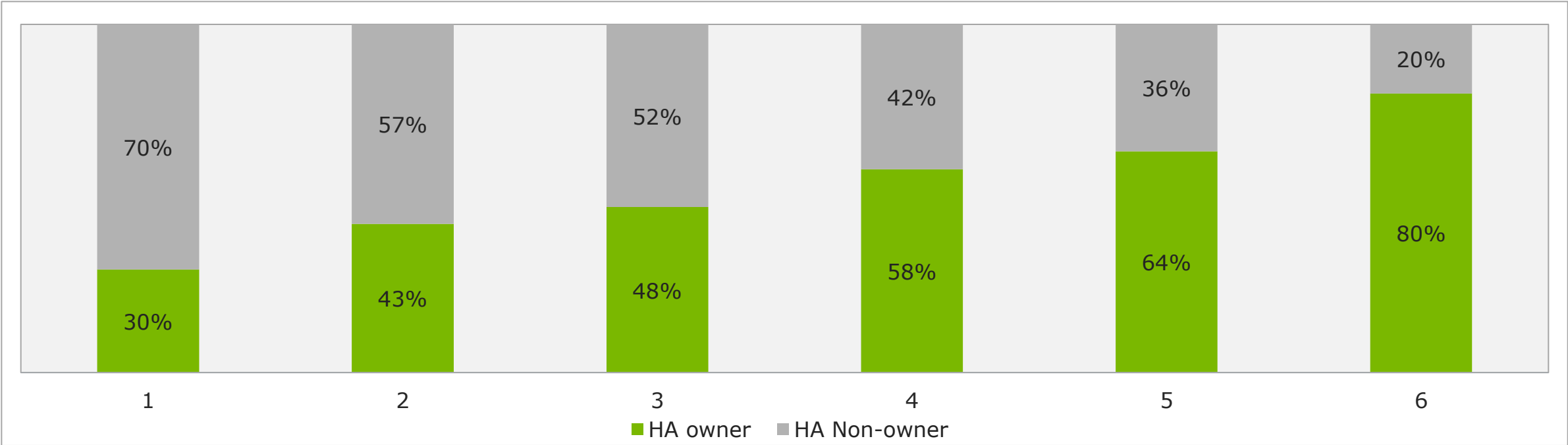


Overview of hearing loss prevalence and hearing aid adoption





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



Hearing loss sixtile-groups

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

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

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

HA Non-owner n=645
HA Owner n=652



Hearing loss

Hearing loss characteristics: Owners compared to non-owners

	HA Non-owner n=645	HA Owner n=652	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	43%	26%	41%
Bilateral loss	57%	74%	60%
Perceived loss			
Mild	38%	12%	25%
Moderate	46%	49%	53%
Severe	15%	31%	71%*
Profound	2%	8%	

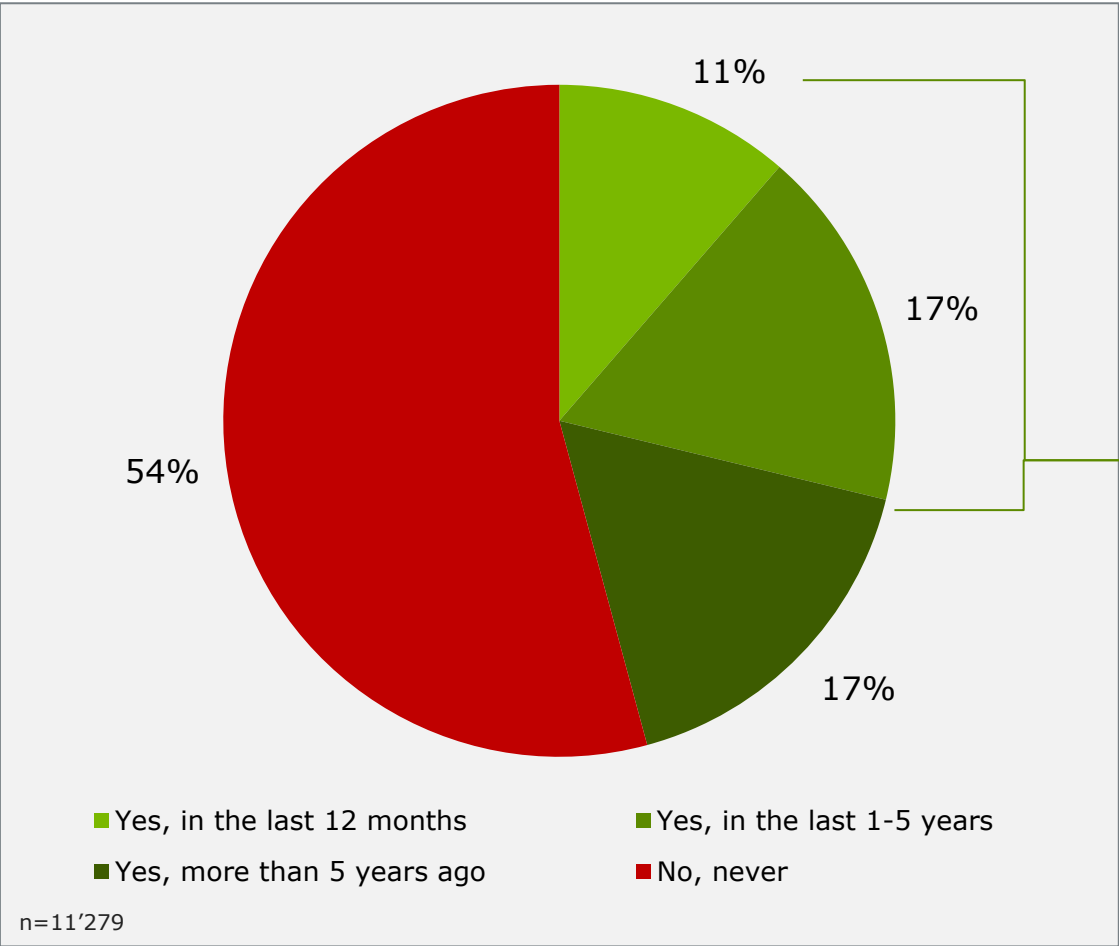
* combined “severe” and “profound” because n is too small

Hearing tests and where hearing is tested

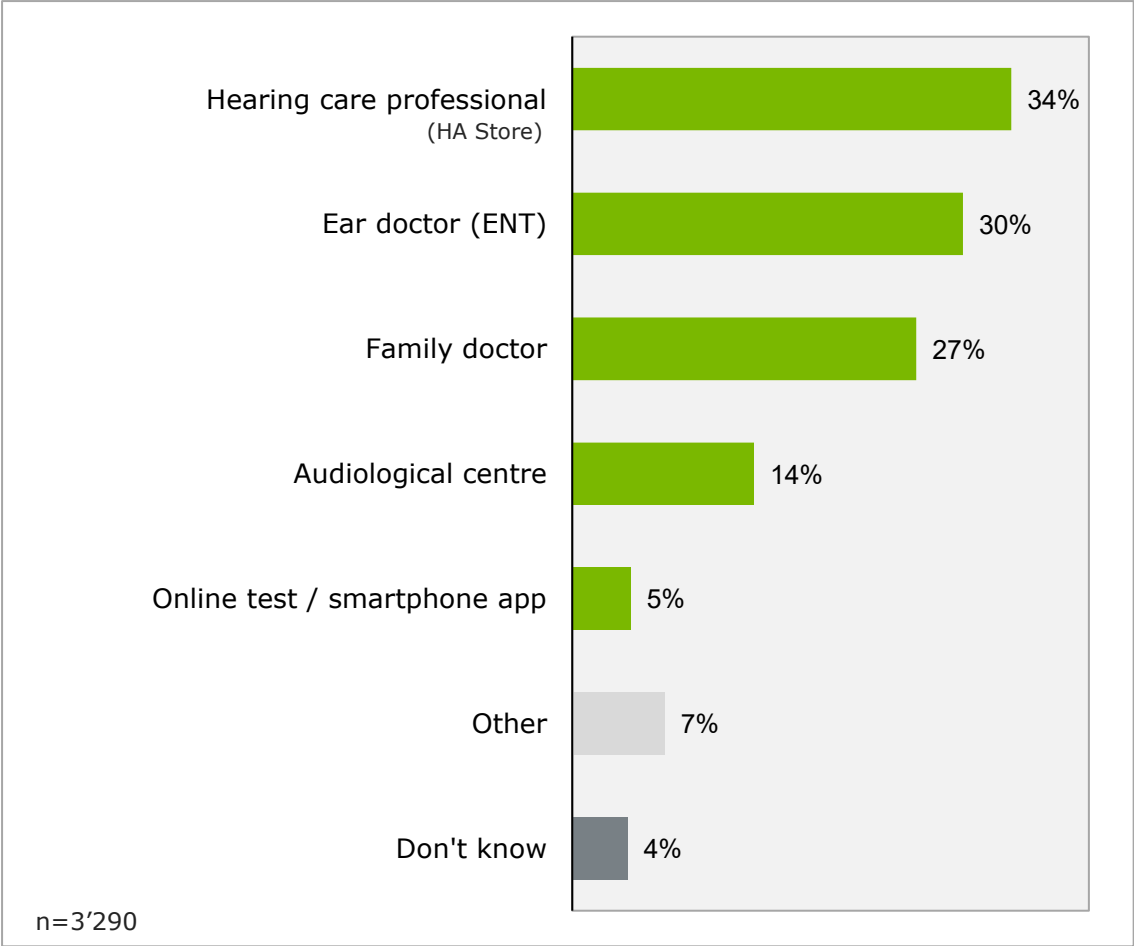


Hearing Tests: 28% had a hearing test in the last five years, most tests done by hearing care professionals

Have you ever taken a hearing test?



Where/how was your hearing tested?

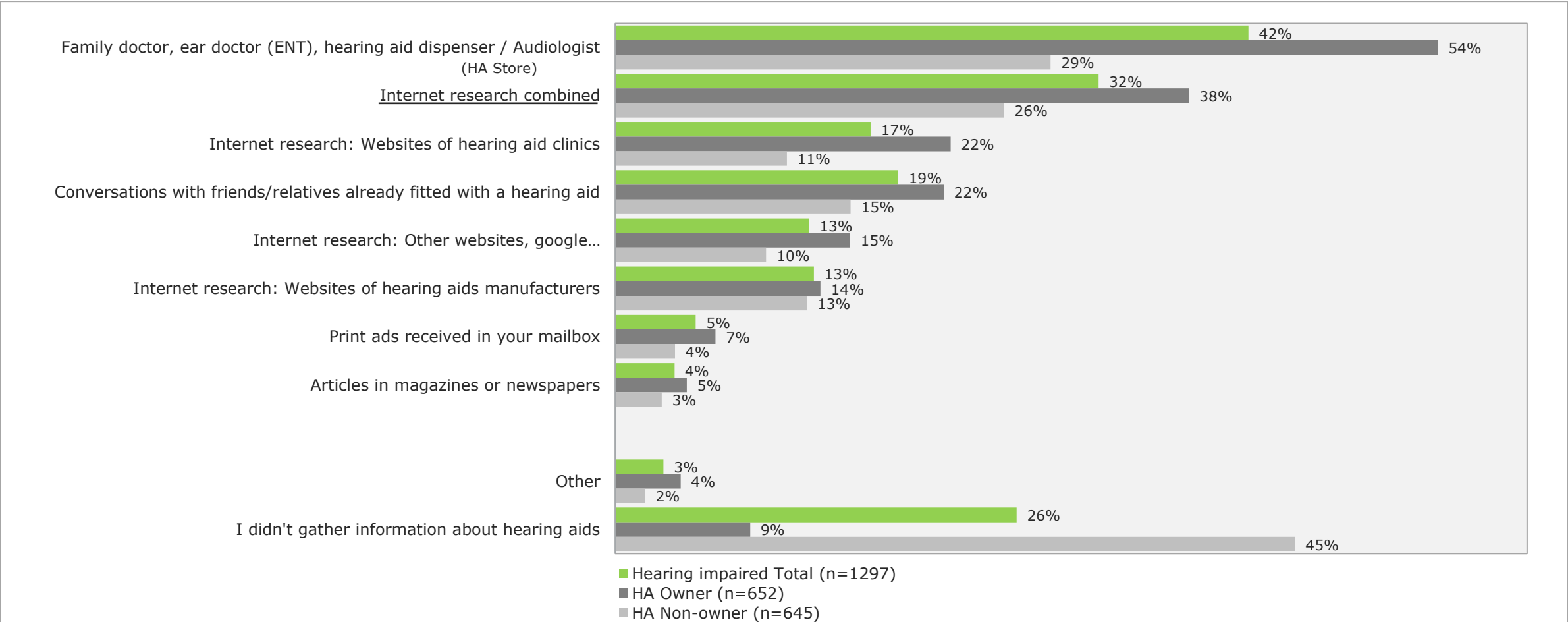


The route to the hearing aid: Sources of information and drop-out rates



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

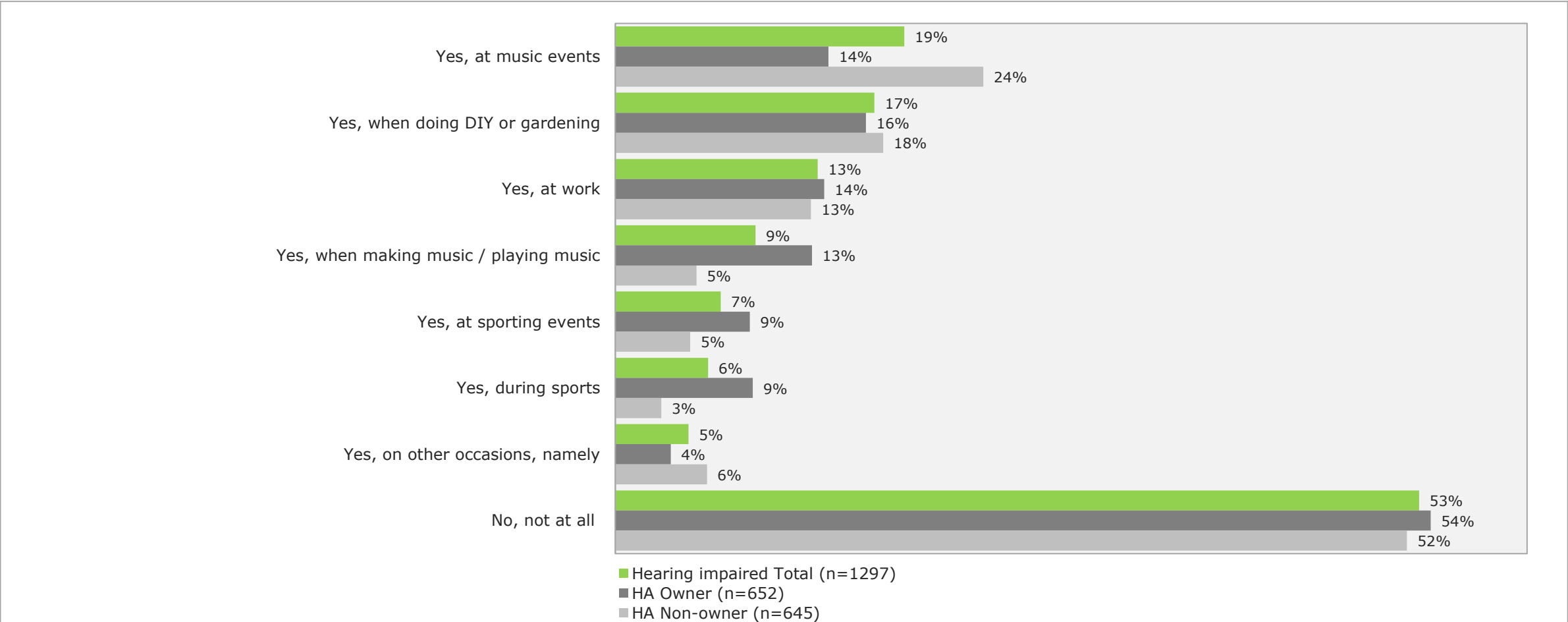
Where did you gather information about hearing aids?





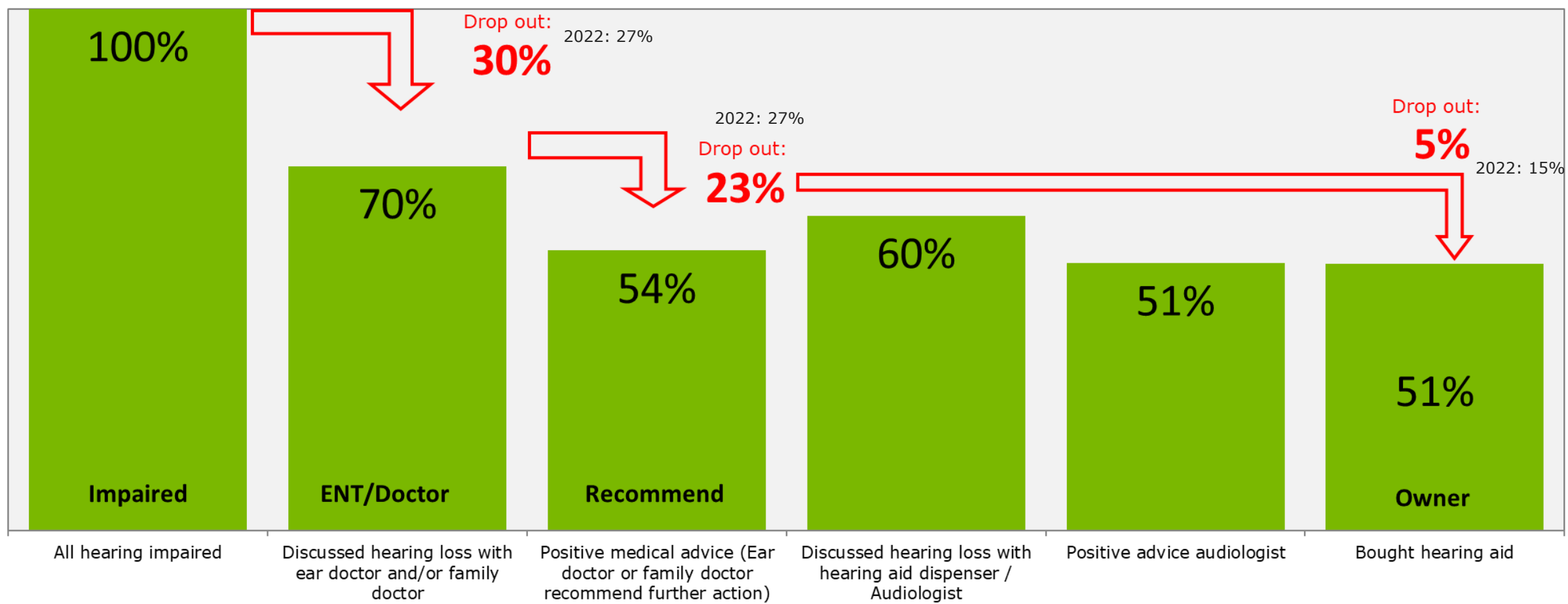
Usage of hearing protection by hearing impaired

Do you use hearing protection at least occasionally?





The route to the hearing aid

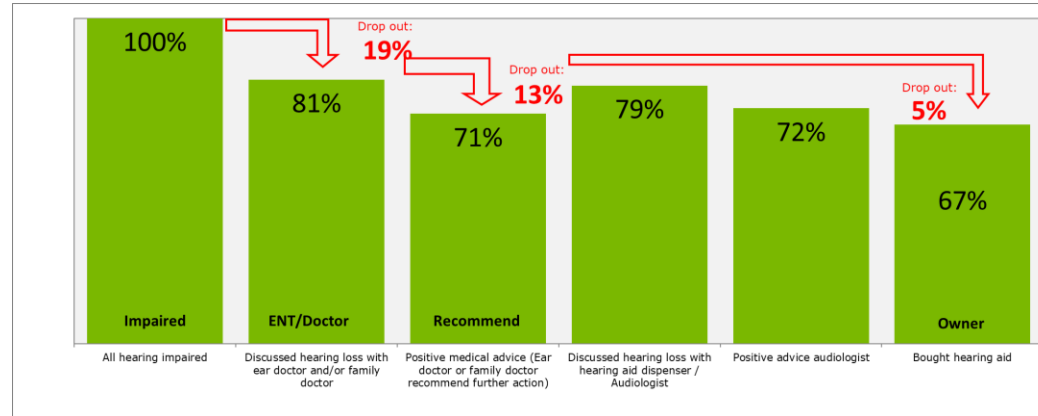


n=1'297

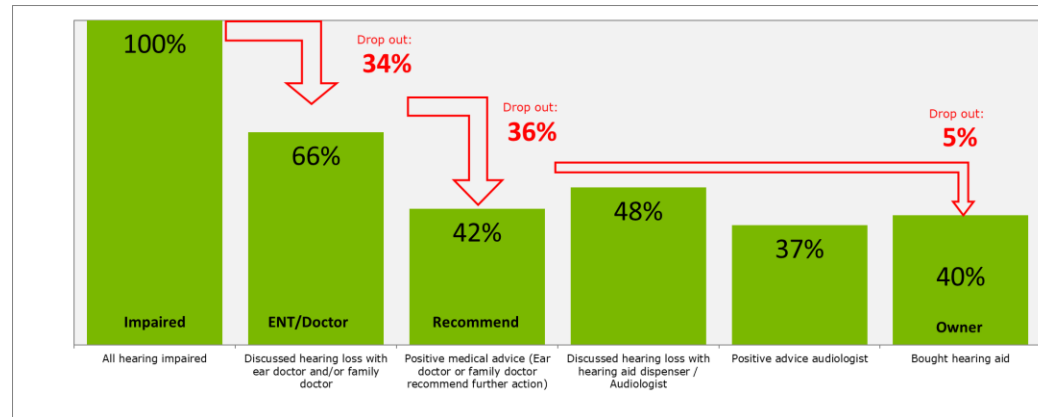


Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*



Low 50% hearing loss*



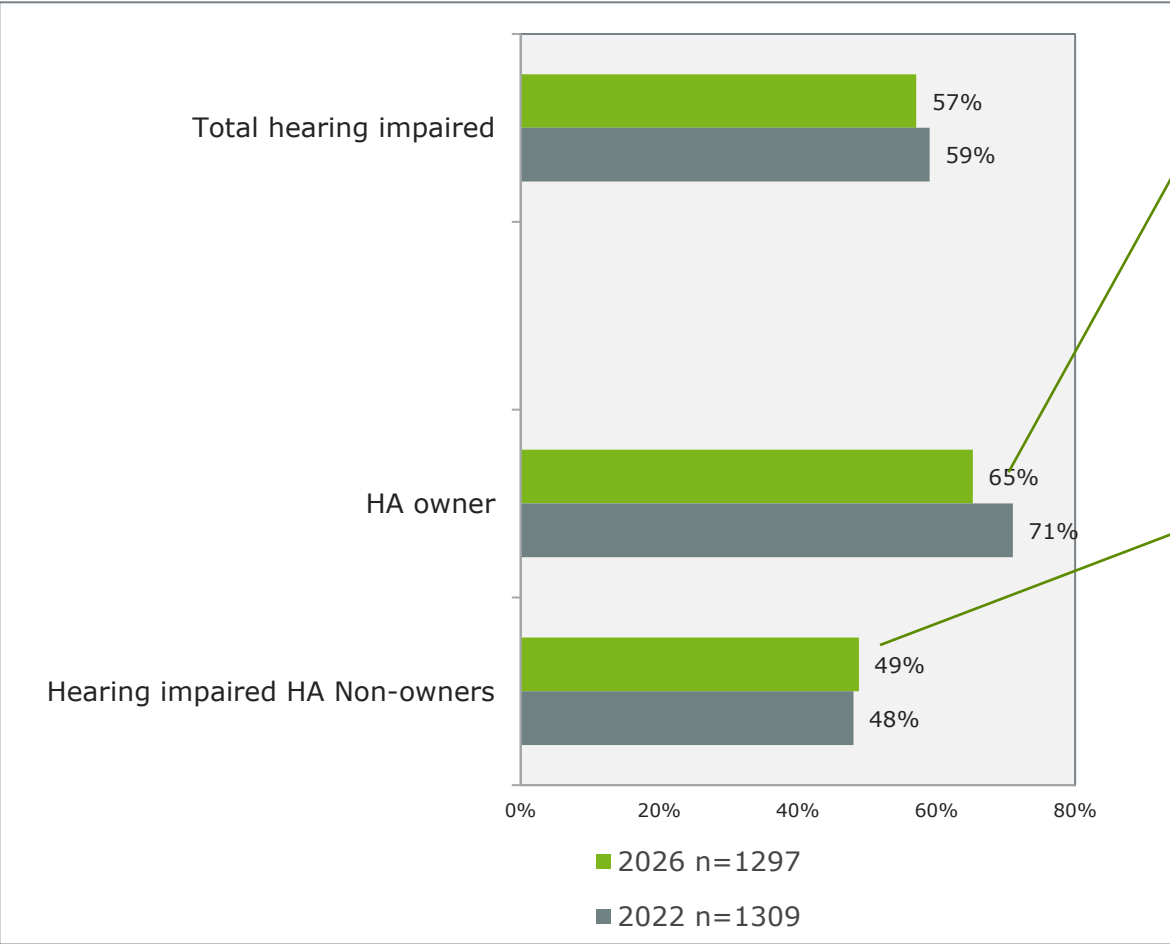
* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

- 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

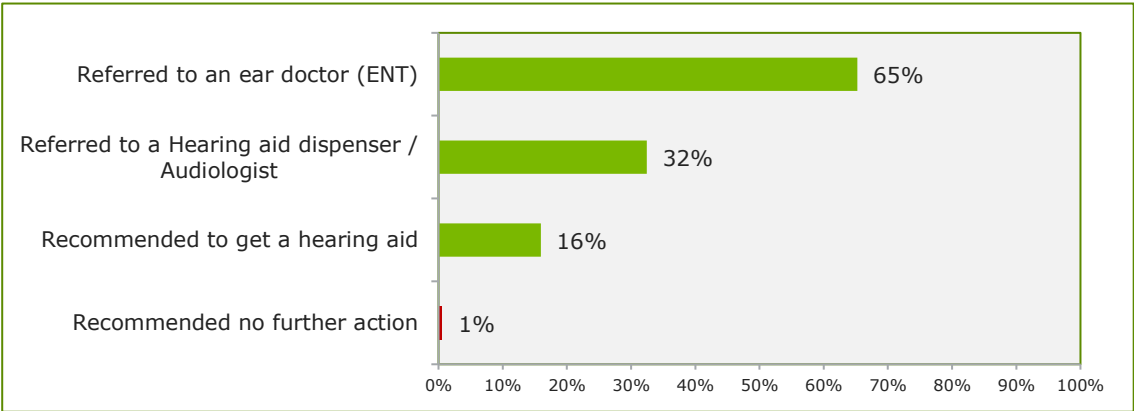
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

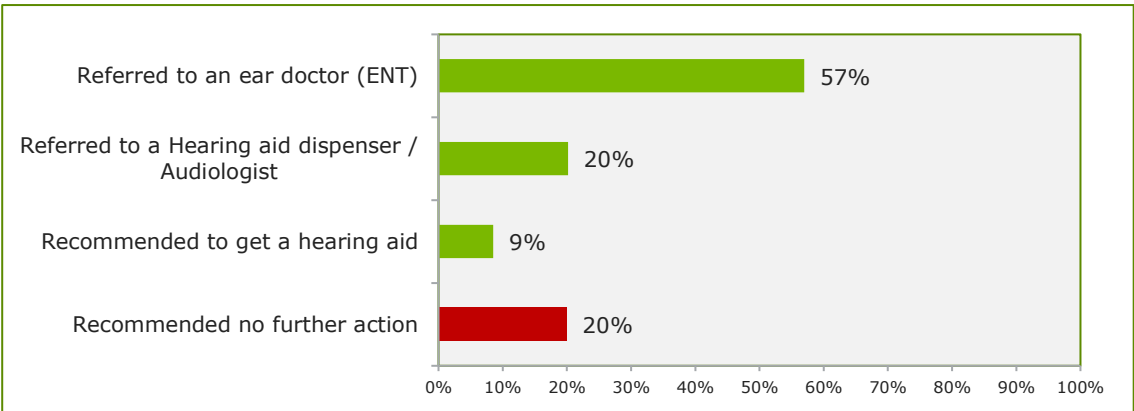


What did he/she recommend?

HA Owner (n=431)



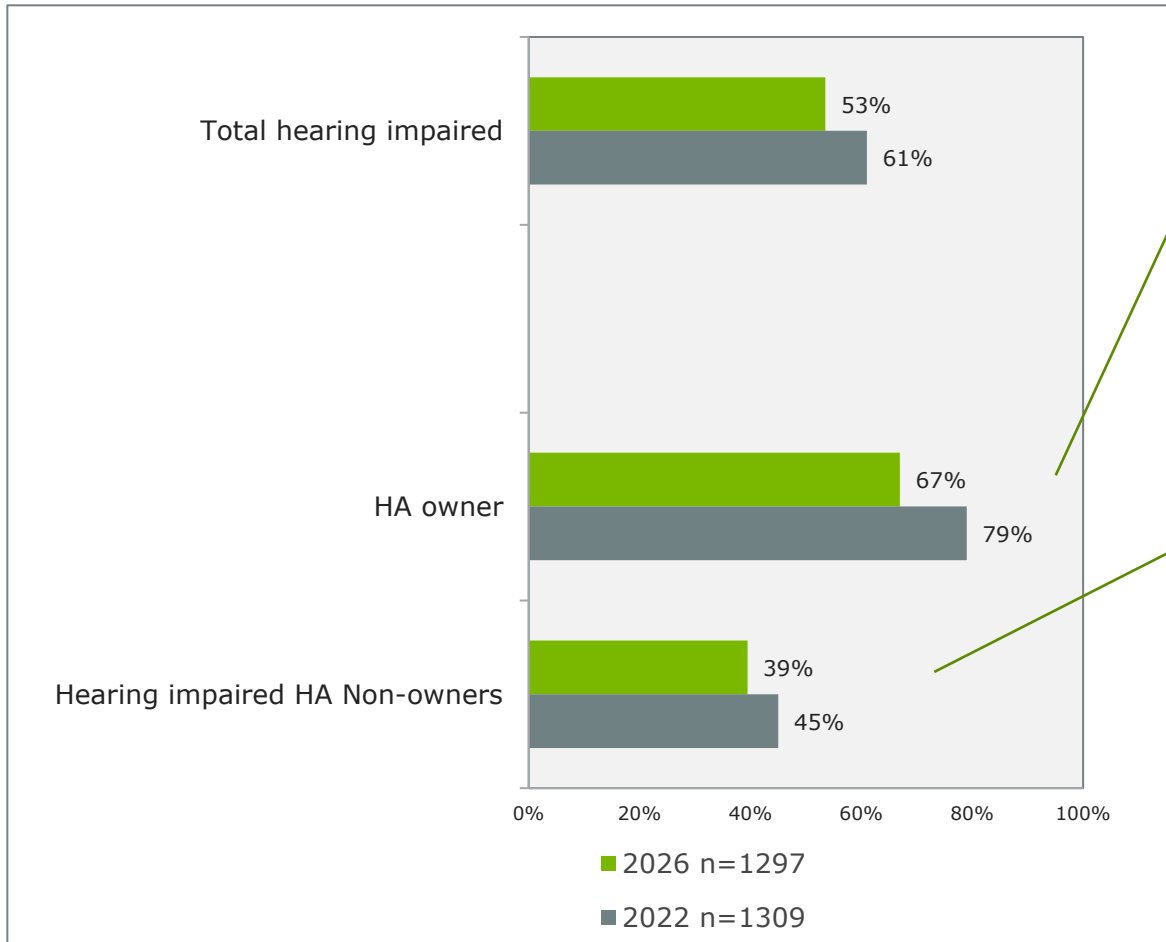
Impaired HA Non-owner (n=293)



The route to the hearing aid: ENT

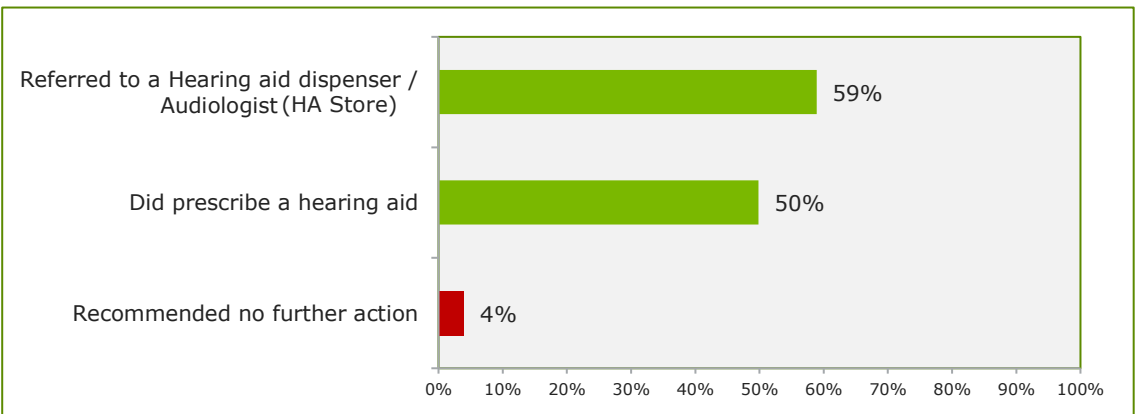
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

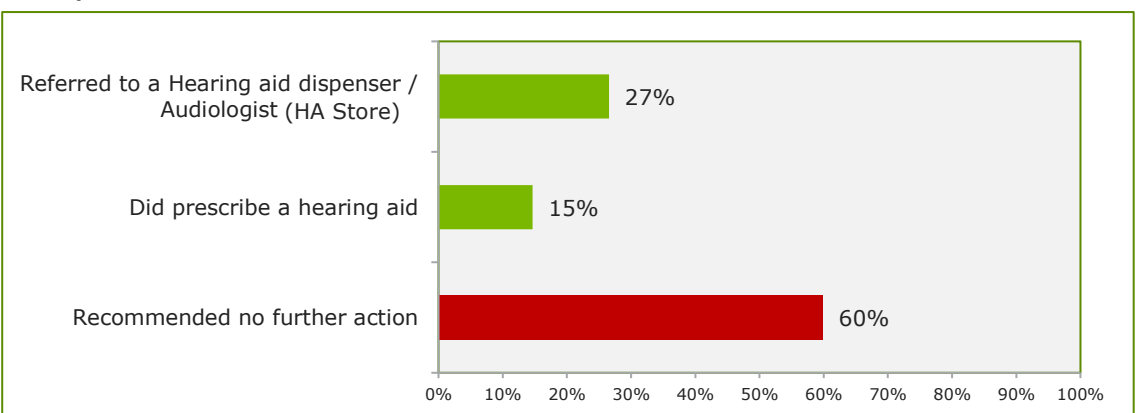


What did he/she recommend ?

HA Owner (n=432)



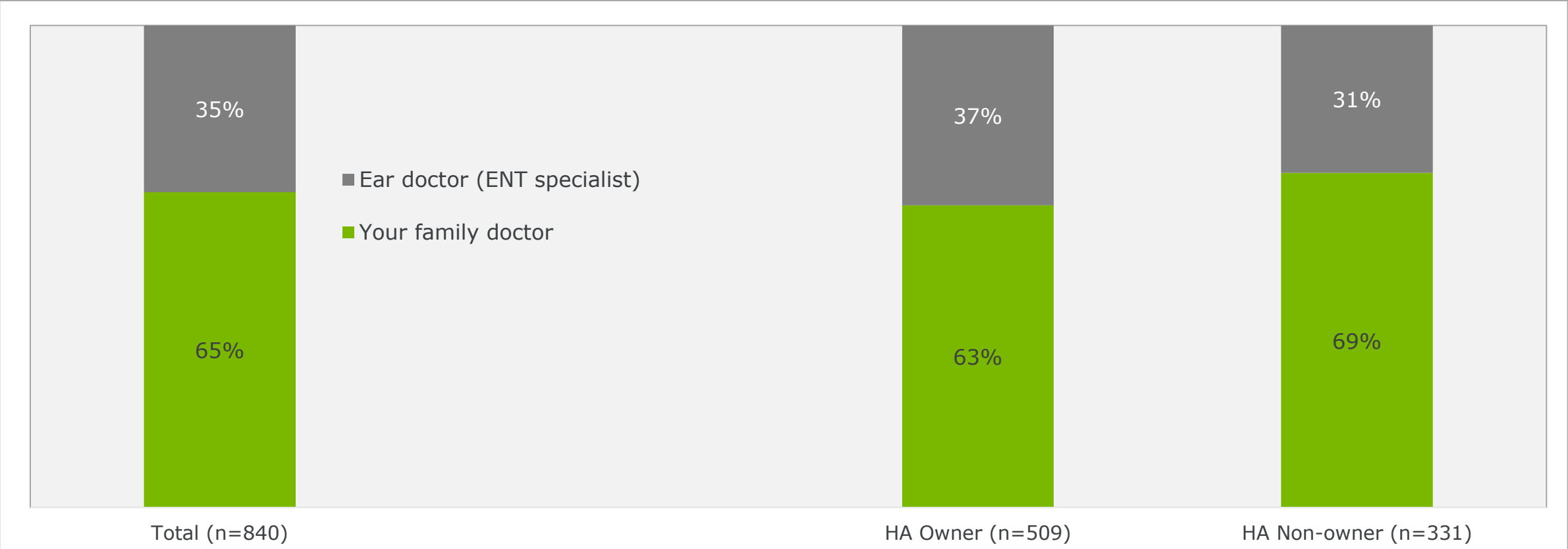
Impaired HA Non-owner (n=233)





Of those who discussed the hearing loss with a doctor, 65% spoke to a GP/family doctor first, and 35% talked to an ear doctor (ENT) first

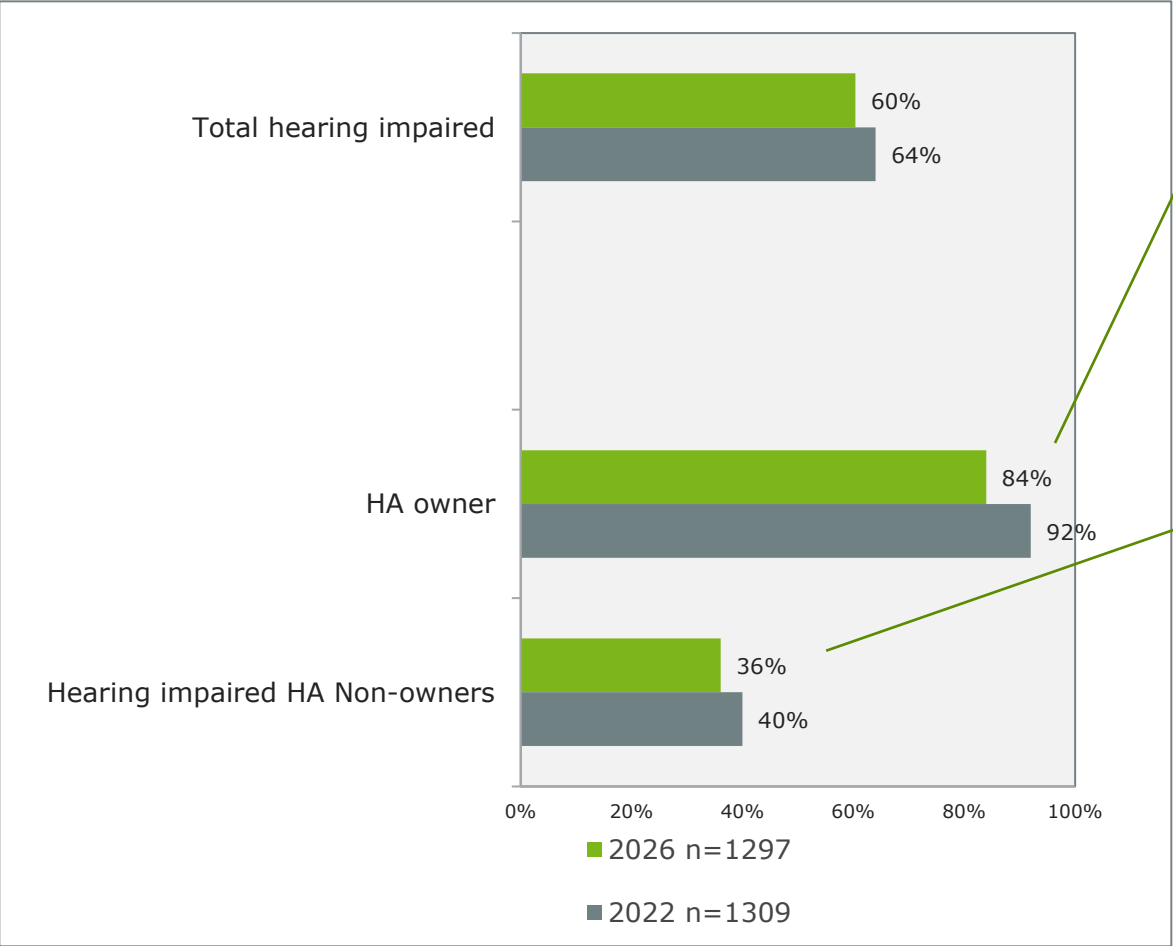
Those who discussed hearing loss with family doctor and/or ENT:
Who was the doctor you discussed your hearing loss with for the **first time** – your family doctor or the Ear, Nose and Throat specialist (ENT)?



The route to the hearing aid: Audiologist

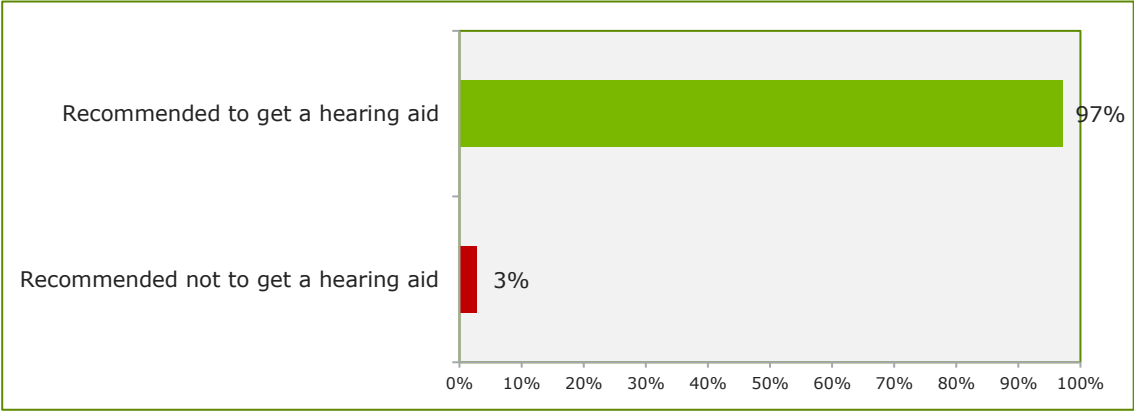
Have you ever discussed your hearing problem with an Audiologist?

% Discussed with Audiologist (HA Store)

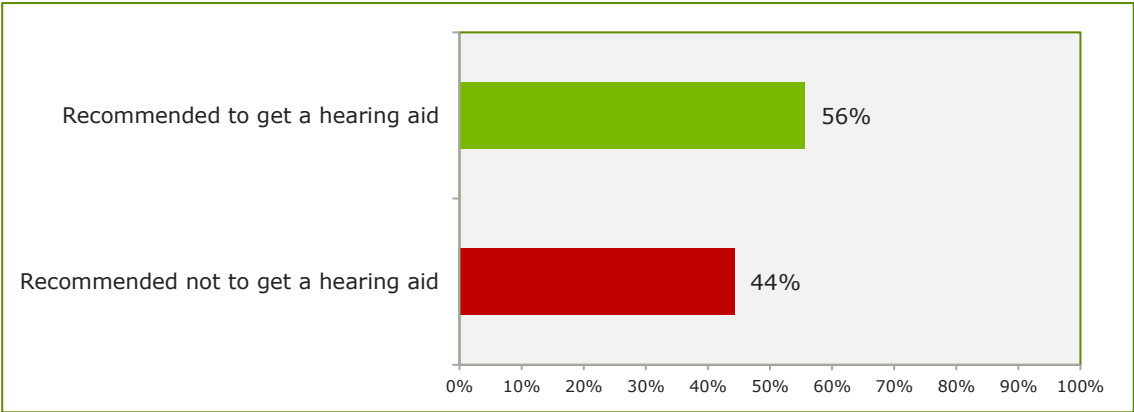


What did he/she recommend ?

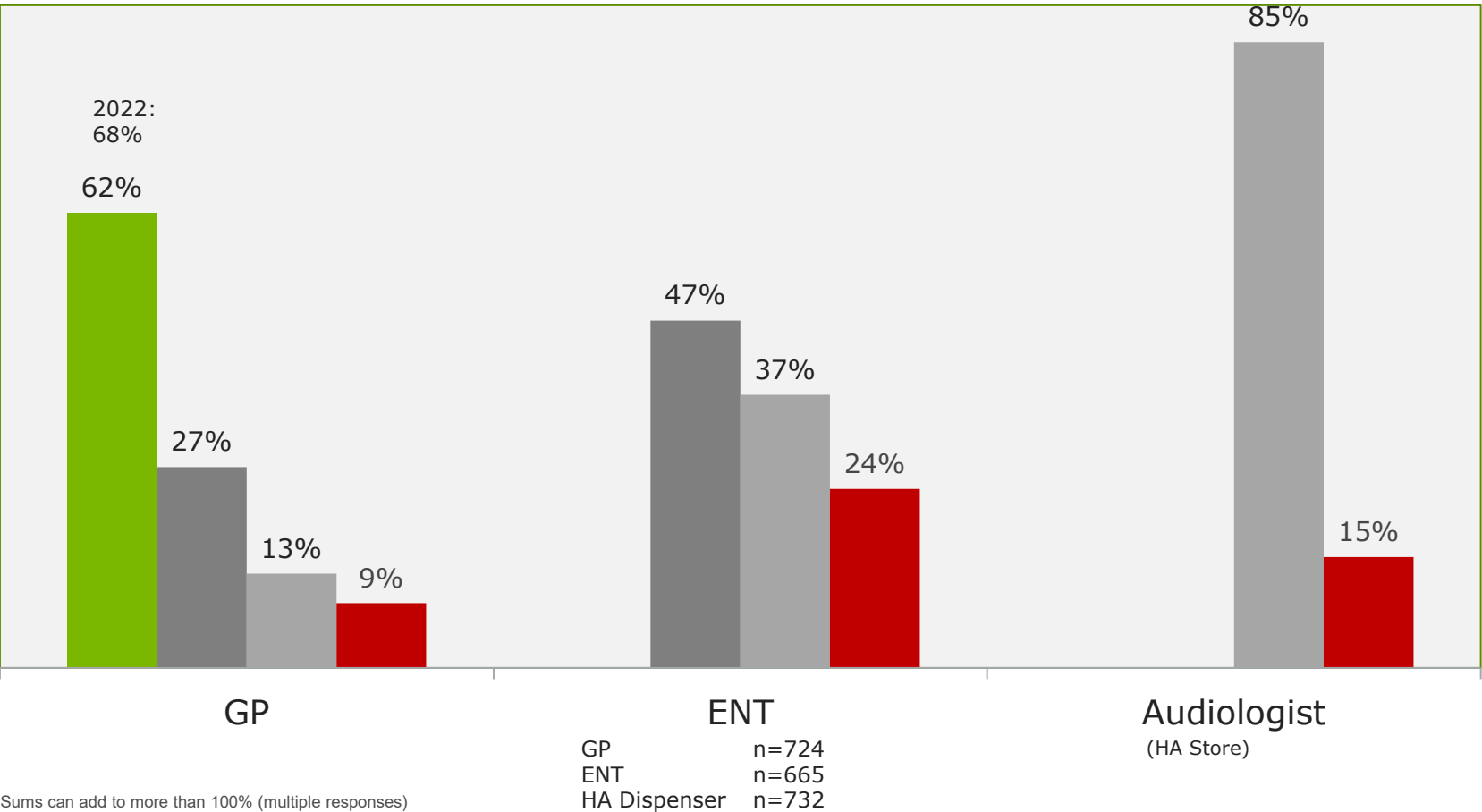
HA Owner (n=528)



Impaired HA Non-owner (n=204)



Recommendations by profession



- Referred to an ear doctor (ENT)
- Referred to a Hearing aid dispenser / Audiologist (HA Store)
- Recommended to get a hearing aid
- Recommended no further action

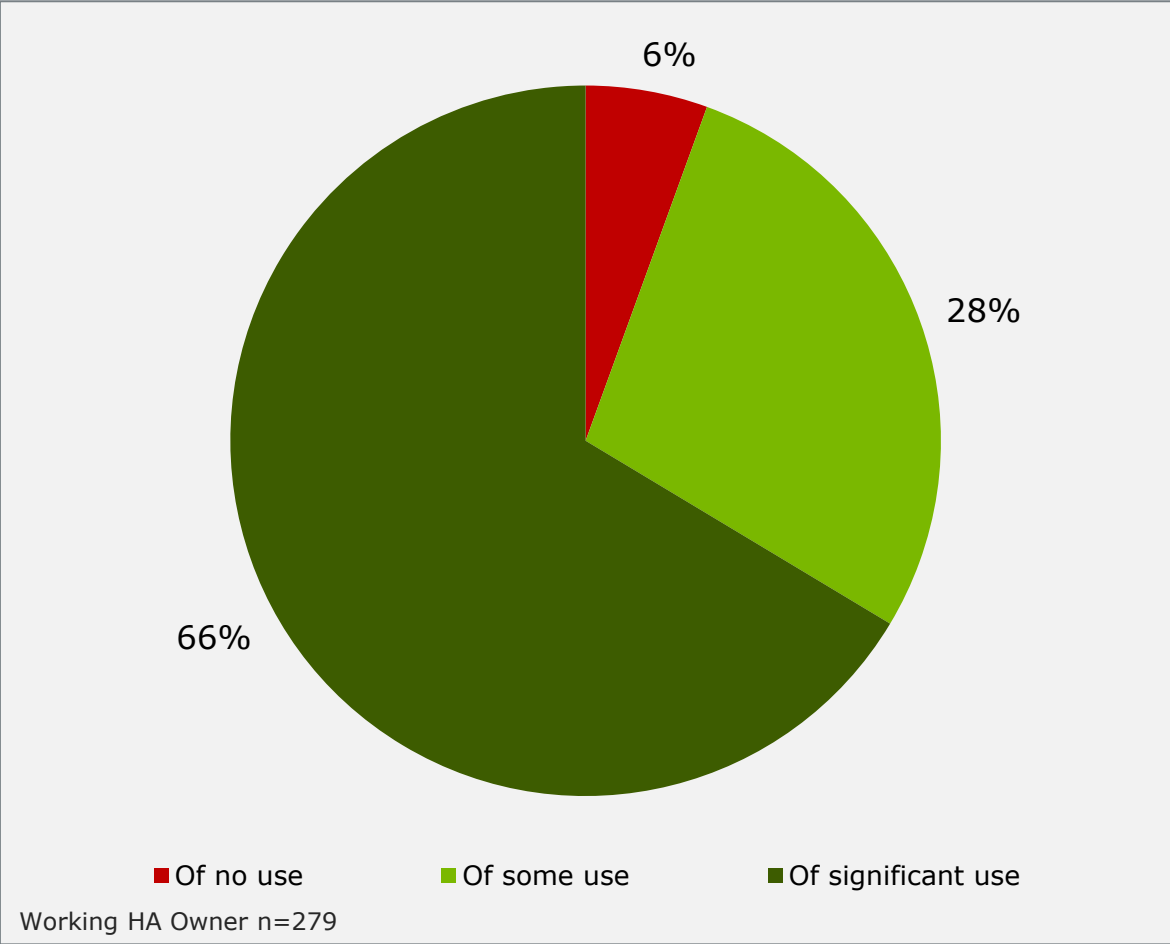
Sums can add to more than 100% (multiple responses)

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

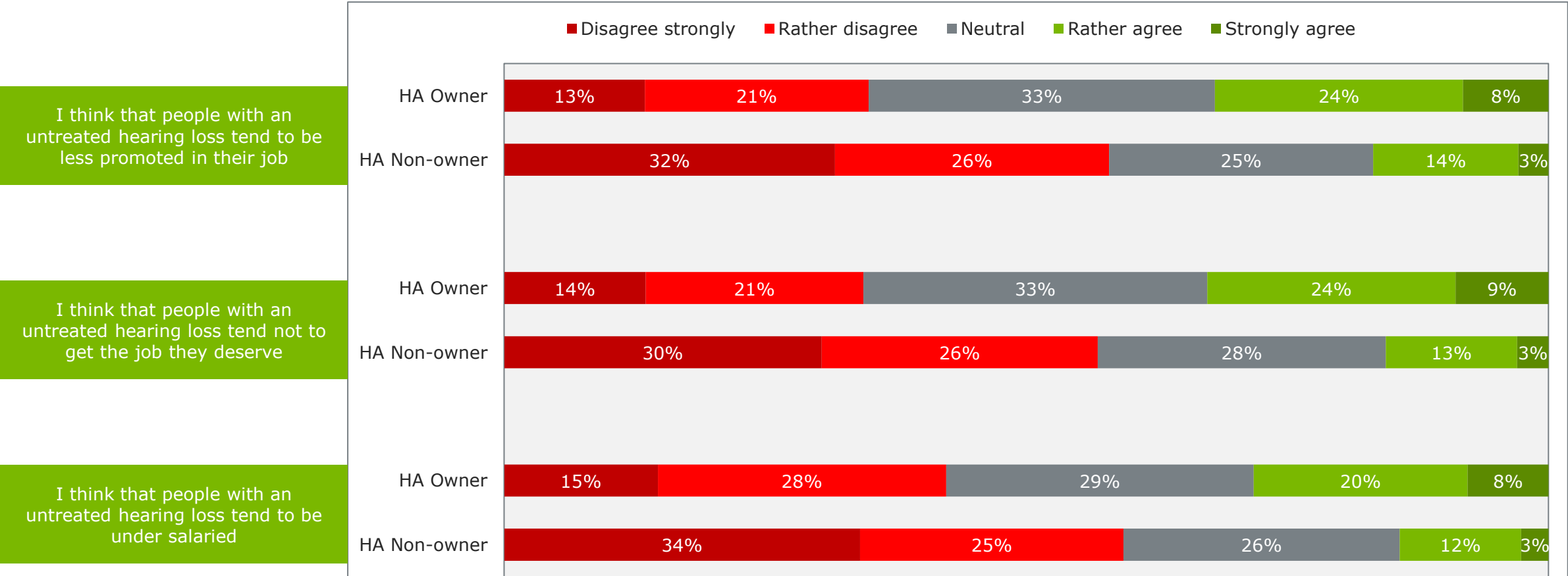
Work competitiveness, depressive symptoms, sleep quality, co-morbidities

Work competitiveness: 94% 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=472 / HA Non-owner n=496

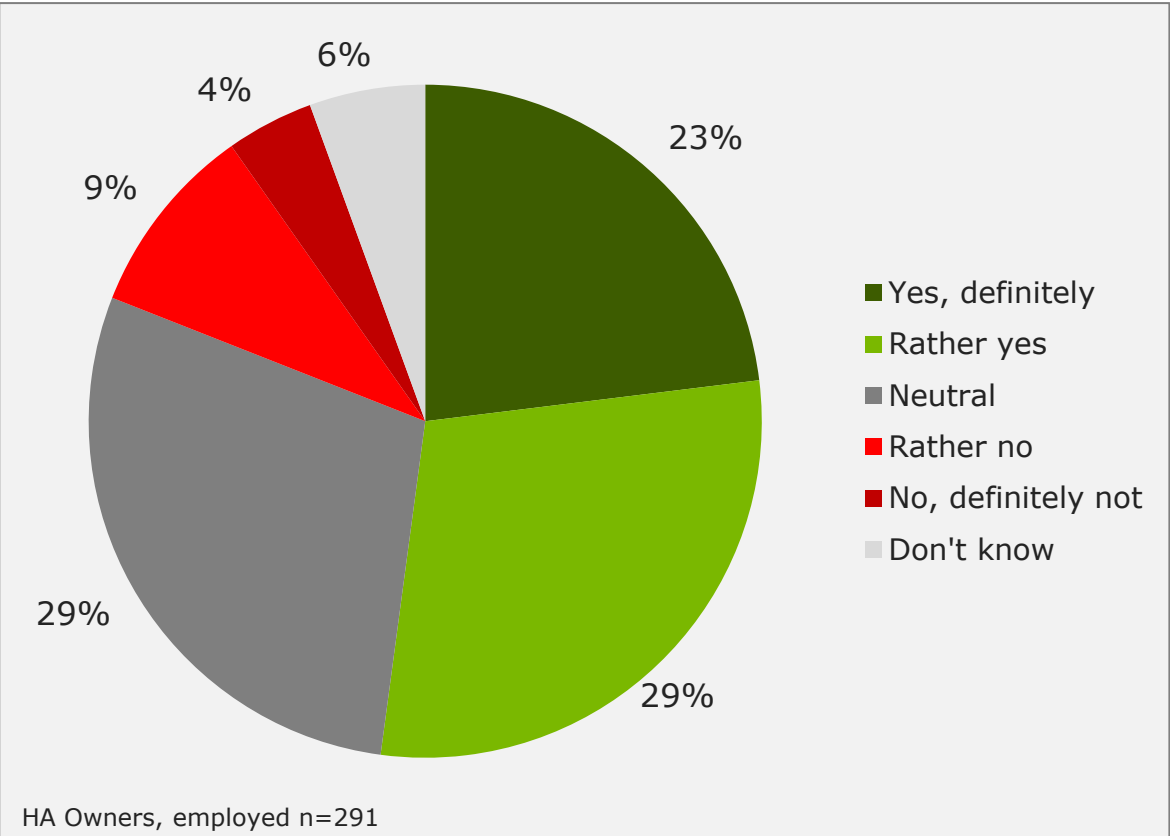




52% of working adults who wear hearing aids believe that these devices allow them to stay in the workforce longer

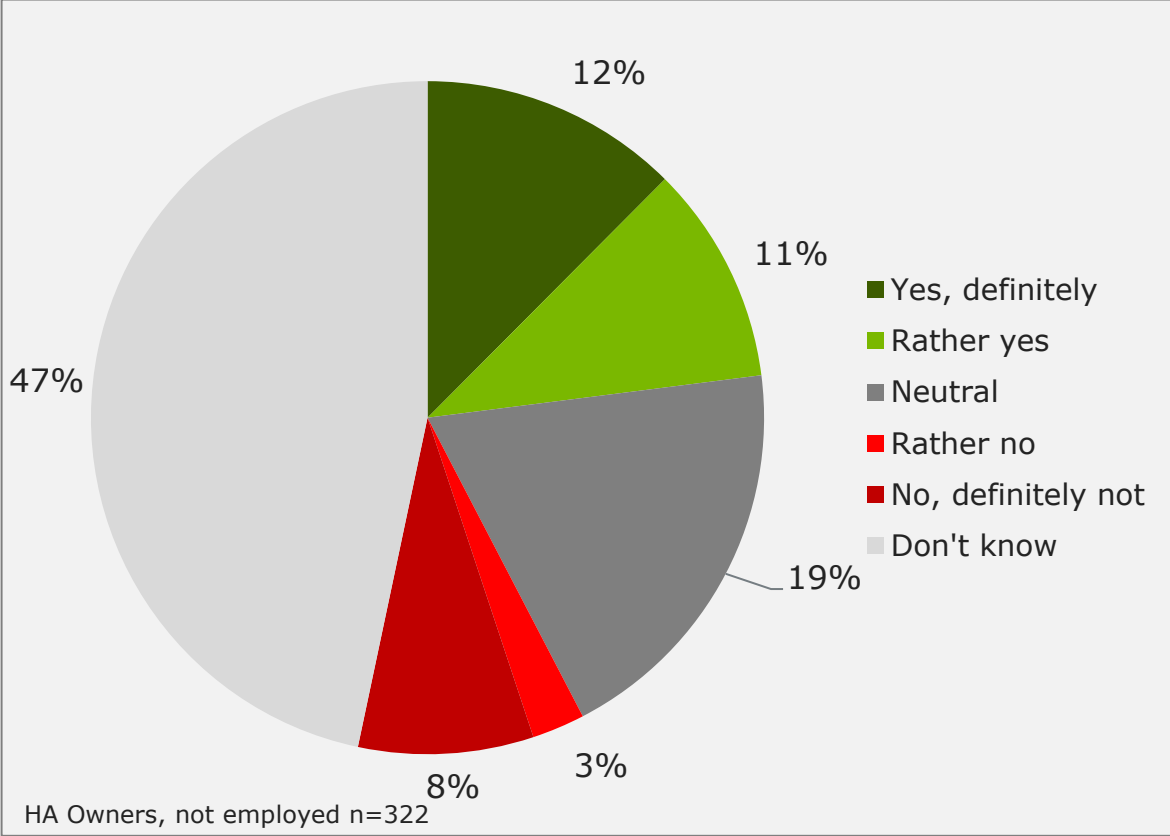
HA Owners, employed:

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



HA Owners, NOT employed:

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

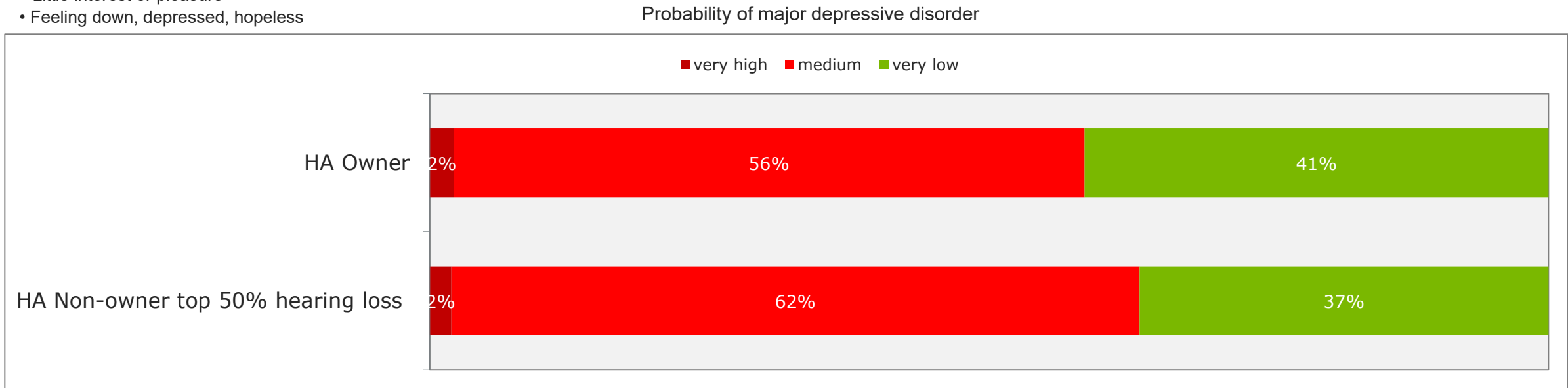




General health problems: Hearing aid owners have a slightly lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*)

Depression symptoms:
PHQ-2 Screening:
In the last 2 weeks:

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



HA owner n=442 / 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:

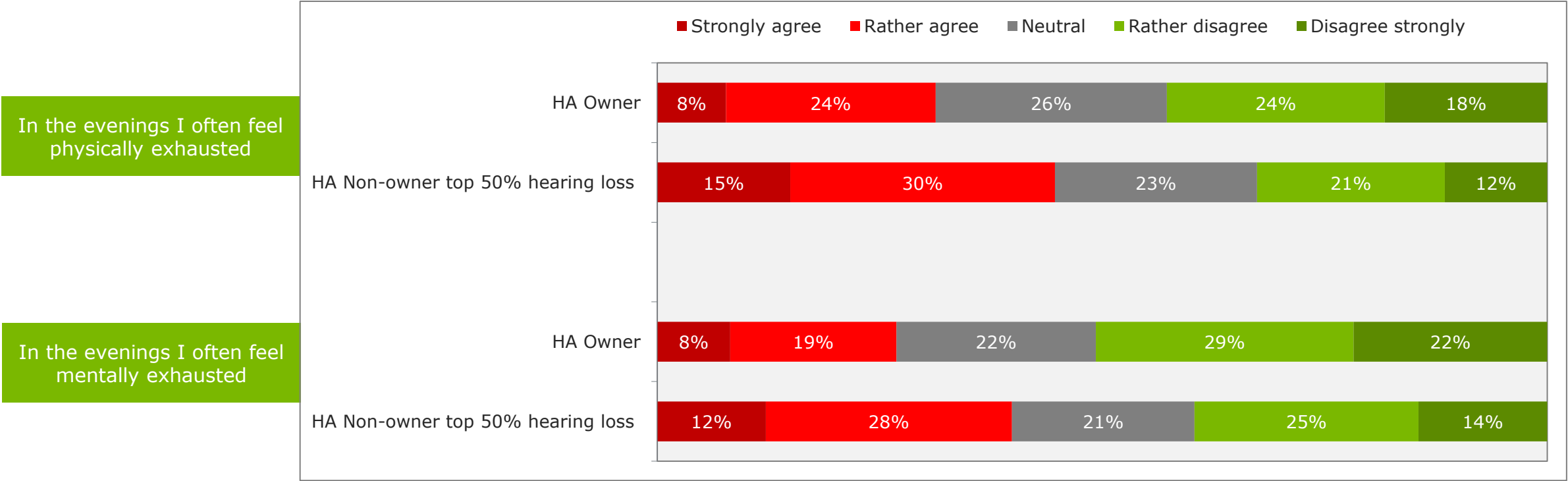
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC – like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

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





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



HA Owner n=437 / HA Non-owner top 50% hearing loss n=128

*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:

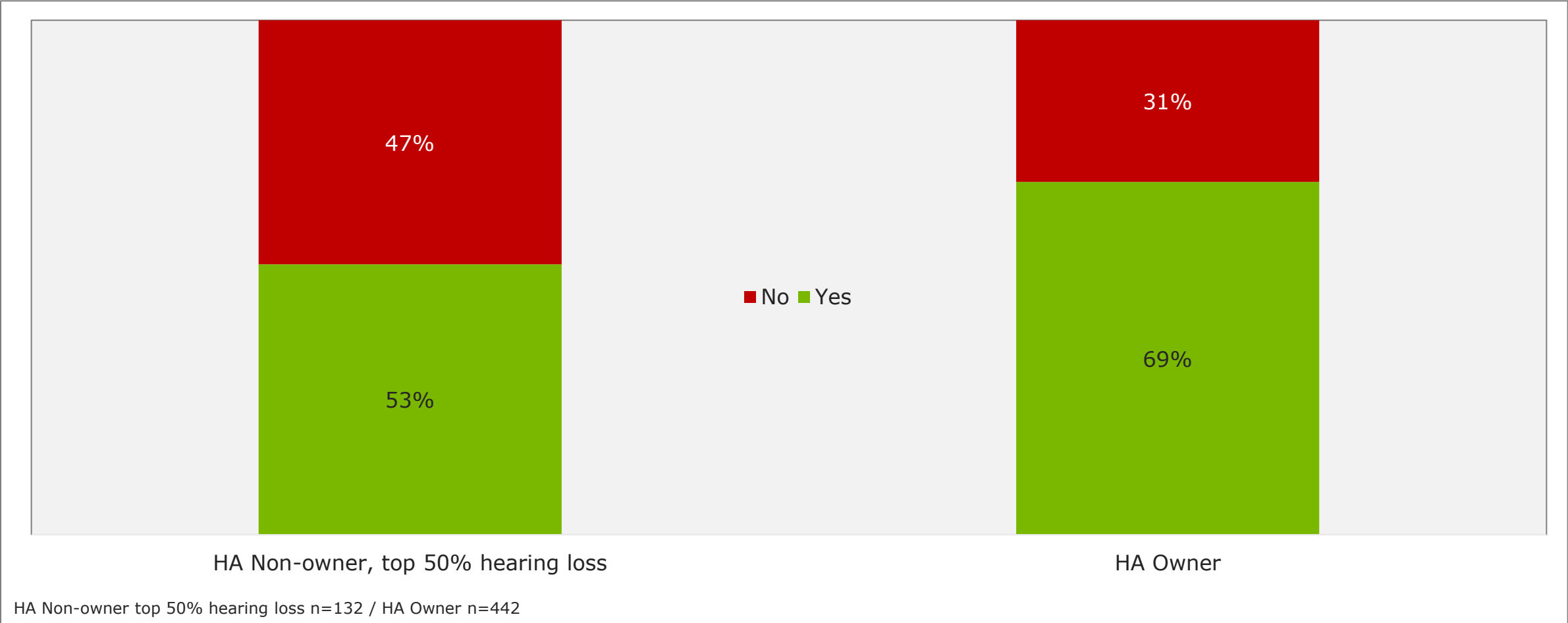
- Number of ears impaired (one or two)
 - Stated hearing loss (Mild to Profound)
 - Scores on 6 APHAB-EC – like questions (Scaled 1-5)
 - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67%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



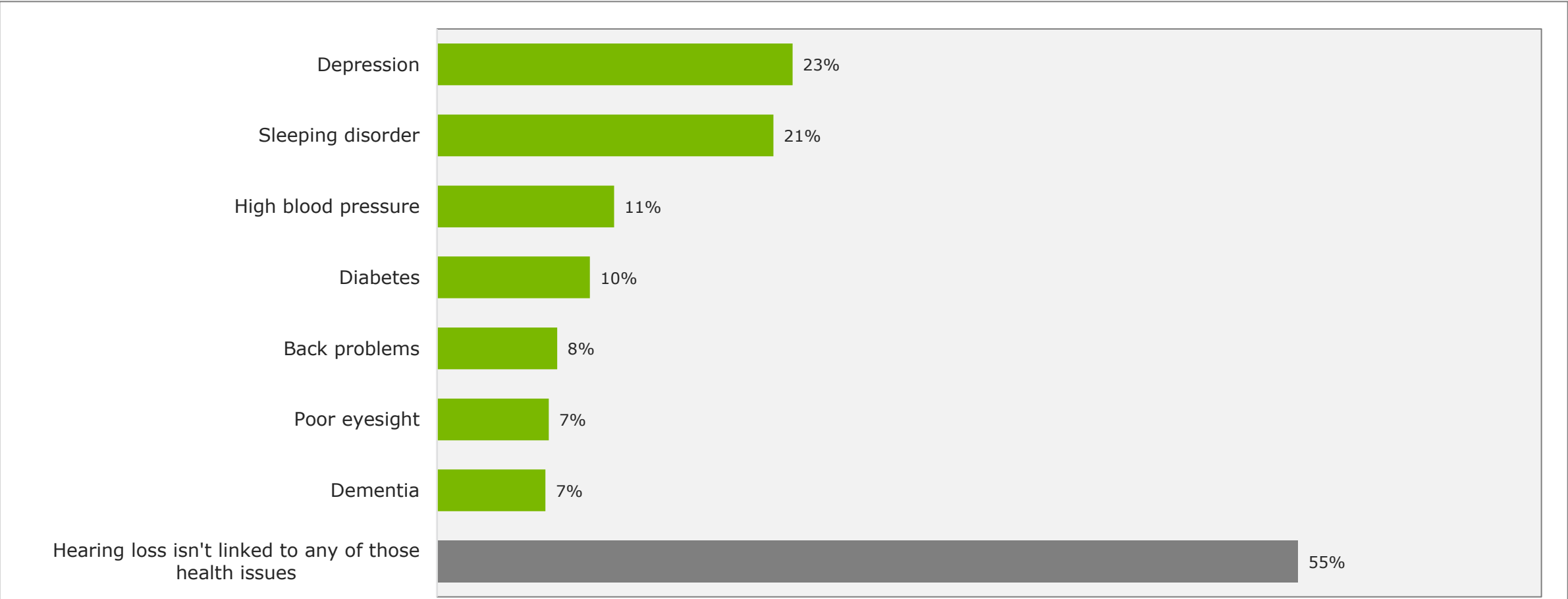
HA Non-owner top 50% hearing loss n=132 / HA Owner n=442





~25% of all hearing-impaired think that hearing loss could be linked to sleeping disorders and depression

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



Hearing impaired, n=1'297

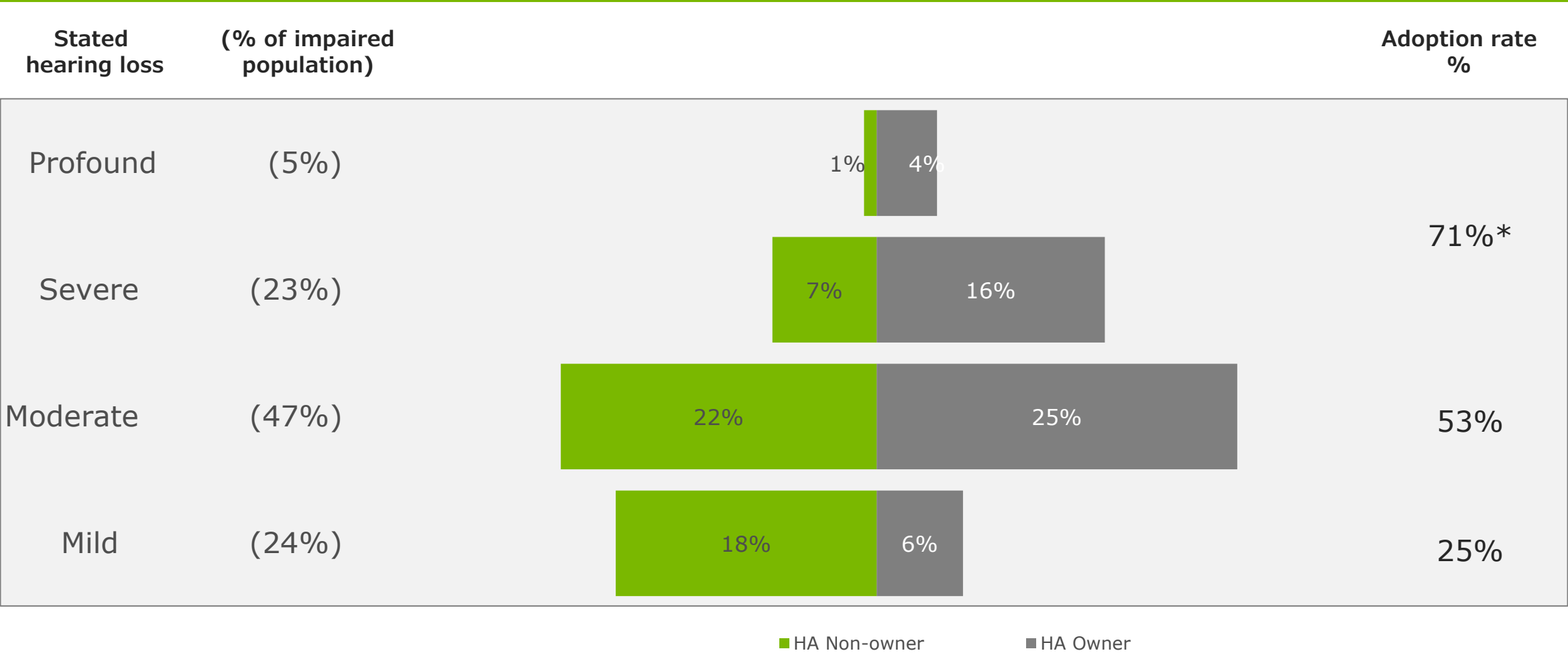


3. Analysis of hearing aid owners

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



Low adoption rates within mild hearing loss



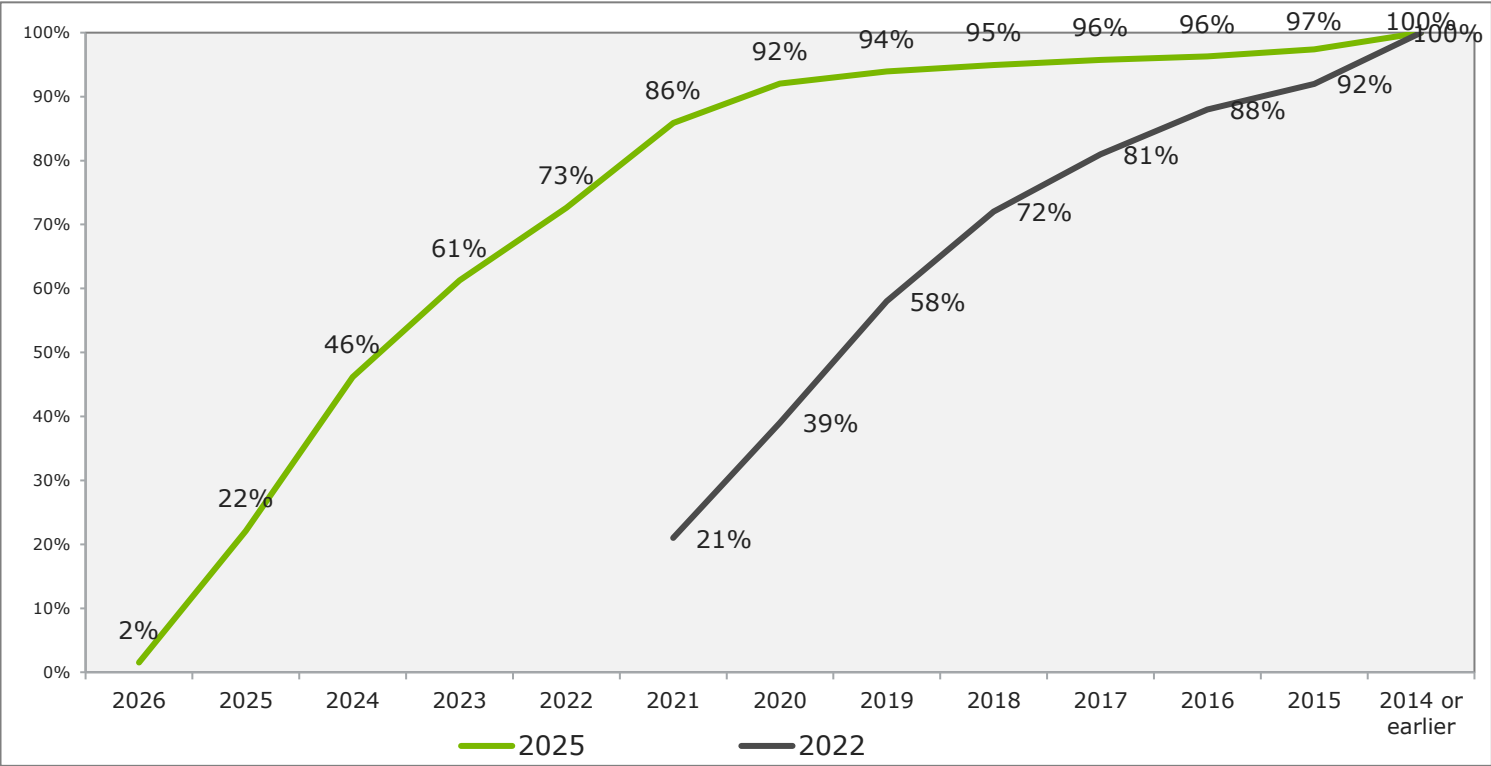
Sums can differ from 100% due to rounding
* combined "severe" and "profound" because n is too small





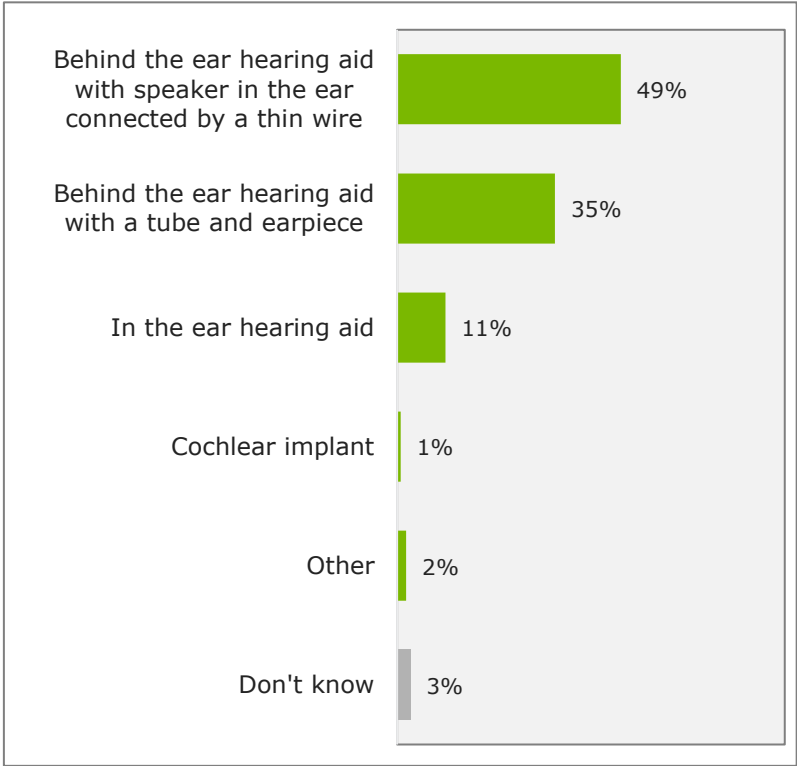
61% of the currently owned HAs were acquired in 2023 or later: RICs are the most often purchased type of HA

Year of purchase



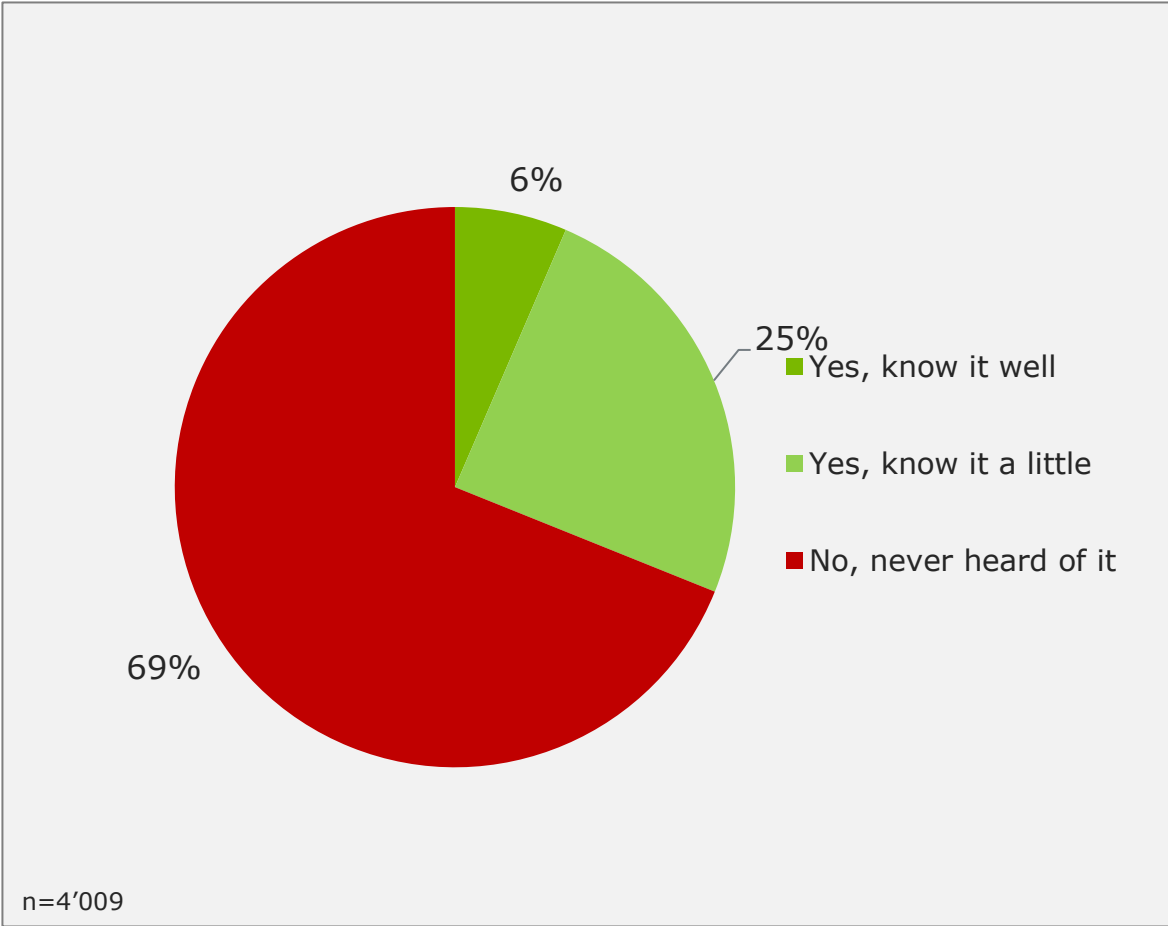
Age of currently owned HAs (Mean):
2026: 3.5 years
2022: 3.1 years

Type of HA

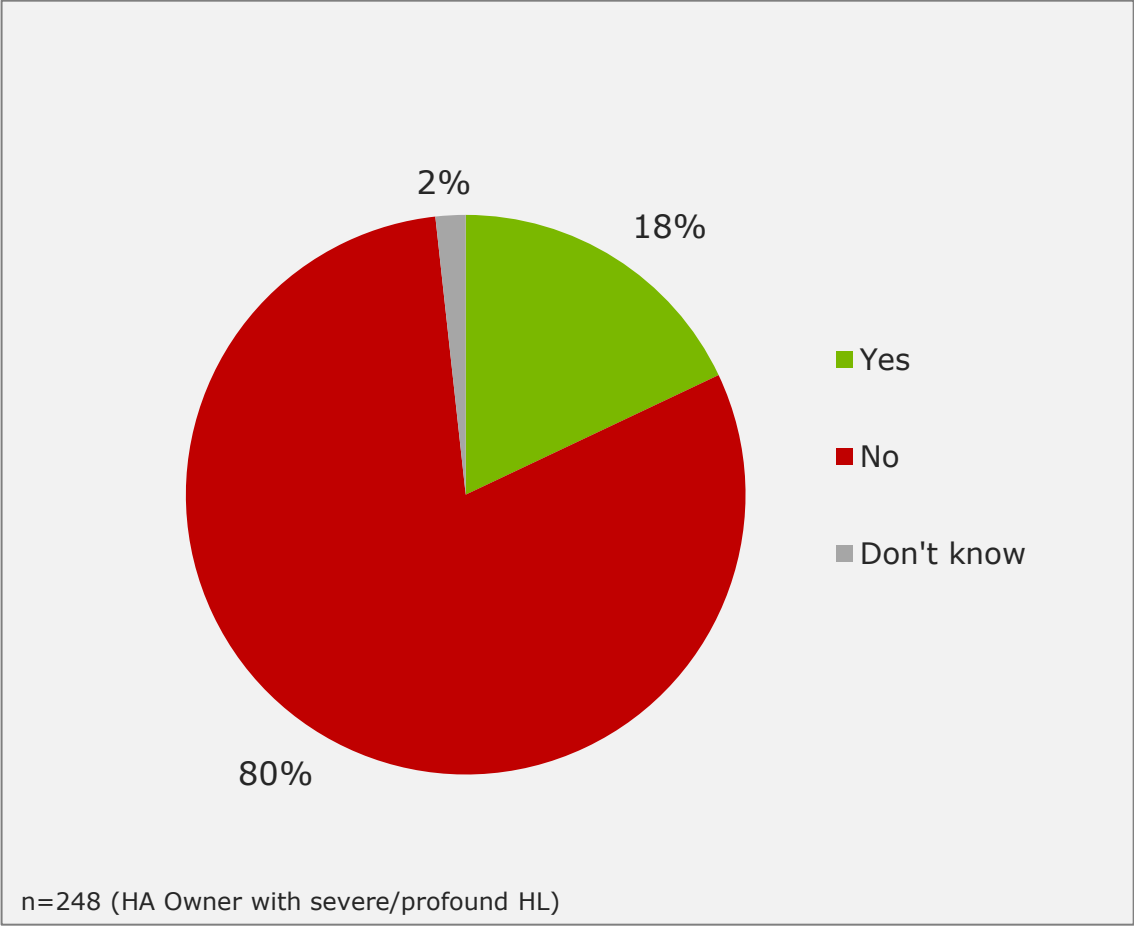


69% of the population has never heard of Cochlear Implants.
18% of the HA owners with severe/profound HL have been informed about CIs by a medical professional

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



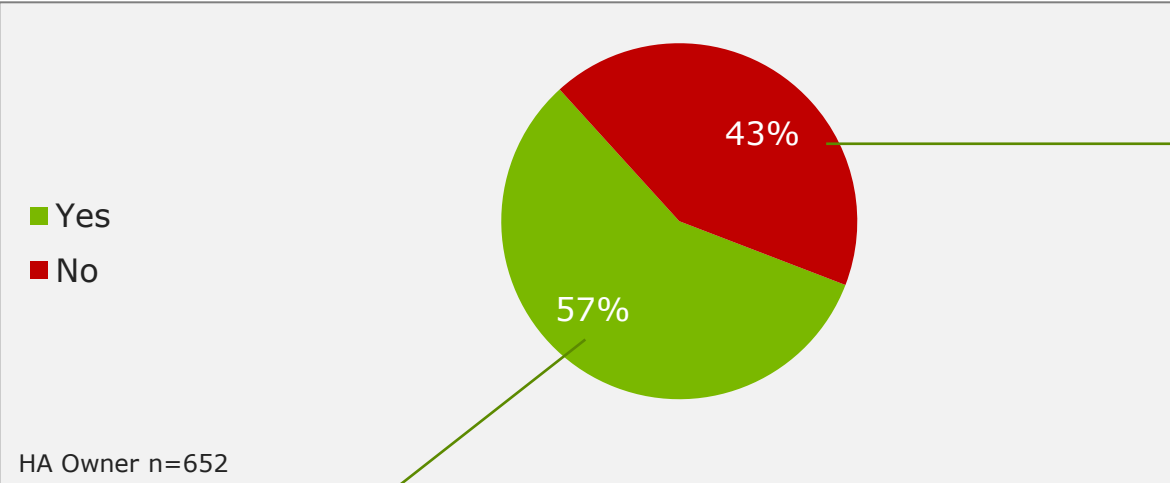
Have you been informed about cochlear implants by a medical professional?



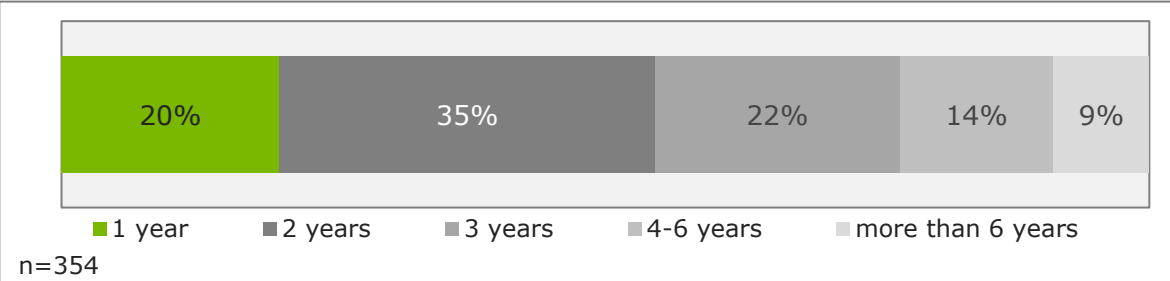


Hearing aids are used for five years before they are replaced. Mostly 2-6 years pass between becoming aware of the hearing loss and purchasing hearing aids

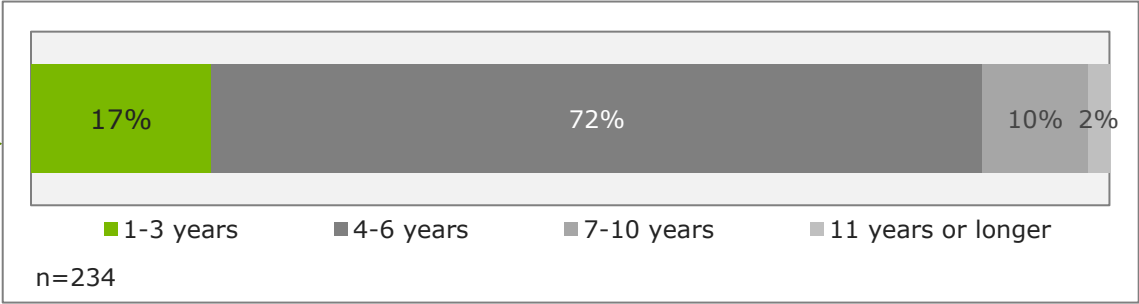
Current HAs = first HAs?



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

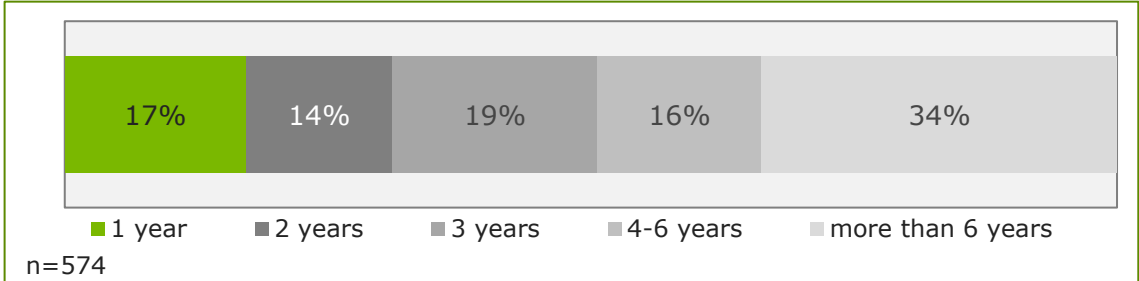


How many years did you own your previous HAs?



Age of HA before it has been replaced:
2026: 5 years (median)
2022: 5 years (median)

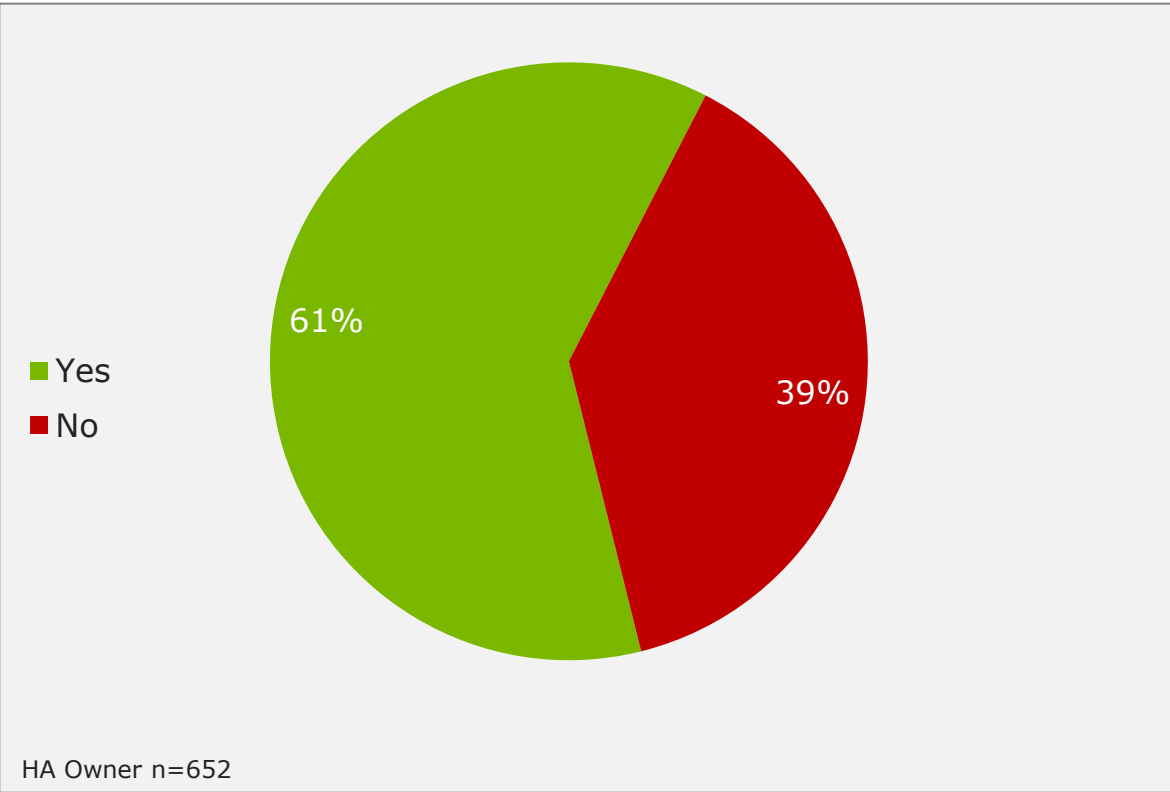
HA Non-owner:
How many years had passed since you became aware of your hearing loss?



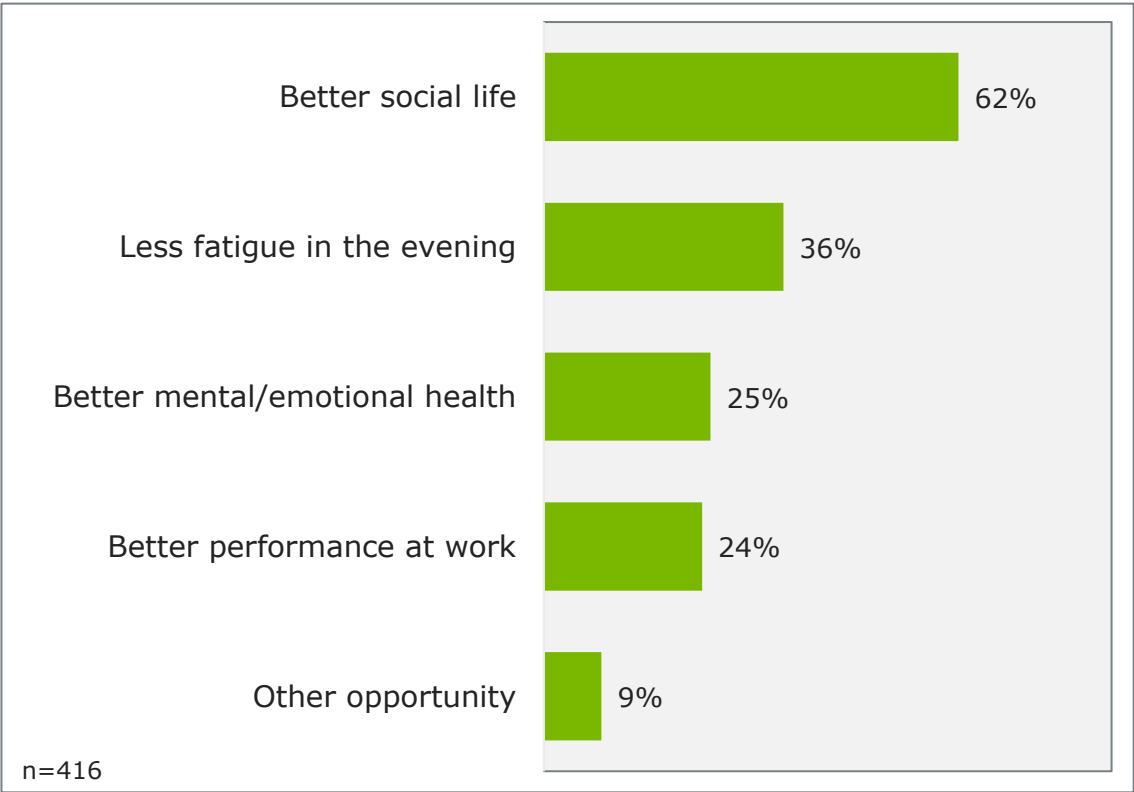


61% of all HA owners say they should have gotten hearing aids sooner because they missed out on social life and would have felt less fatigued in the evenings

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.

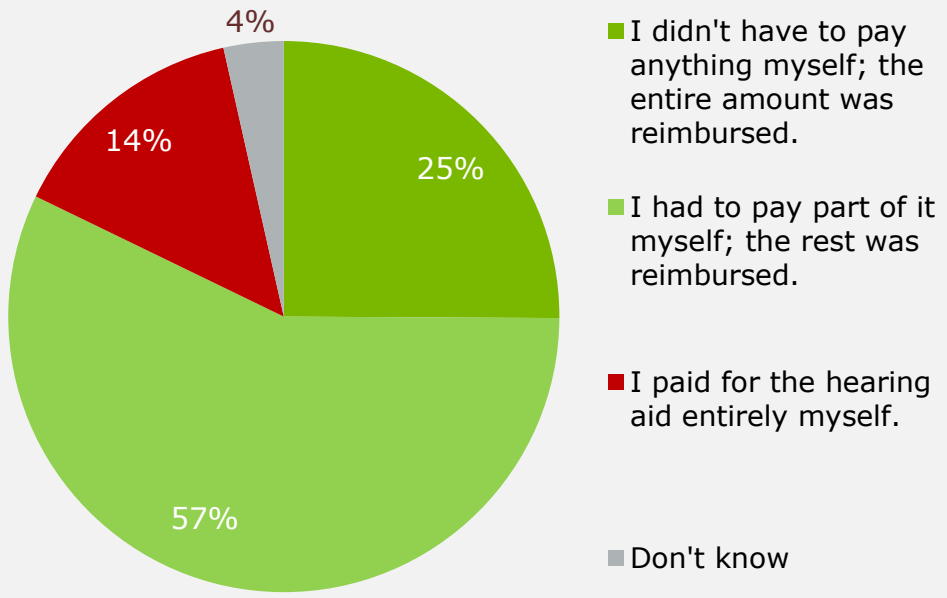




82% of the hearing aid owners received some kind of third party reimbursement.
A majority of hearing-impaired people without hearing aids don't know whether a third party would pay any part of the hearing aids

HA Owner:

How much did you pay for your hearing aid? (excluding the cost of any extras such as a drying box, cleaning kit, extra batteries, etc.)

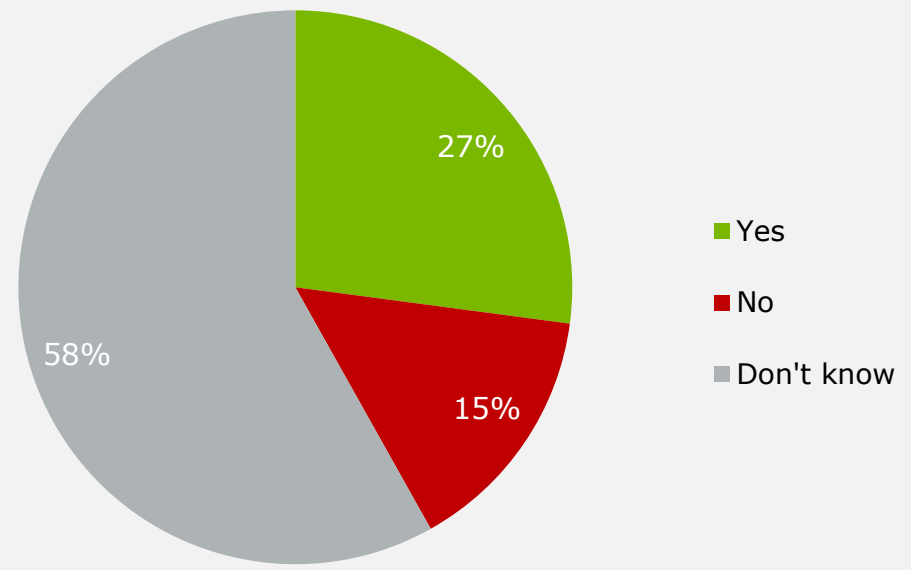


HA Owner n=652

Country specific question

HA Non-owner:

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



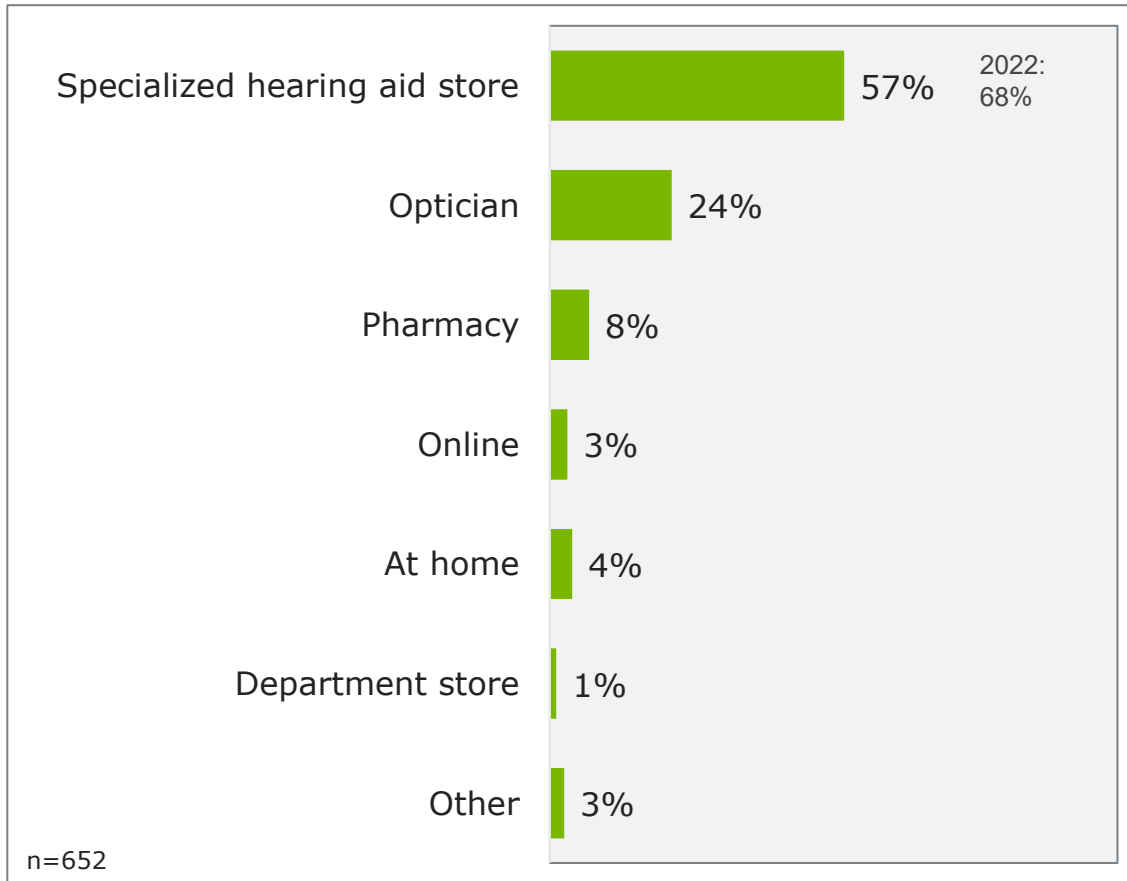
HA Non-owner n=645



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

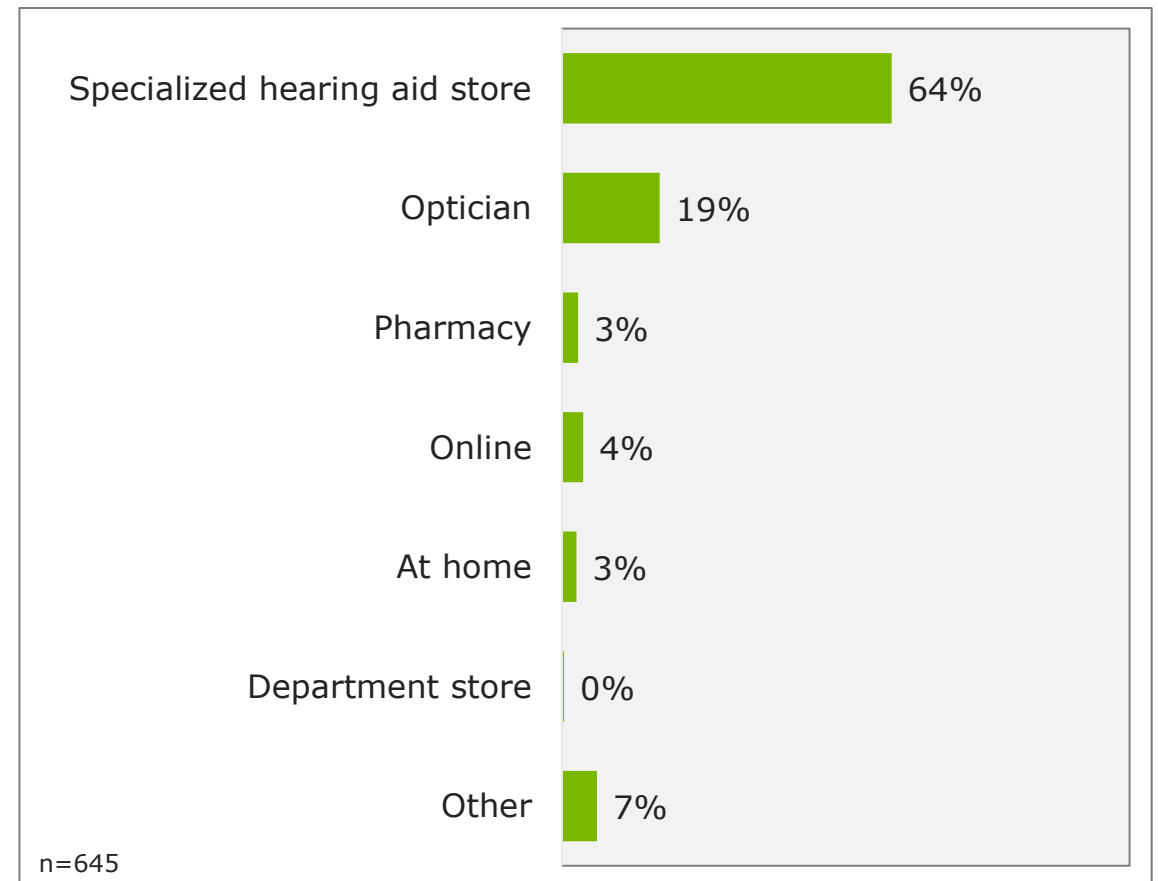
HA Owner:

Where was your most current hearing aid obtained?



HA Non-owner:

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



Most experienced some degree of choice when selecting their hearing aid

What degree of freedom did you experience in choosing your hearing aid?

None. I was prescribed a specific hearing aid by the ENT doctor/ Audiological Center

10%

None. I was prescribed a specific hearing aid by the hearcare professional

19%

I was able to choose from a limited range of hearing aids offered by the hearcare professional

30%

I feel like I was offered every possible solution by the hearcare professional and made the final decision myself

21%

The hearcare professional guided me towards a hearing instrument that fits my situation

15%

I already knew what hearing aid I wanted before my visit to the hearcare professional and made the final decision myself

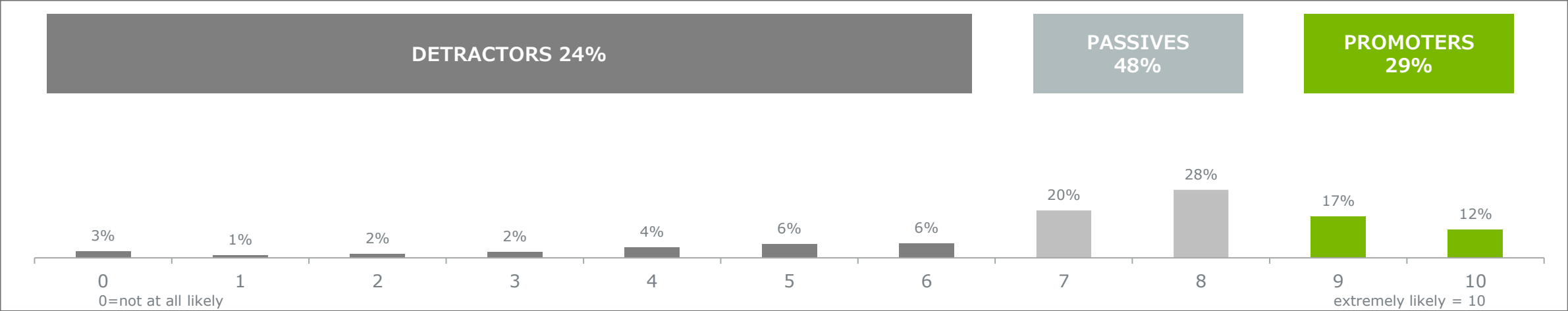
5%

n=652



Recommendation intention of the place where the hearing aid(s) have been obtained: Positive NPS score of 5

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 = 5 (2022: 11) (exact figure rounded)

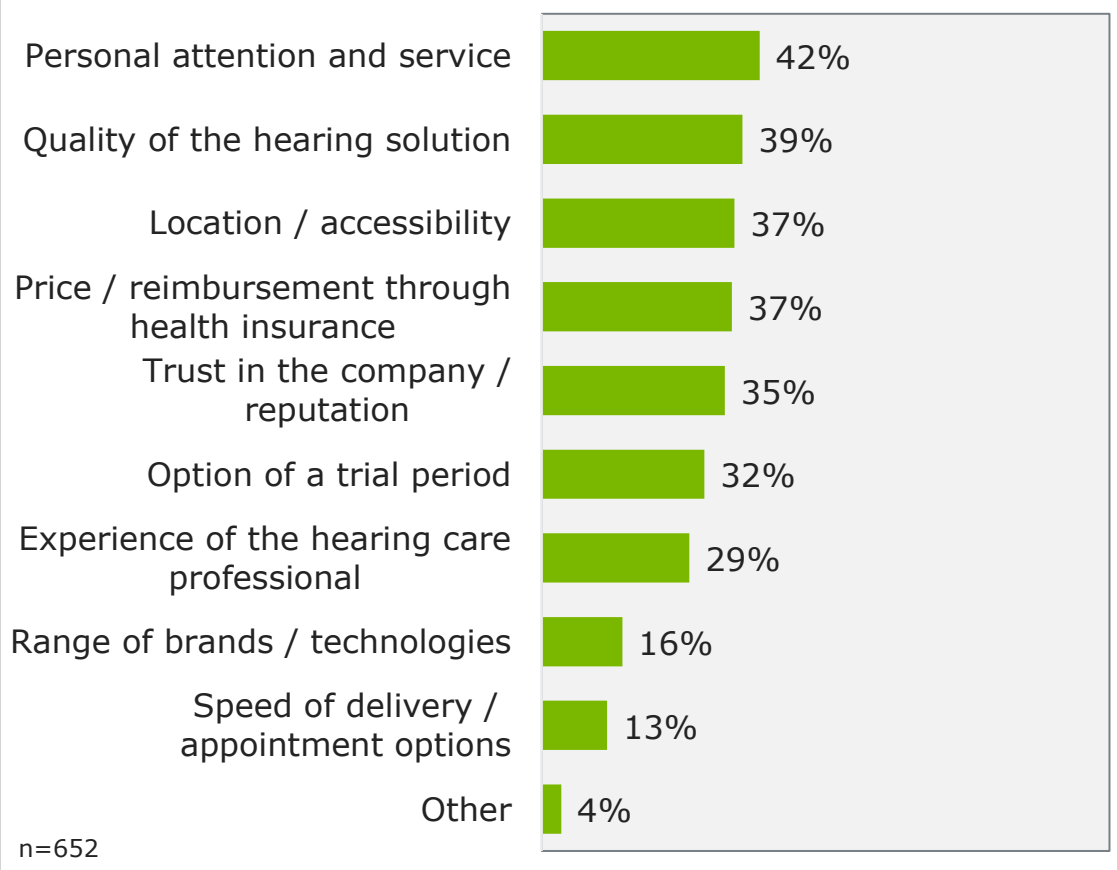


Decision drivers of provider choice differ: Owners prioritize personal attention, non-owners prioritize quality and price

HA Owner:

What would be a decisive factor for you in choosing your hearing aid company?

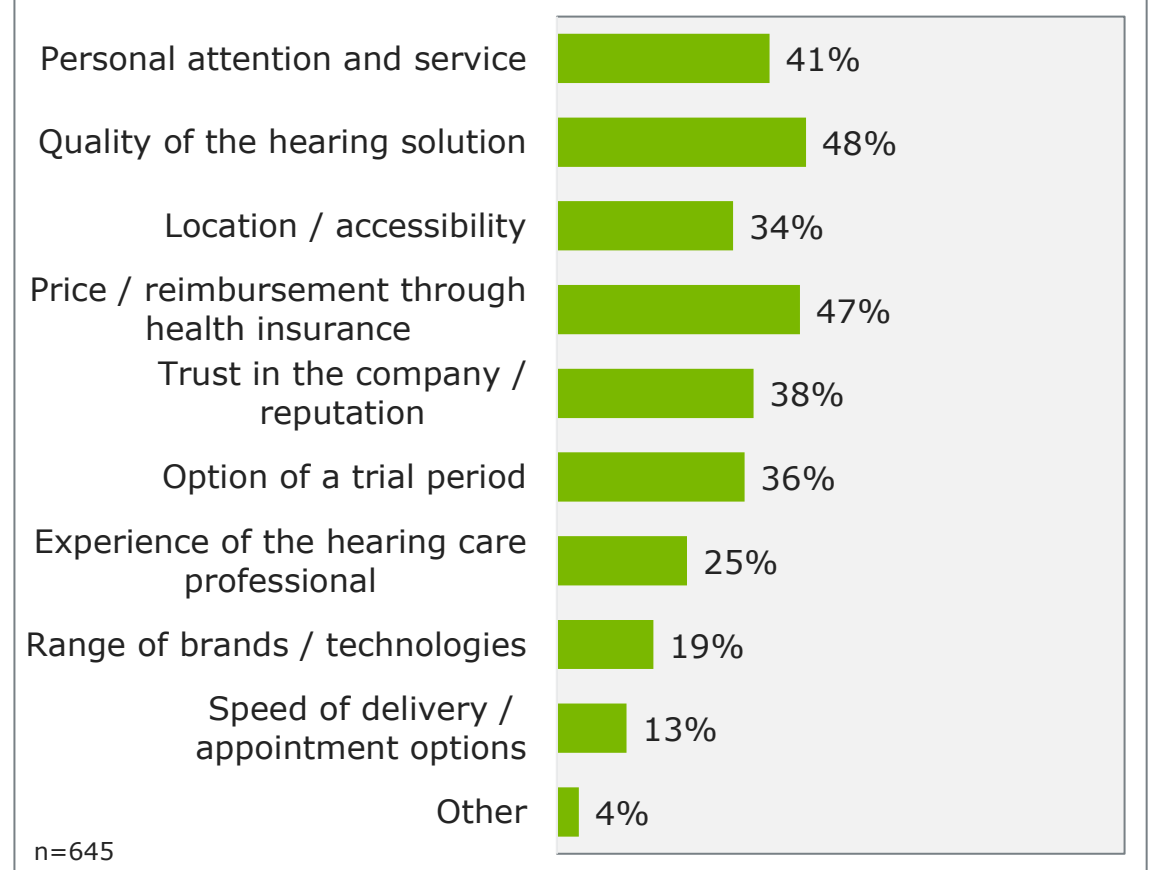
Wat zou voor u een doorslaggevende reden zijn om voor **uw** audicienbedrijf te kiezen?



HA Non-owner:

What would be a decisive factor for you in choosing your hearing aid company?

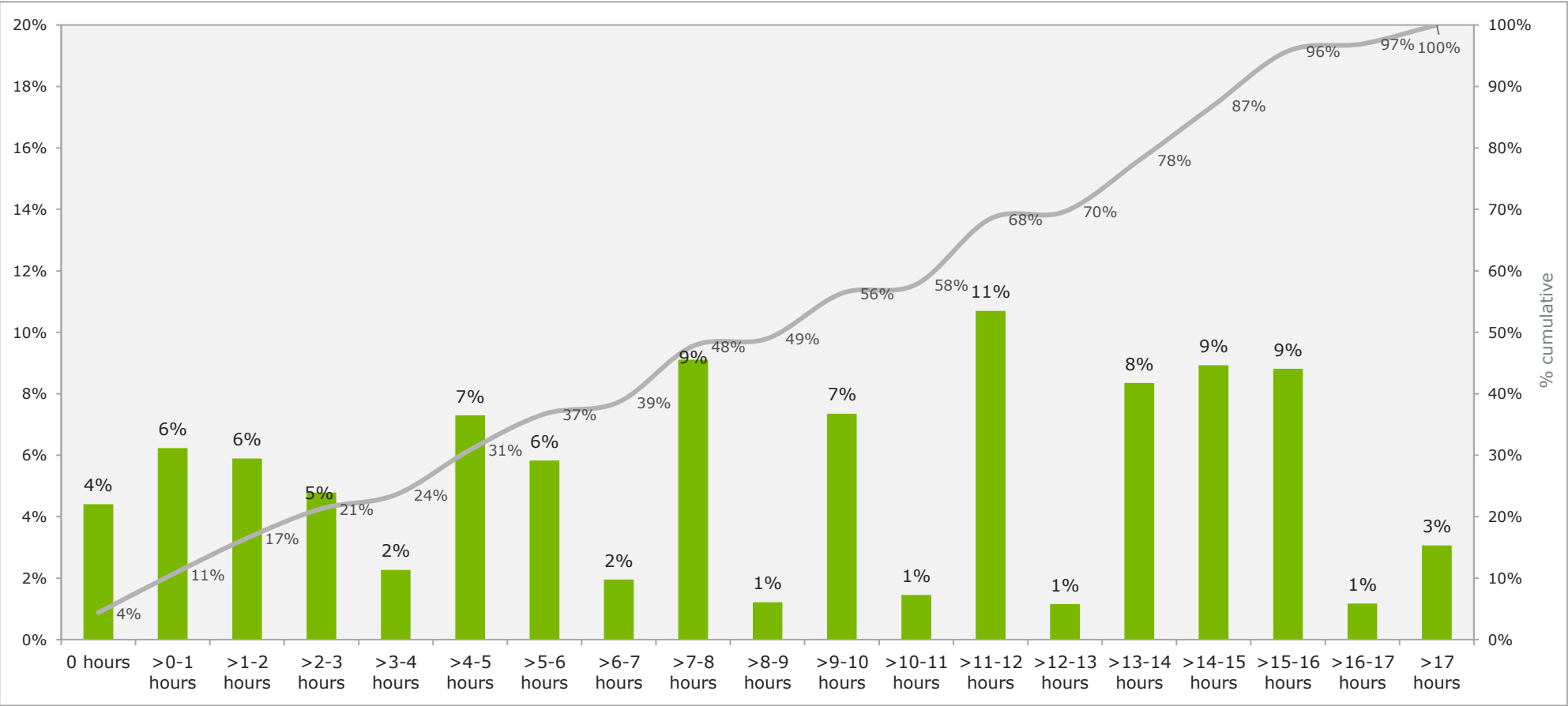
Wat zou voor u een doorslaggevende reden zijn om voor **een** audicienbedrijf te kiezen?





On average, HAs are worn 9.2 hours a day

How many hours a day are HA worn?



HA worn:
2026 Mean: 9.2 hours/day
2022 Mean: 8.6 hours/day

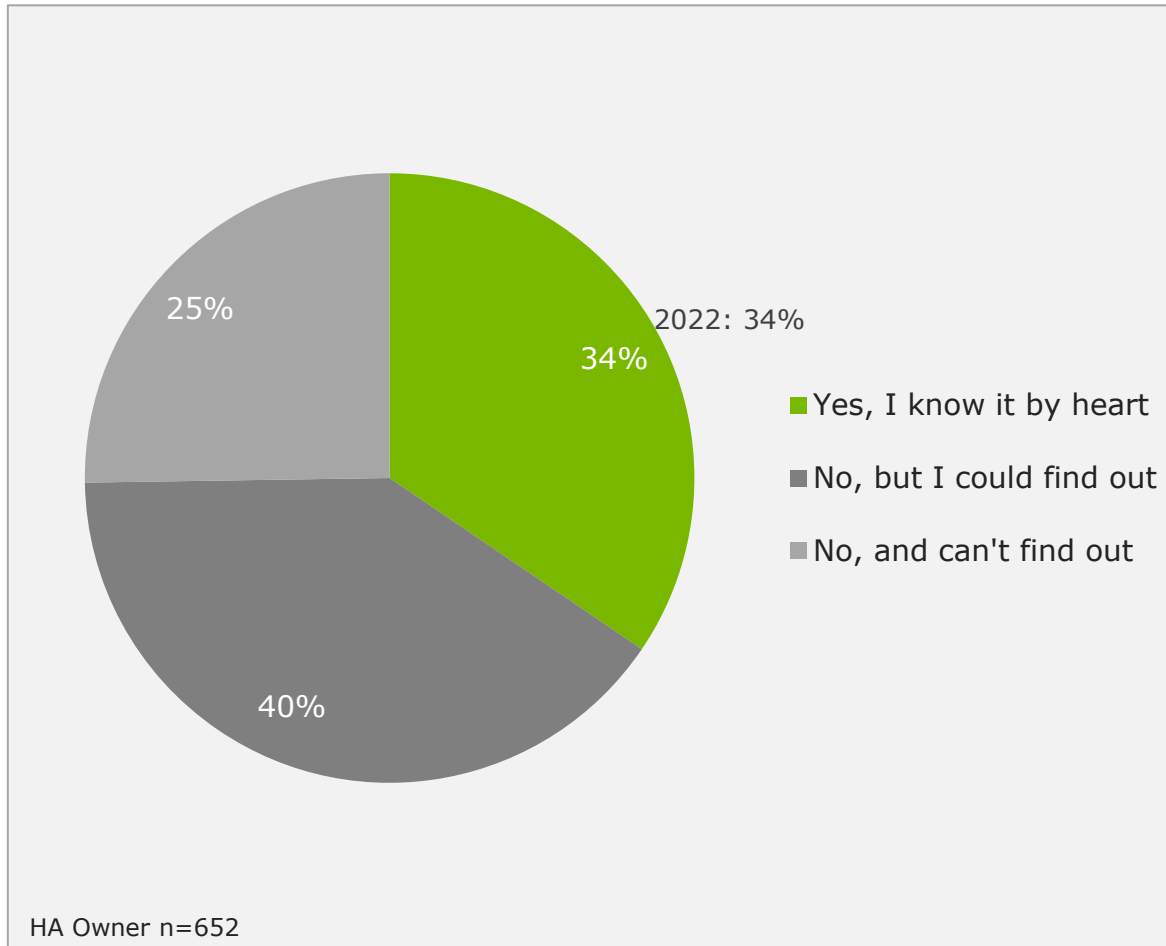
In the drawer (0 hours):
2026: 4%
2022: 5%

HA Owner n=652



34% of today's hearing aid owners are aware of their hearing aid brand

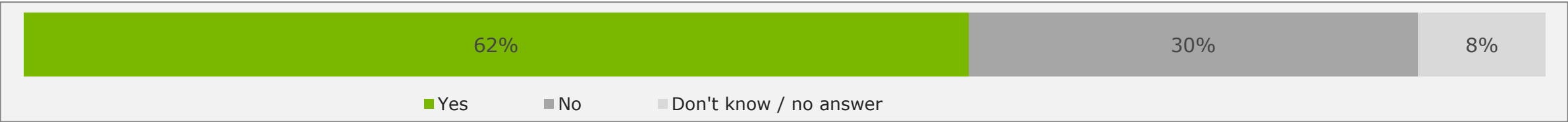
Are you aware of the brand of your hearing aid(s)?



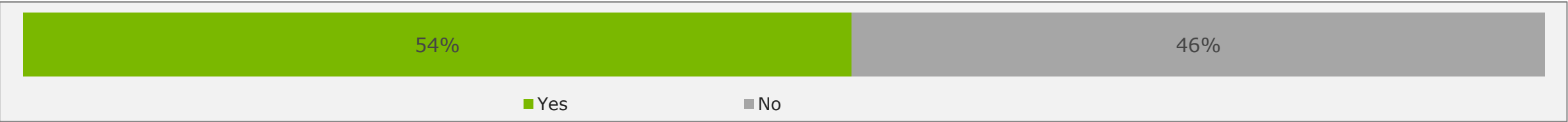


54% of the HA owners use a hearing aid app, and 69% of them are satisfied with it

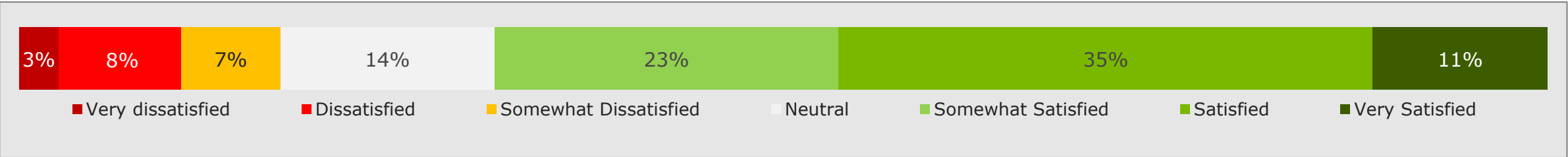
Have you been informed by your hearing care professional about hearing aid apps?
(HA Owner n=652)



Do you personally use apps for your hearing aids?
(HA Owner n=652)

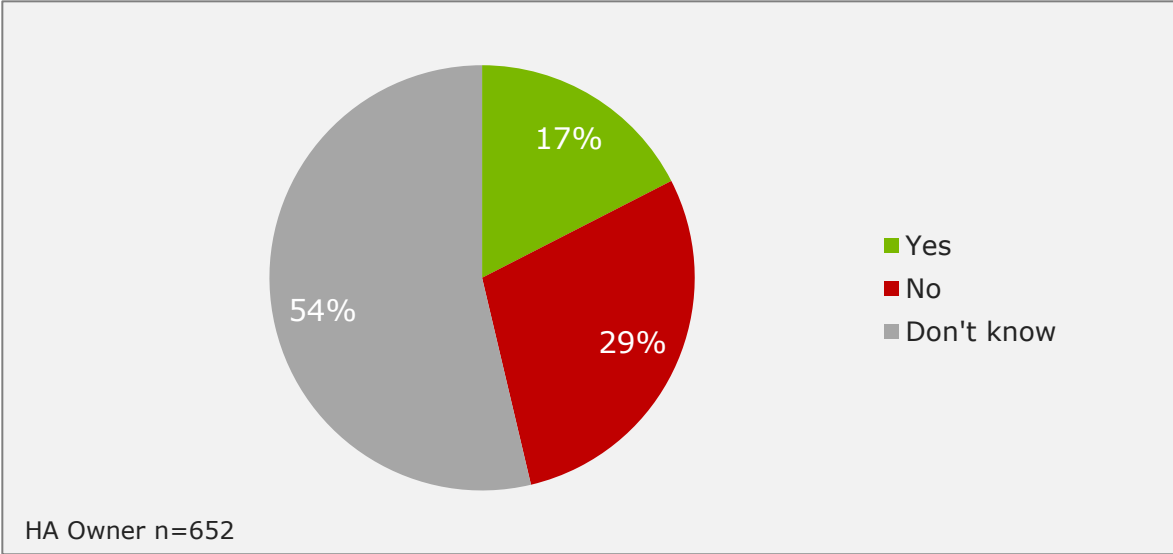


IF APPS USED (n=363):
Overall, how satisfied with the performance of your apps?

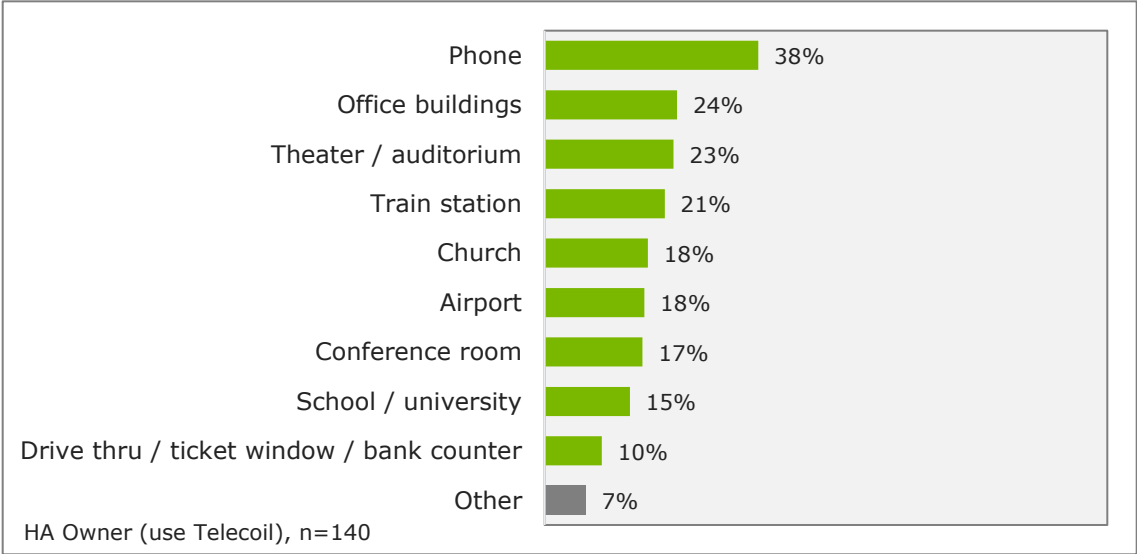


17% of HAs are (to the owners' knowledge) equipped with Telecoil

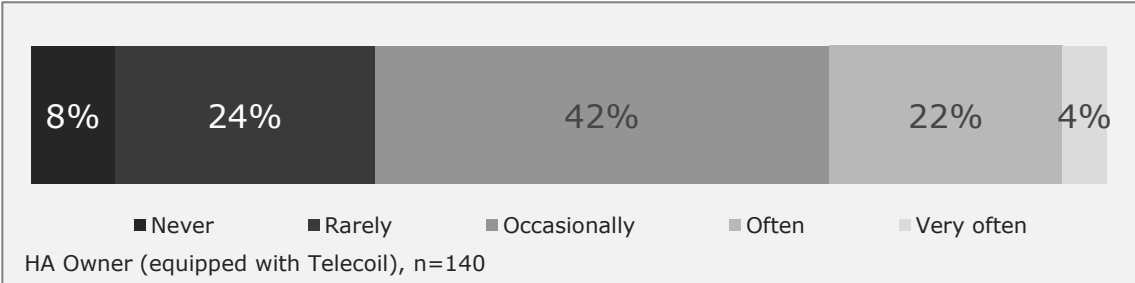
Are your hearing aids equipped with Telecoil?



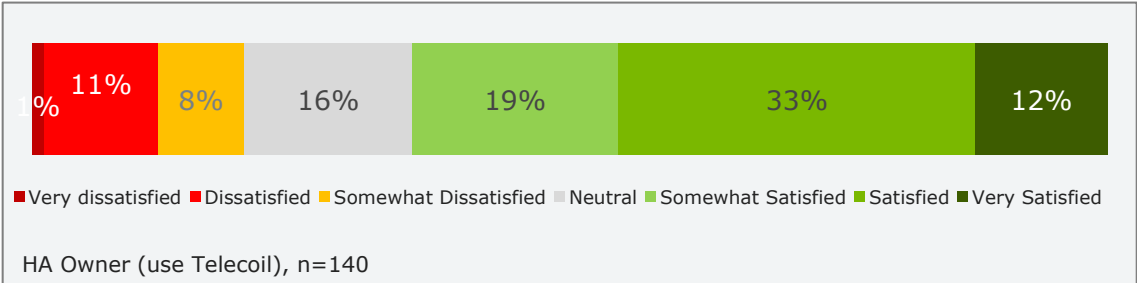
Where do you use your telecoil to improve your hearing?



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



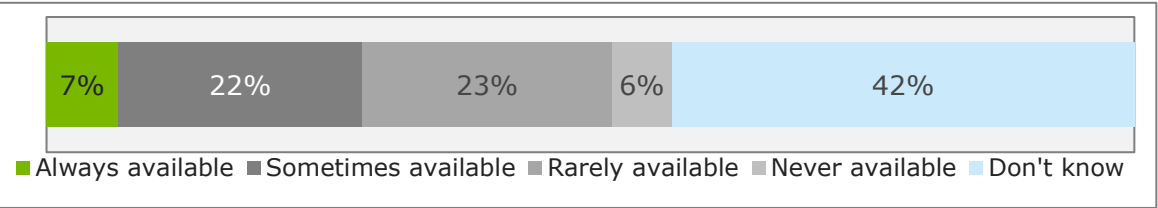
How satisfied are you with the telecoil option?



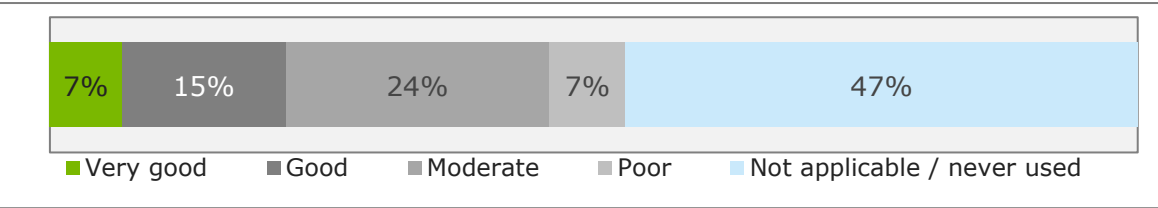
Accessibility and functionality of hearing support in public buildings remain limited, with high non-use

HA Owner n=652:

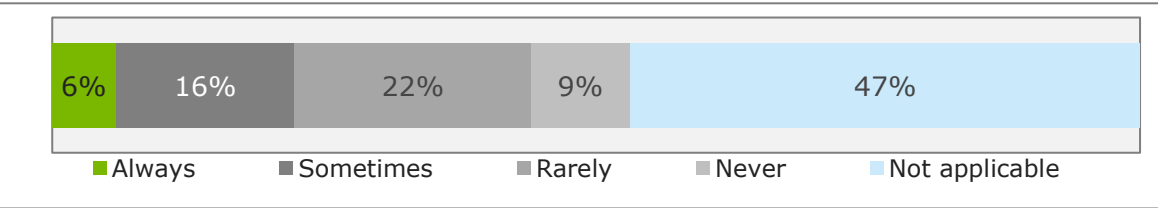
How accessible do you find public buildings for people with hearing impairments (induction loops, FM, infrared, Wi-Fi audio, Auracast)?



Functionality of aids in public buildings:



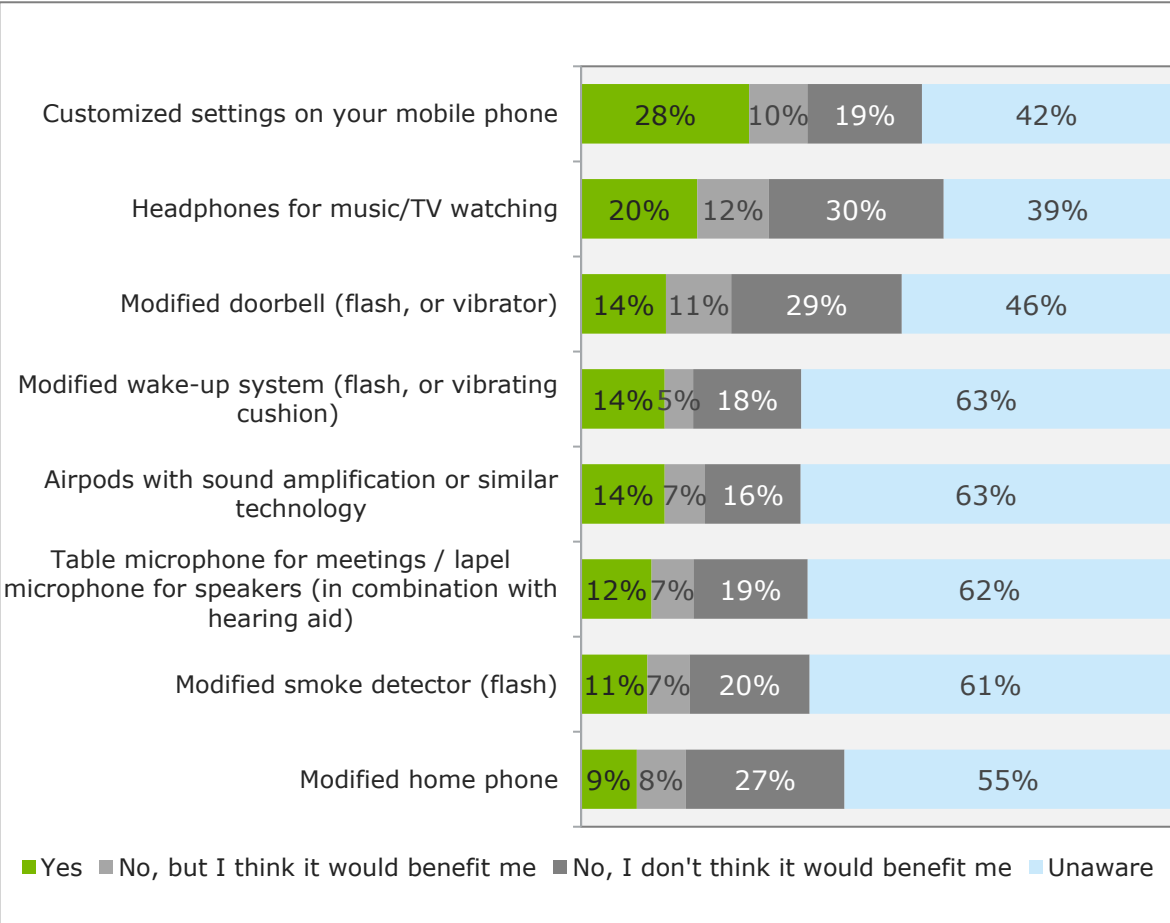
Use of aids in public buildings:



Overall uptake of assistive solutions remains limited – mobile phone settings are most commonly used and HA owners show higher usage than non-owners

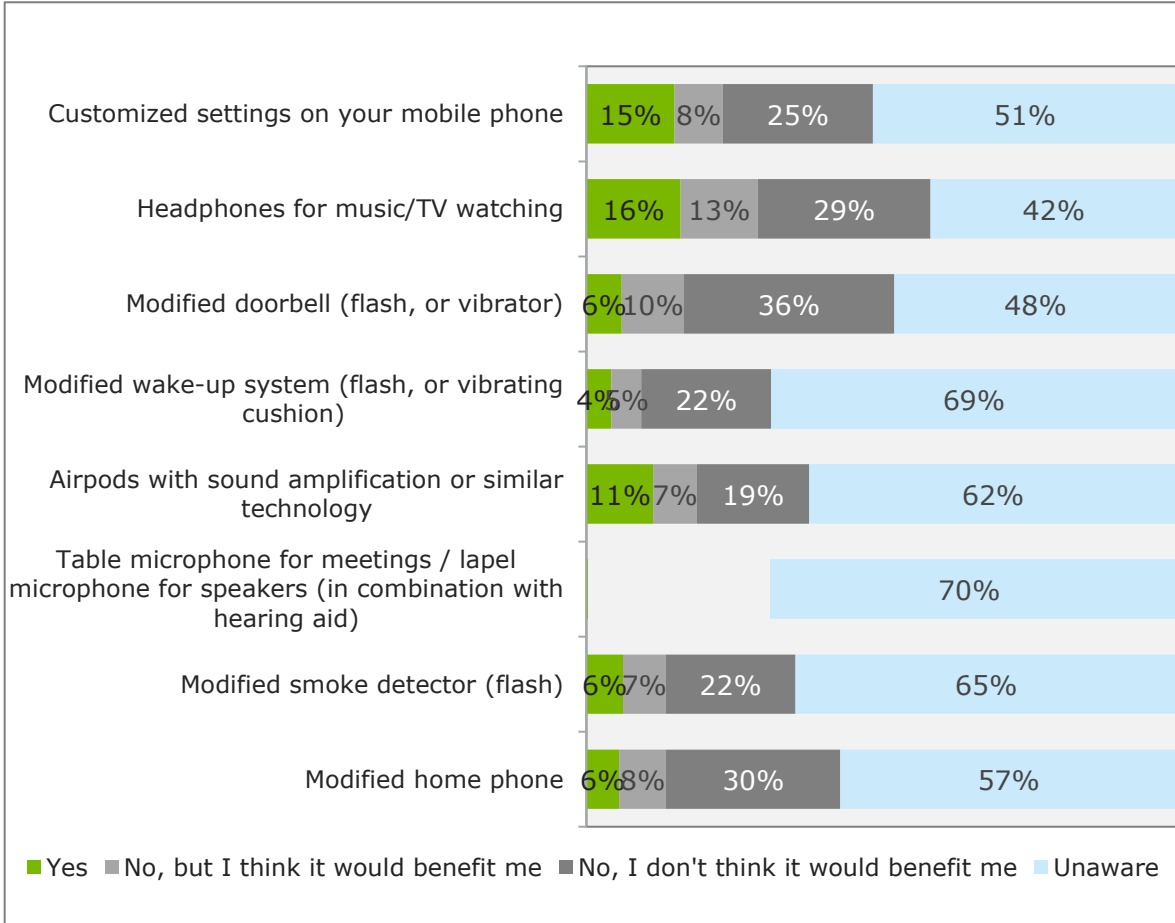
HA Owner: n=652

Do you use one or more of these solutions?



HA Non-owner: n=645

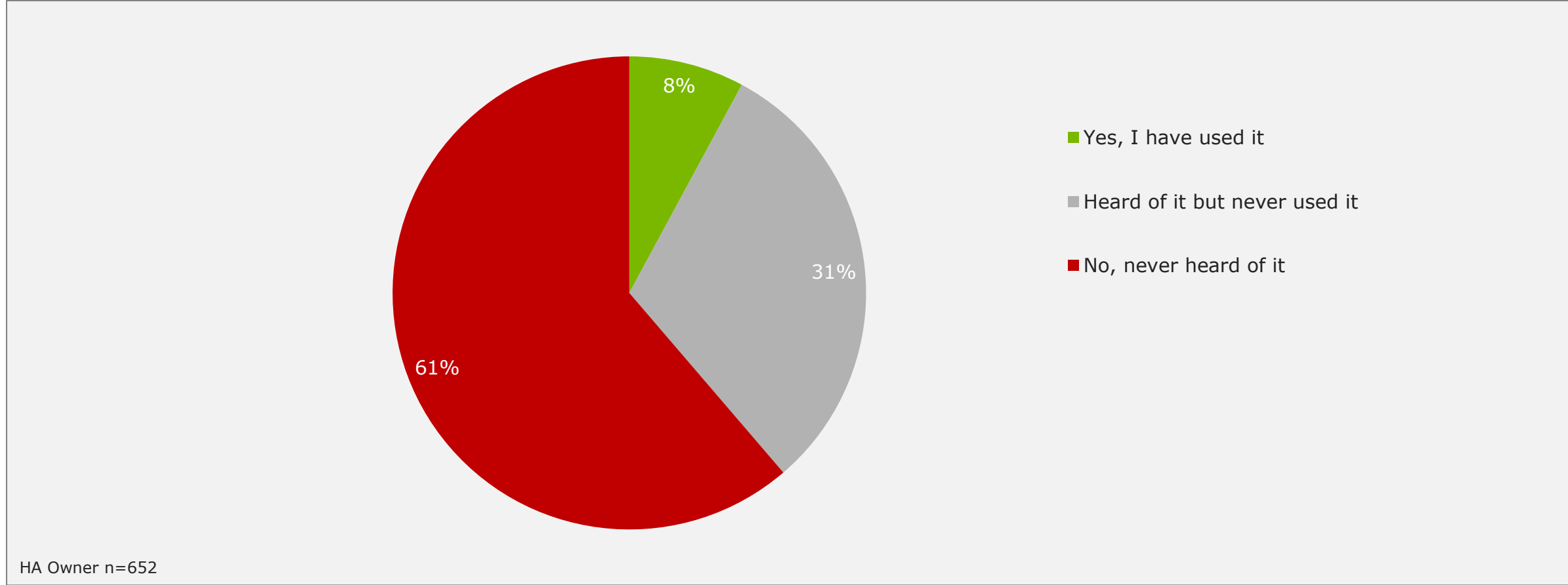
Do you use one or more of these solutions?





8% of the HA owners have already used remote fitting, 31% have at least heard of it, and 61% have never heard of it

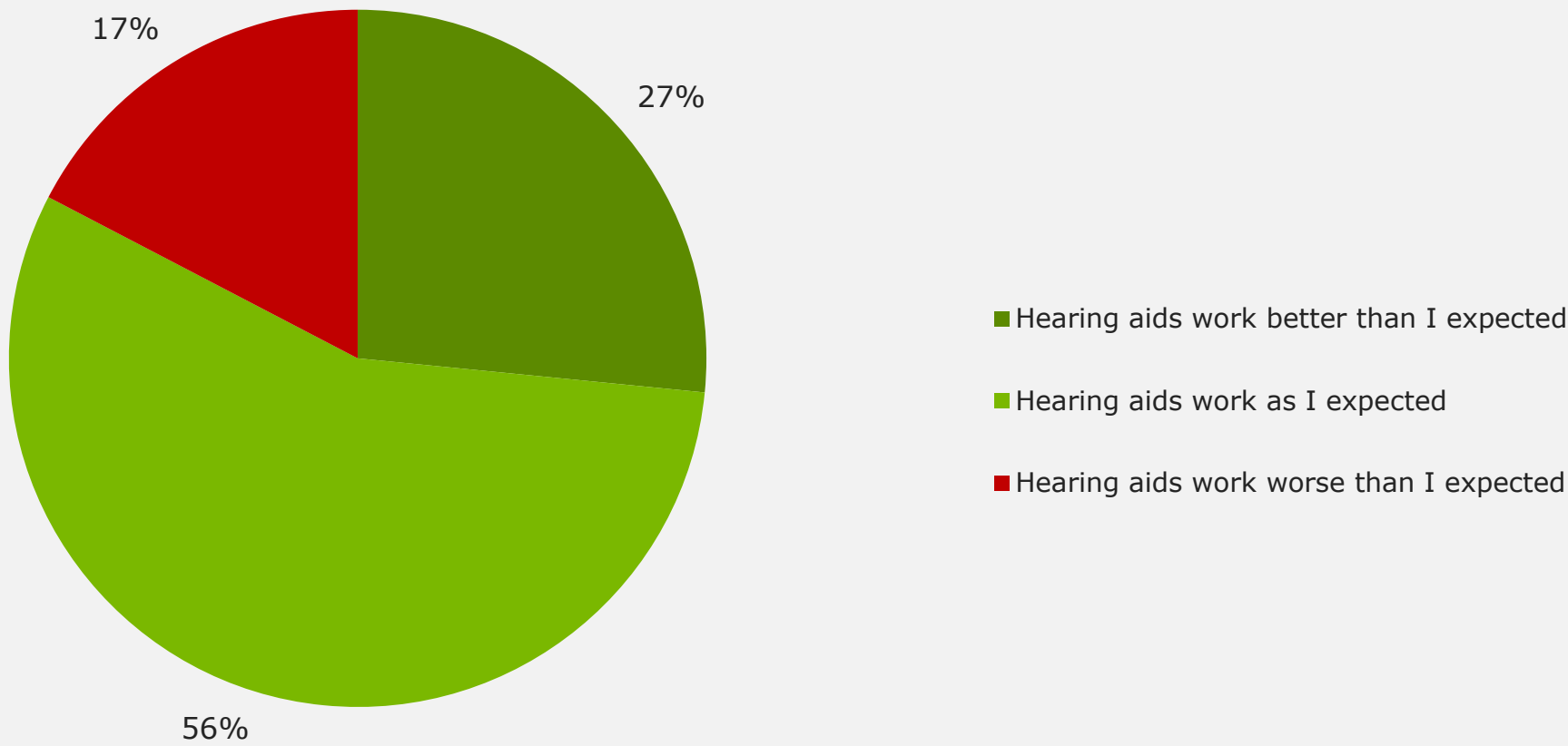
Have you ever heard of Remote fitting for your hearing aids?
(Remote fitting: enables your hearing care professional to fit and fine-tune hearing aids from a distance (in real-time via video chat via an app), so that you don't need to leave your house to get your hearing aids adjusted)



Satisfaction with hearing aids and drivers, Importance of listening situations

83% of hearing aid owners say their hearing aid works better than or as expected

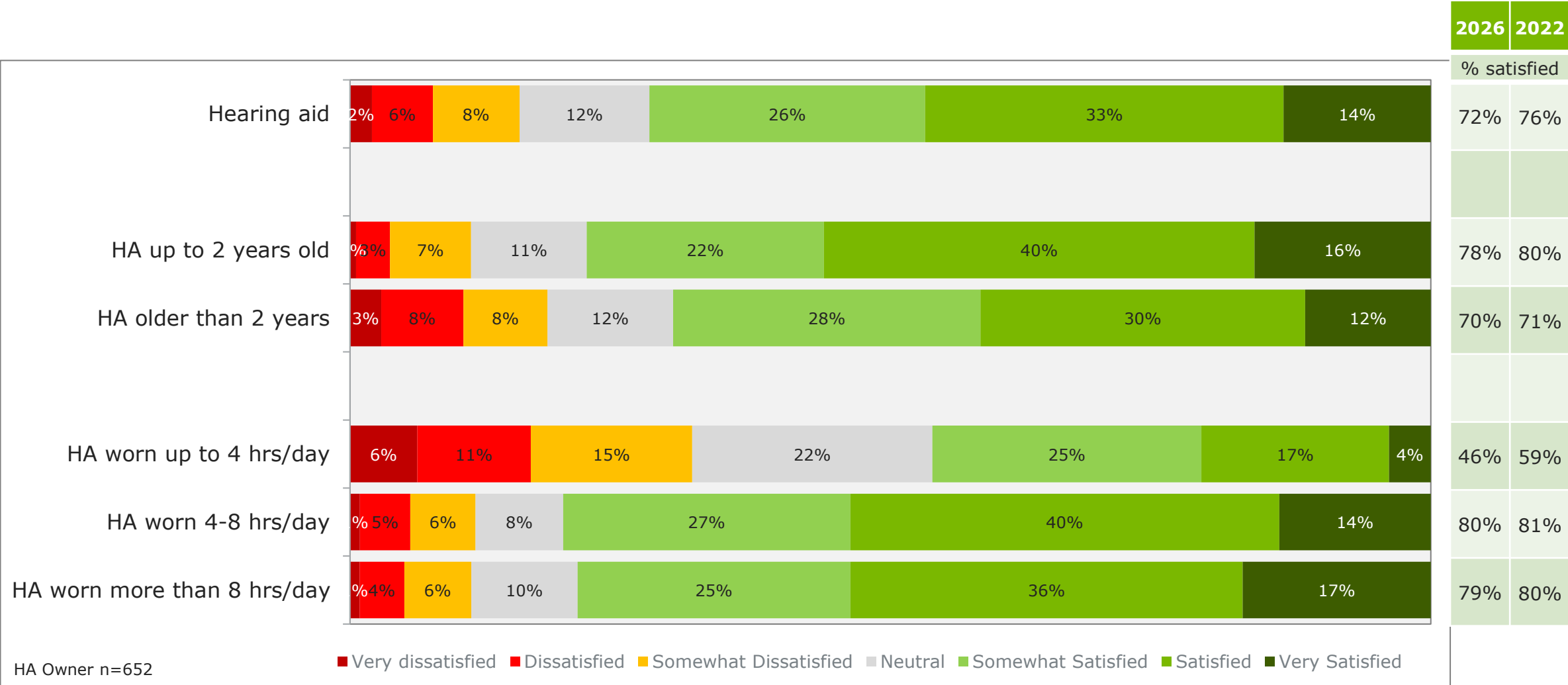
How have the expectations you had towards hearing aids before trying them on for the first time been met?



HA Owner n=652



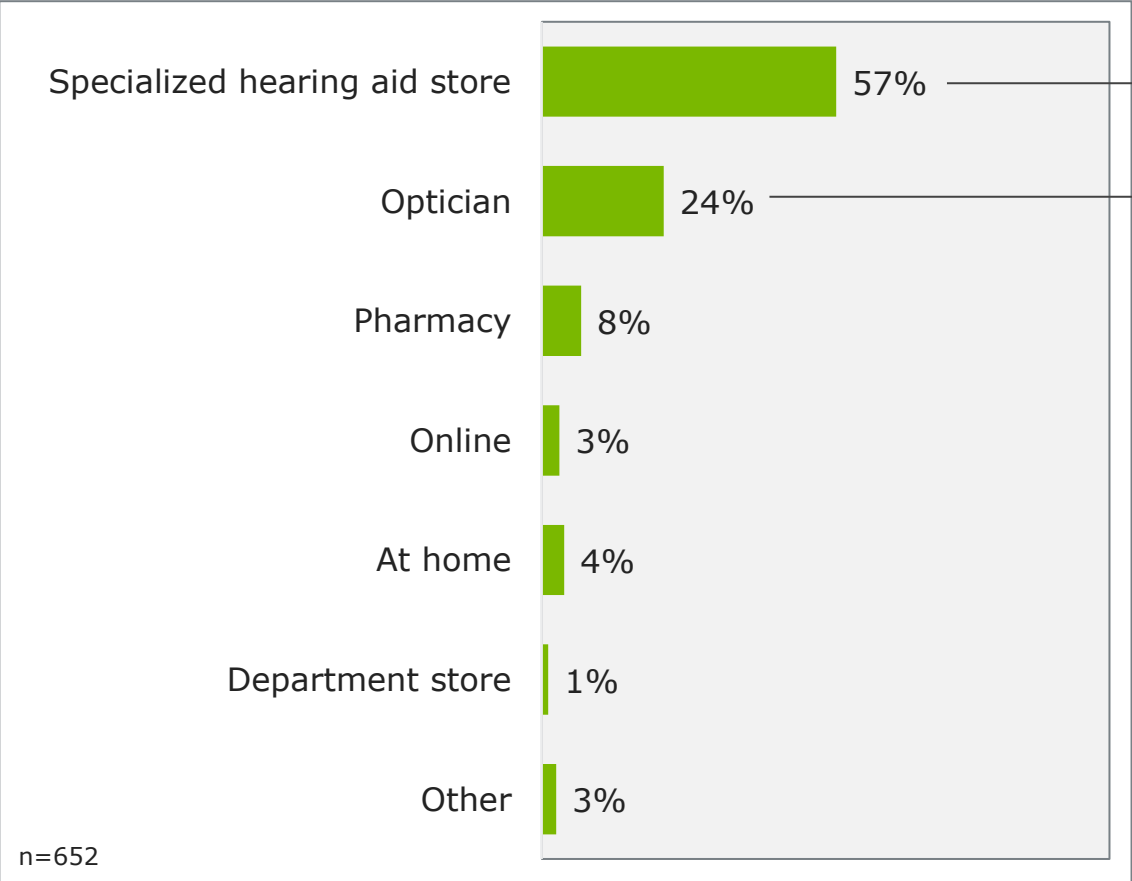
Overall satisfaction with HA: 72% of hearing aid owners are satisfied with their hearing aid(s)



Those who had their hearing aids fitted in a hearing aid store are more satisfied

HA Owner:

Where was your most current hearing aid obtained?

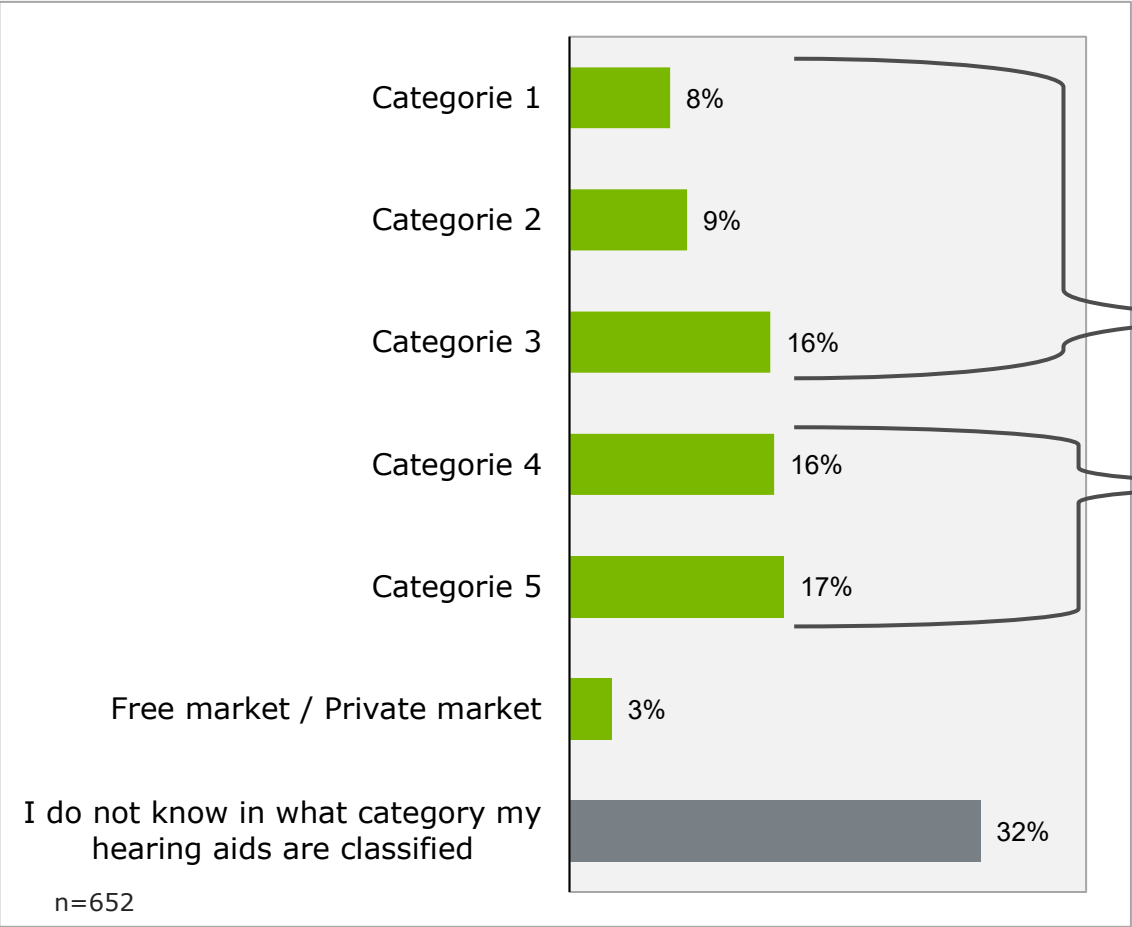


	% satisfied with HA	Avg wear per day in hours
n=361	78%	10.6
n=152	71%	8.5

n=645

Category-related differences in satisfaction and wear time, with the private market indicating the highest levels

In which category does the hearing aid you have purchased fall?*



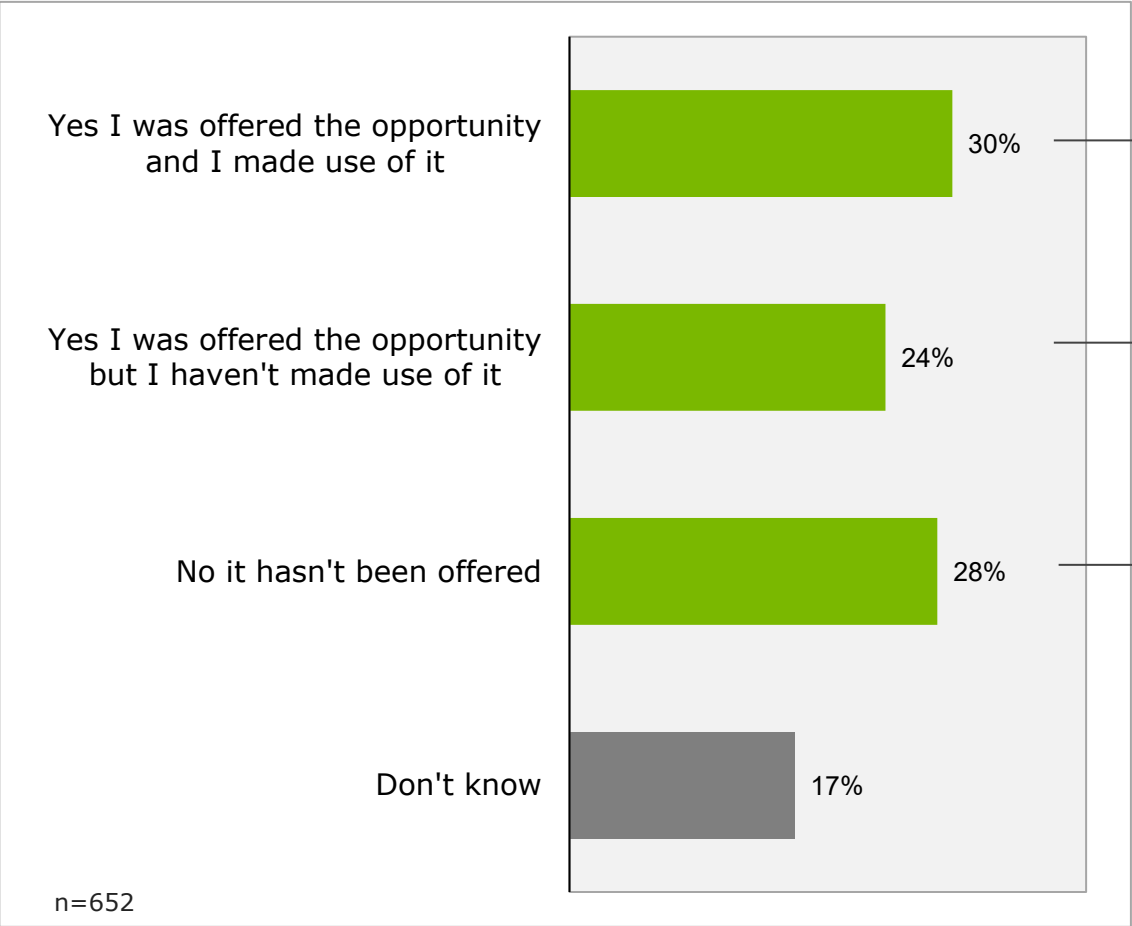
HA	% satisfied with HA	Avg wear per day in hours
Cat 1-3 n=218	70%	8.1
Cat 4-5 n=219	71%	9.7
Private n=24	85%	11.9

*In the Dutch hearing aid market, hearing aids are classified into five categories. A category 1 hearing aid is intended for simple hearing losses. Category 5 contains hearing aids that can compensate for a more complex hearing loss. In addition to these five categories, there are hearing aids that do not fall into one of these categories. These hearing aids belong to the so-called free market (also known as the private market).



Those who were offered the option to pay extra but did not use it are the least satisfied

Pay extra: Have you made use of this option?*



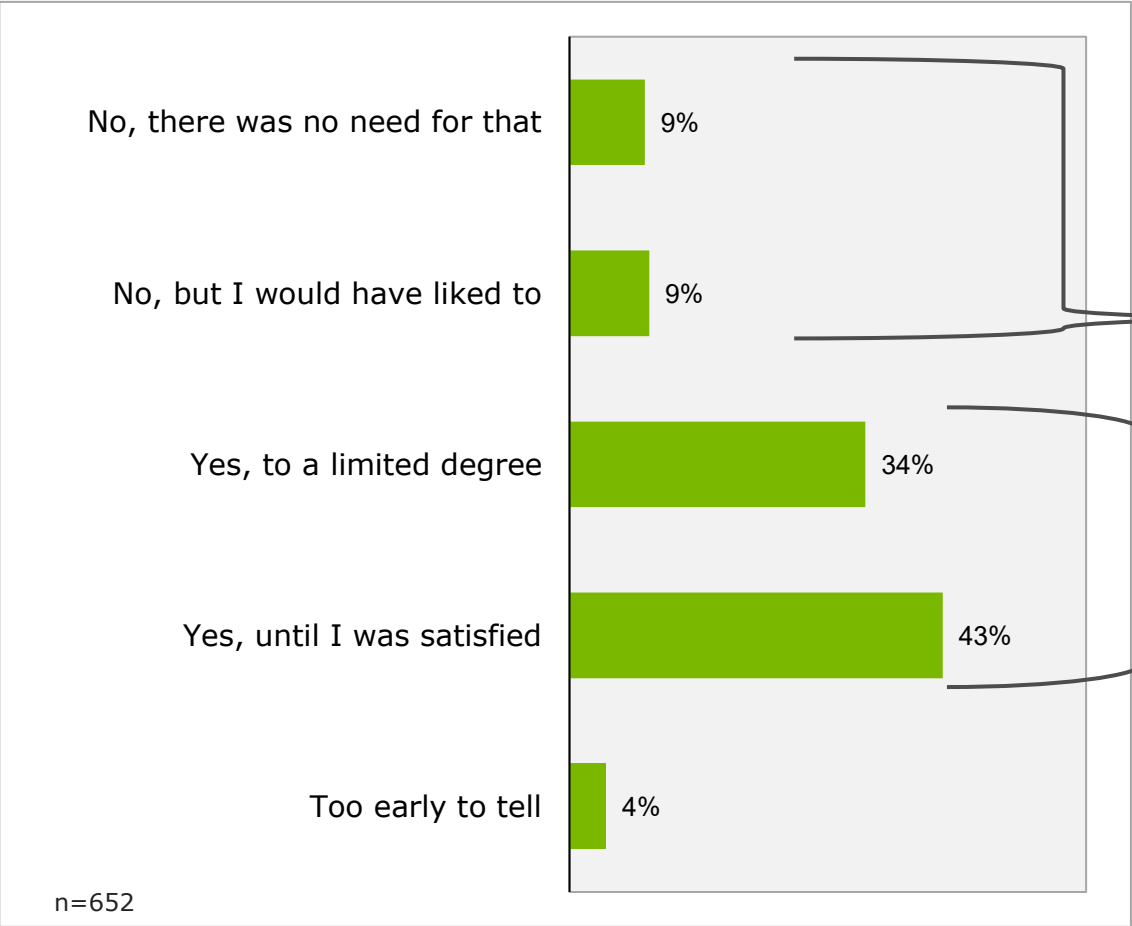
	% satisfied with HA	Avg wear per day in hours
n=213	75%	8.7
n=157	67%	8.7
n=172	75%	10.1

*In my choice for a hearing aid, I was able to make use of the option to pay extra. By paying extra, we mean the option to choose a hearing aid from a higher category than you are entitled to from the health insurer and to pay the difference yourself. Some health insurers allow you to pay the difference yourself.



Aftercare strongly associated with higher satisfaction and longer daily wear time

Did you have any evaluations /checkups regarding your hearing aids after you had made the purchase?

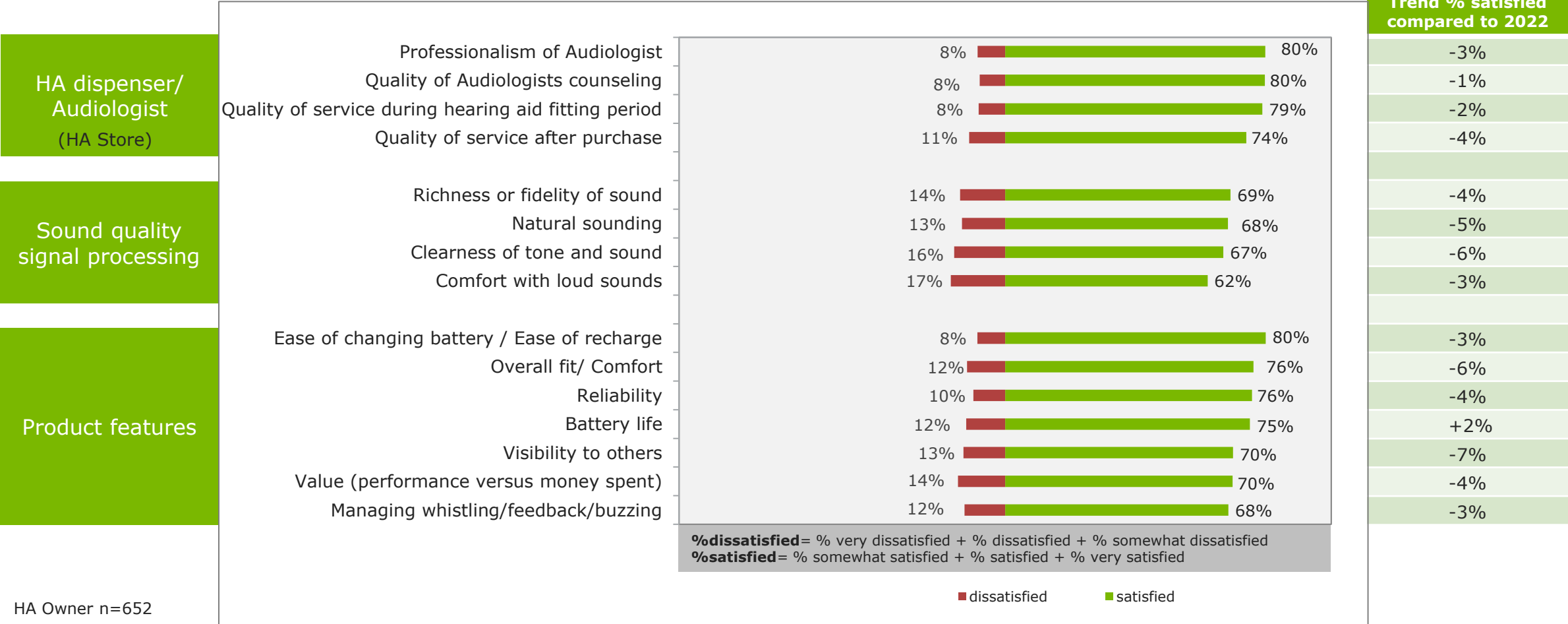


HA	% satisfied	Avg wear per day in hours
No aftercare n=126	63%	6.9
Aftercare n=495	75%	9.8





Satisfaction with current hearing aids

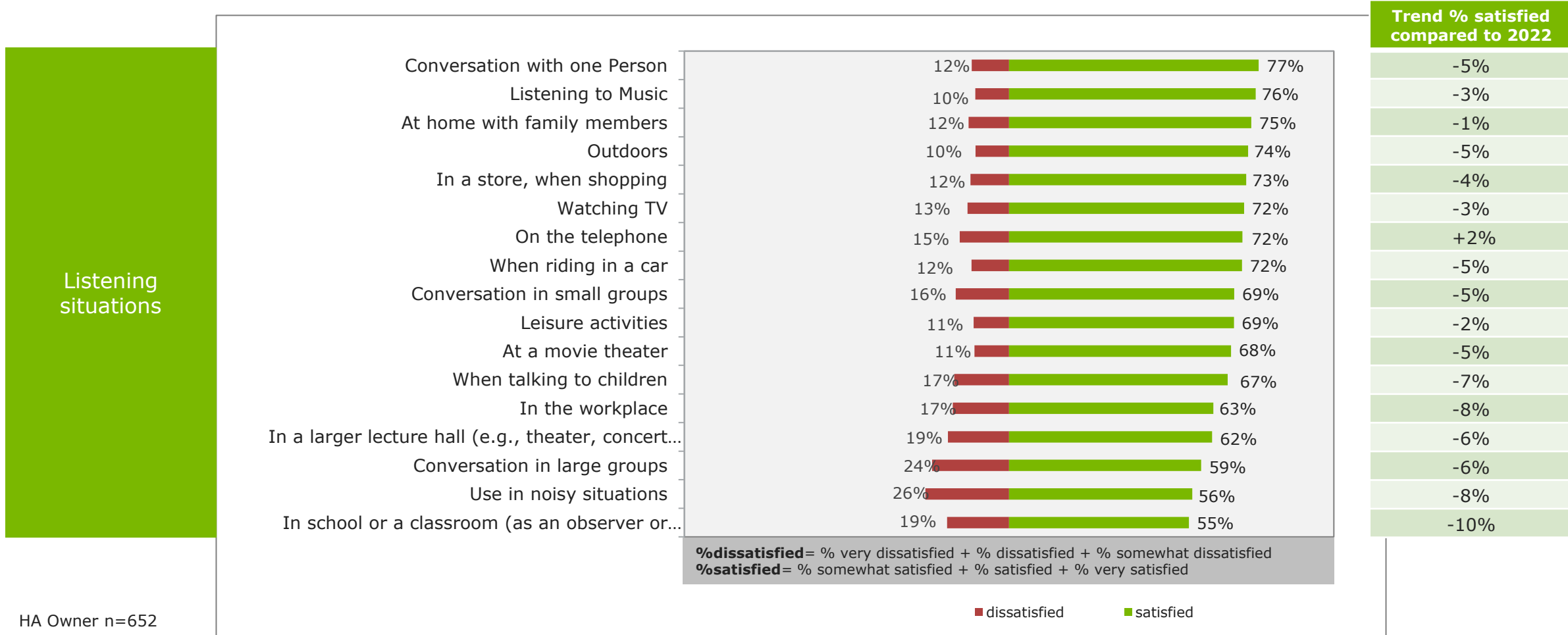


HA Owner n=652





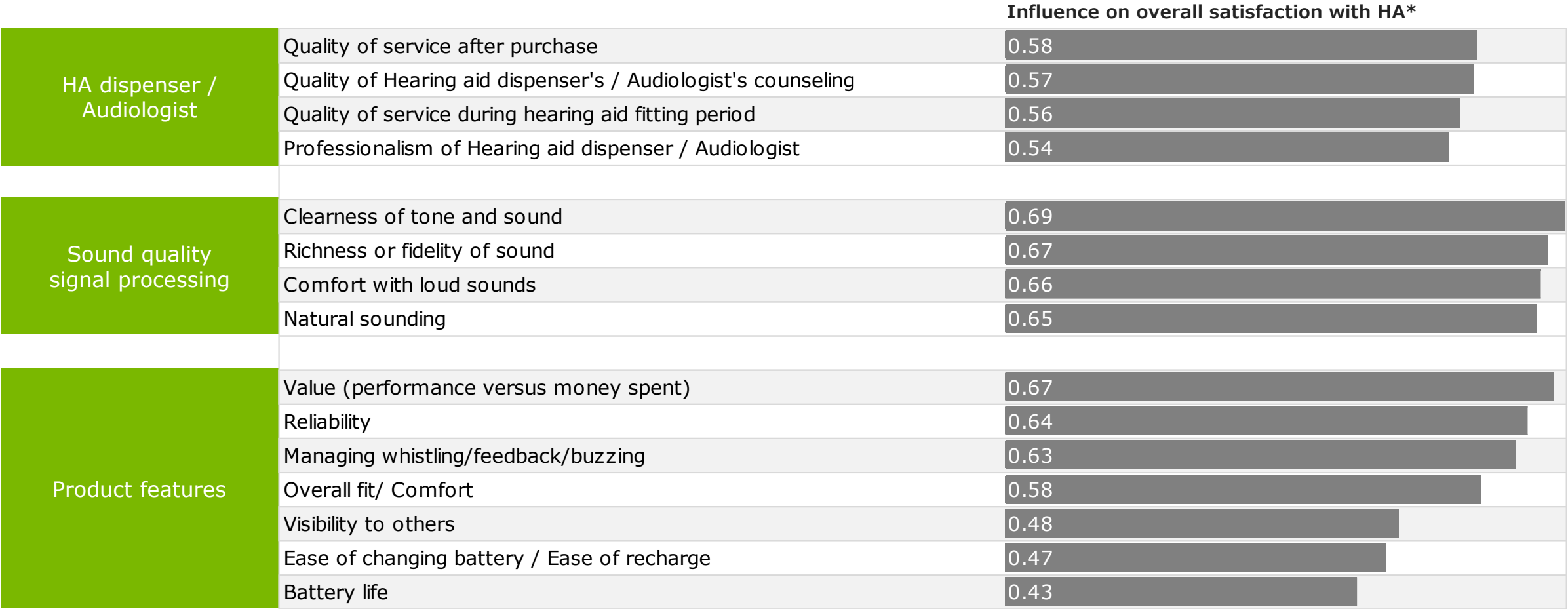
Satisfaction with current hearing aids



HA Owner n=652



The factors that most influence satisfaction with current hearing aids are clarity of sound and value for money



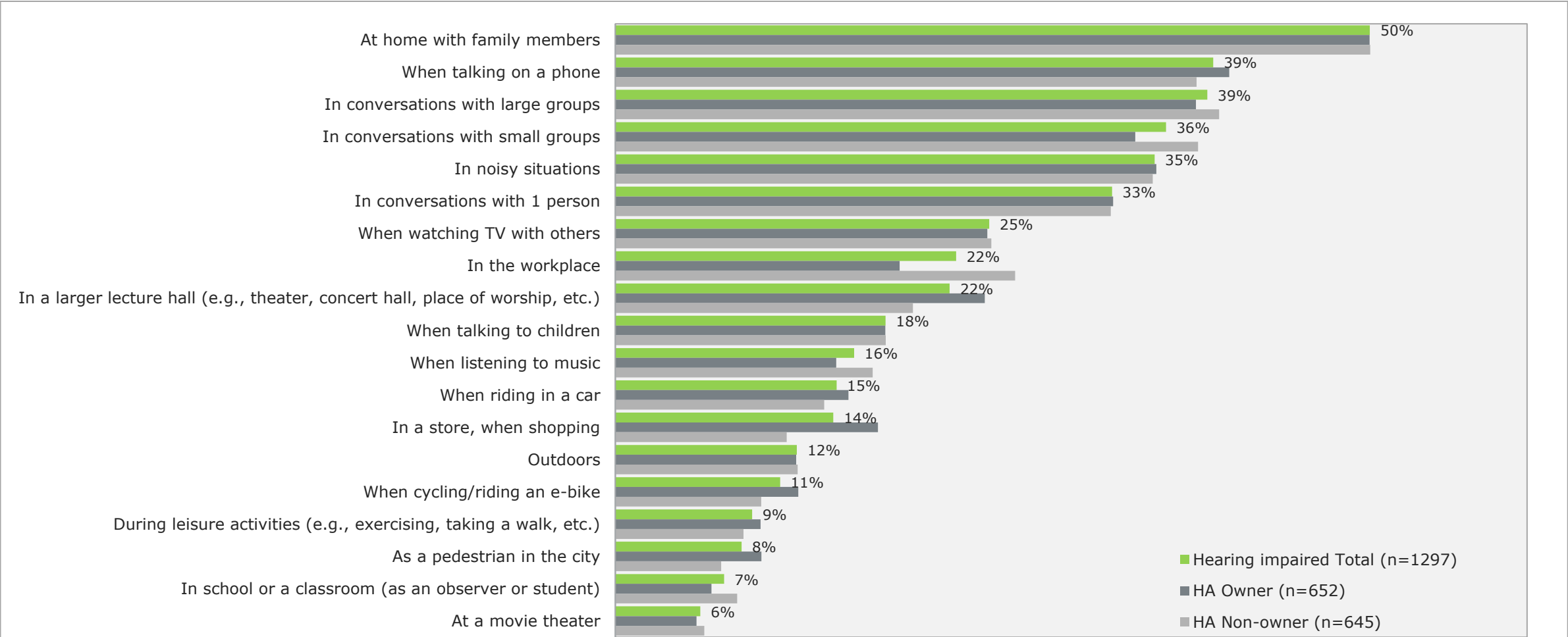
HA Owner n=652

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



The most important listening situations are conversations with family members at home, phone conversations, and group conversations

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

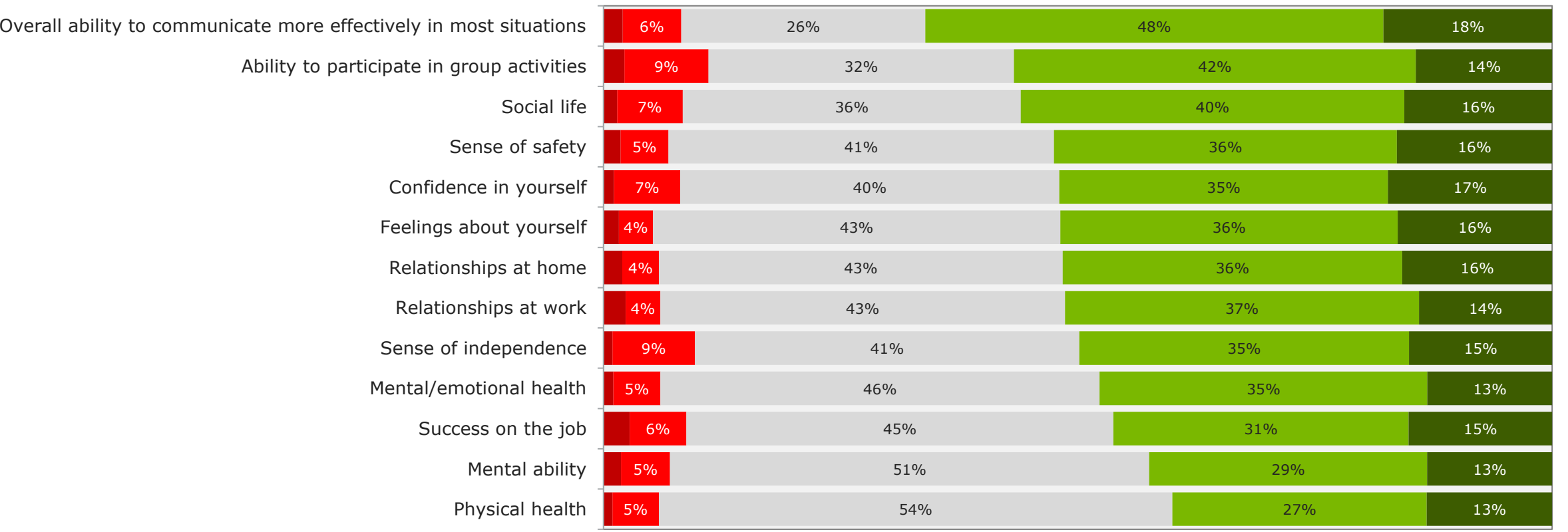


Positive impact of hearing aids, safety due to hearing aids, quality of life



Hearing aids positively impact overall communication ability in most situations, as well as social participation and social life

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



HA Owner n=652

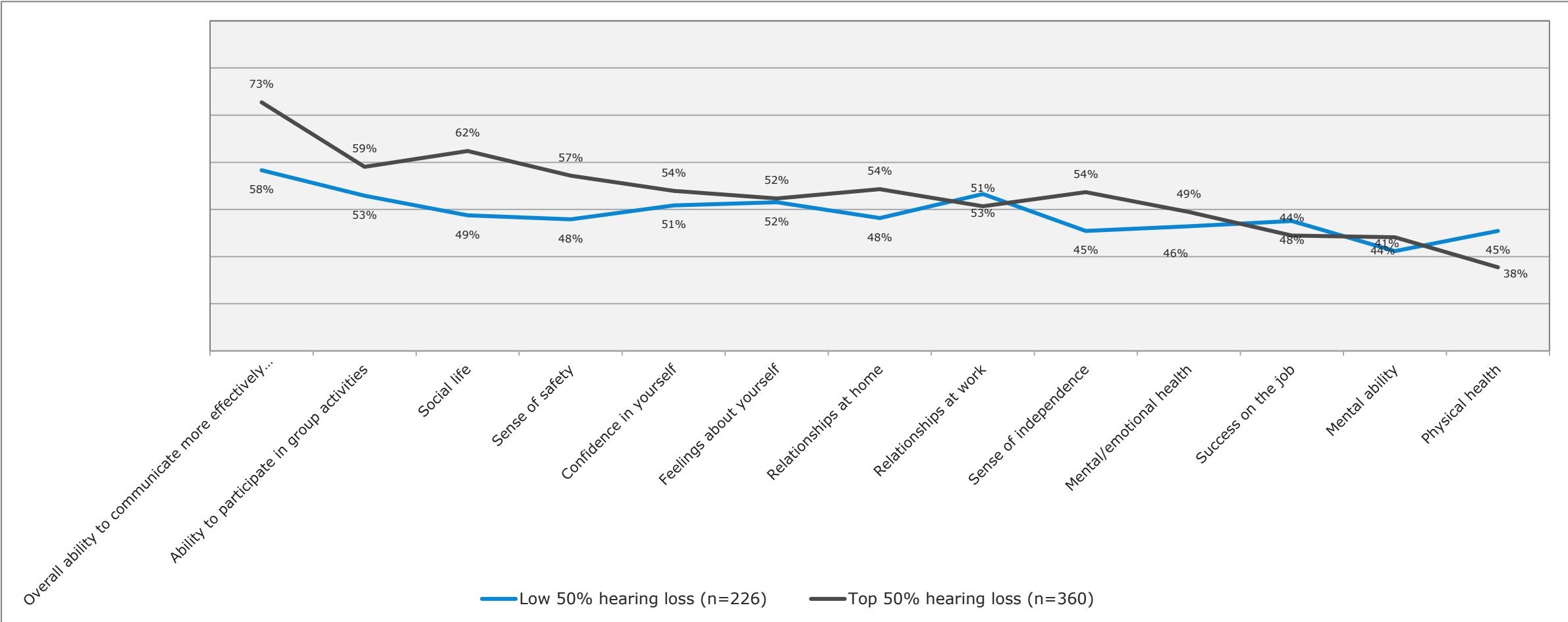
■ a lot worse ■ worse ■ the same ■ better ■ a lot better





Results suggest that patients in the top 50% of hearing loss perceive the impact of hearing aids somewhat more positively across most aspects

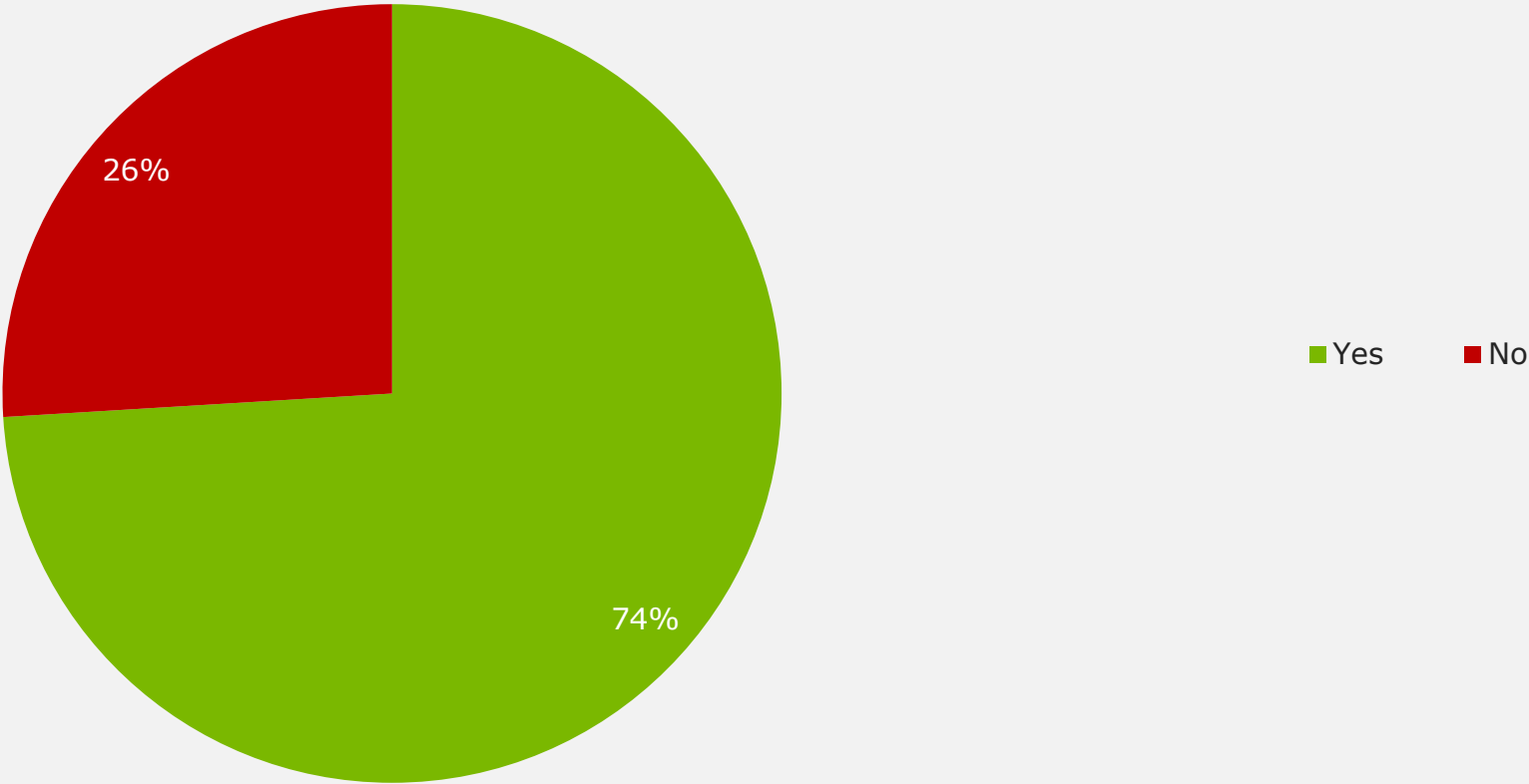
% of HA Owners feeling better/a lot better





74% 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?



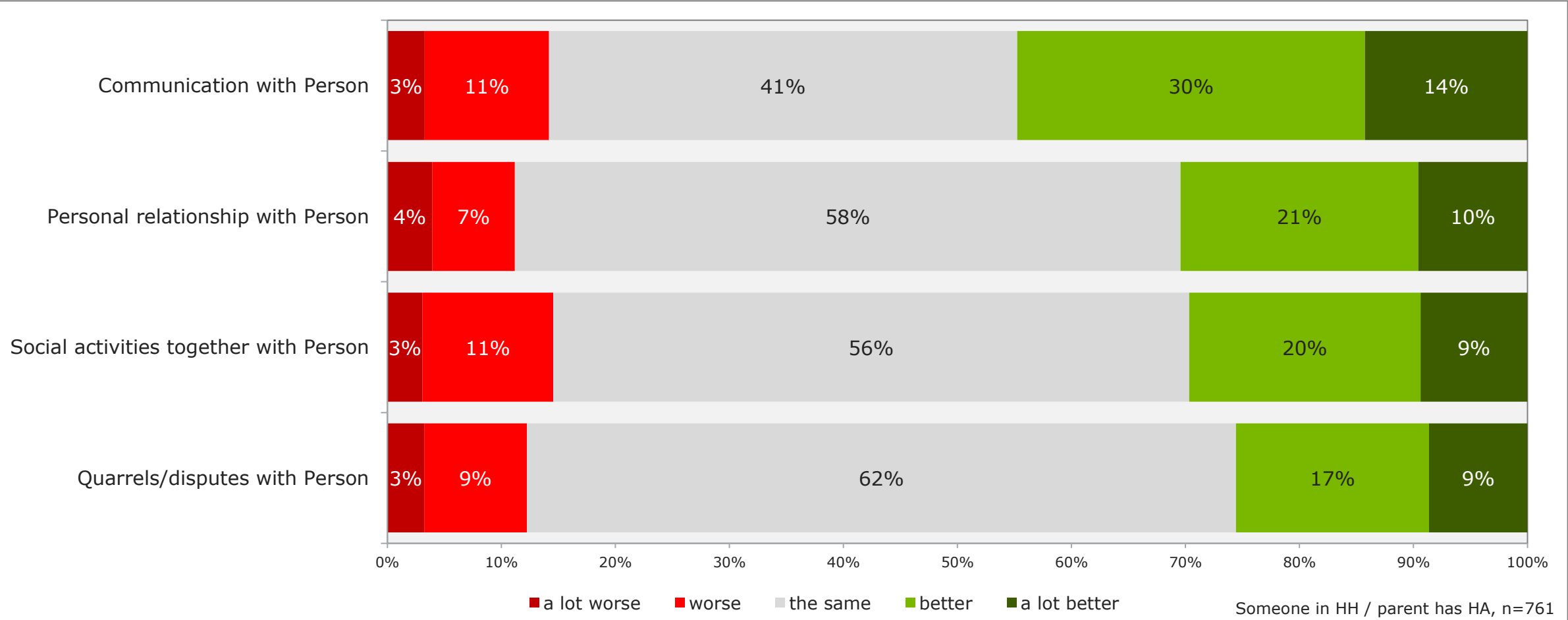
HA Owner n=652





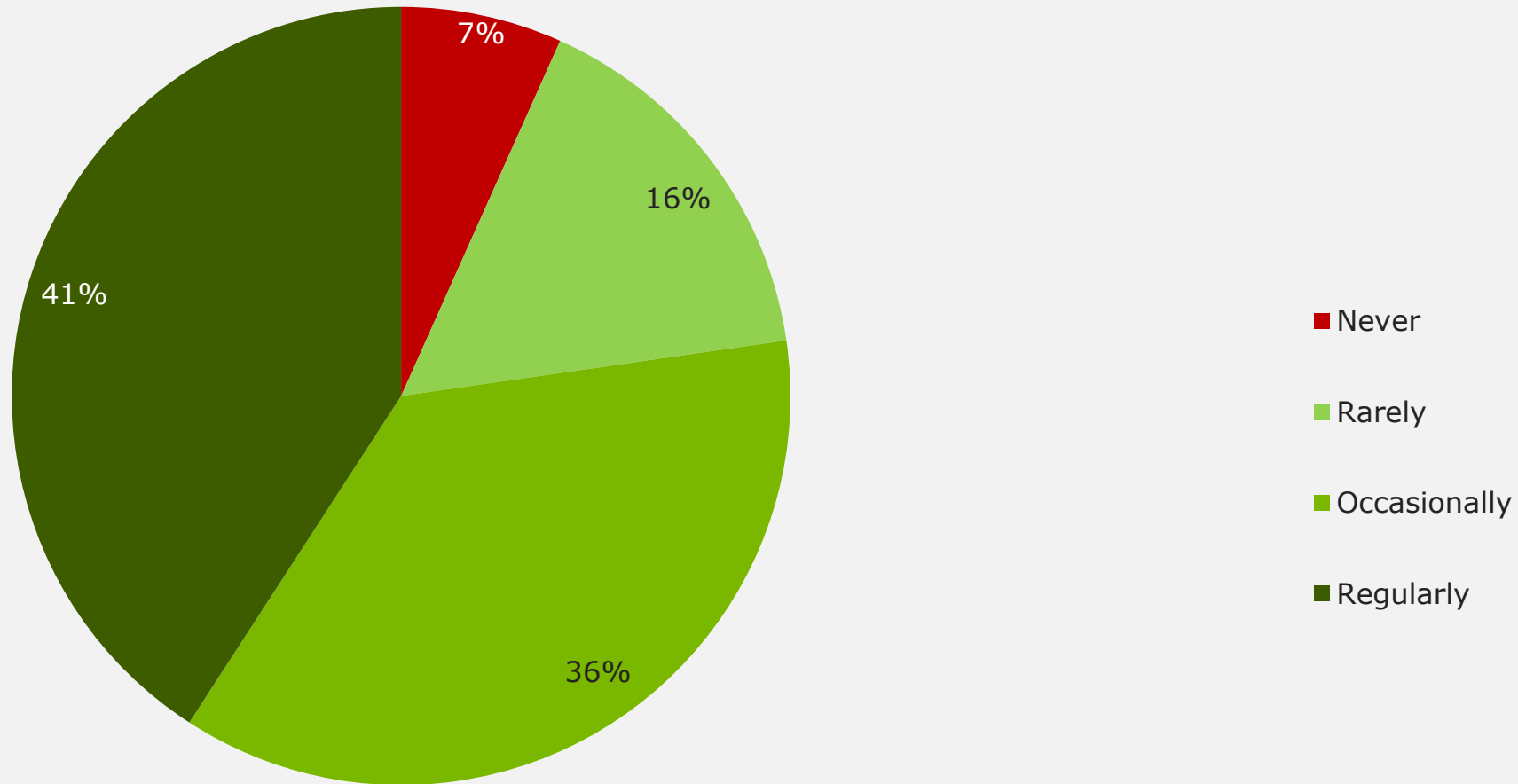
When someone with hearing loss wears hearing aids, it also improves the situation for others in the household

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



93% 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=652

4. Analysis of hearing impaired non-owners



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

Hearing loss characteristics: Owners compared to Non-owners

	HA Owner n=652	HA Non-owner low 50% HL n=341	HA Non-owner Top 50% HL n=181
Ears impaired (stated)			
Unilateral loss	26%	44%	42%
Bilateral loss	74%	56%	58%
Perceived loss			
Mild	12%	47%	11%
Moderate	49%	45%	51%
Severe	31%	7%	33%
Profound	8%	1%	5%

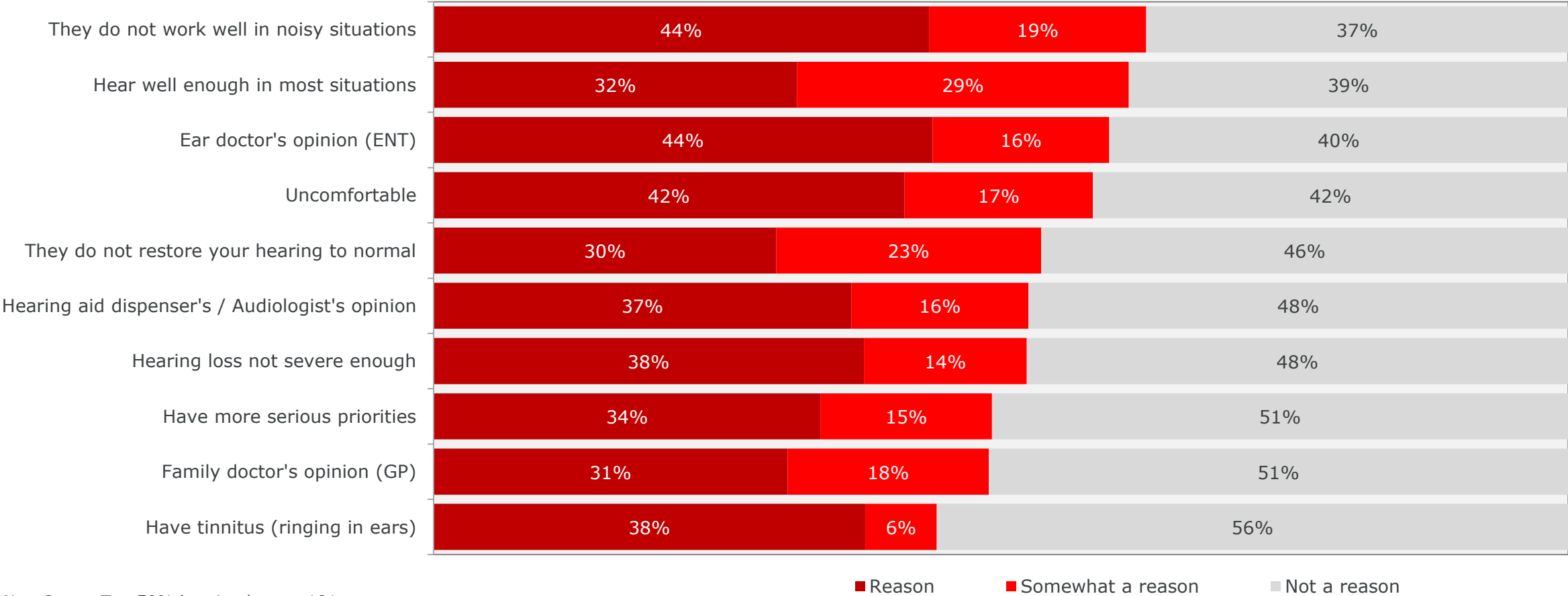
More similar hearing loss-structure



Reasons for not having hearing aids



Top 10 reasons for not having a hearing aid

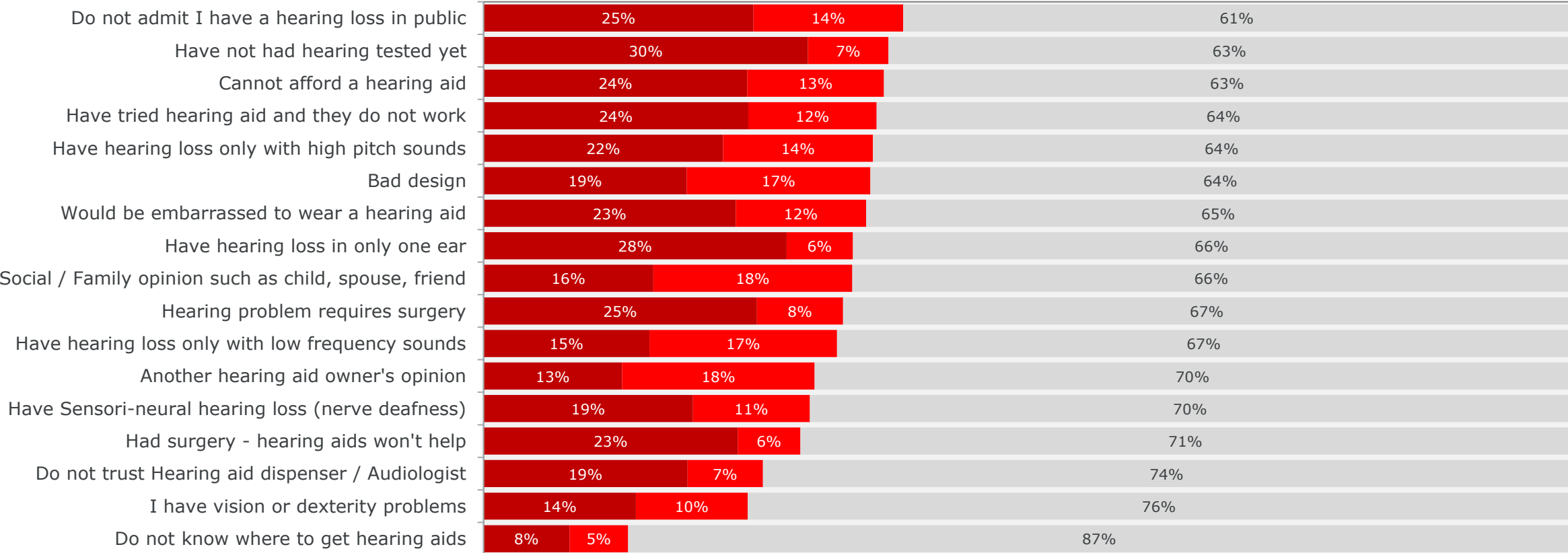


Non-Owner Top 50% hearing loss n=181





Less important reasons for not having a hearing aid



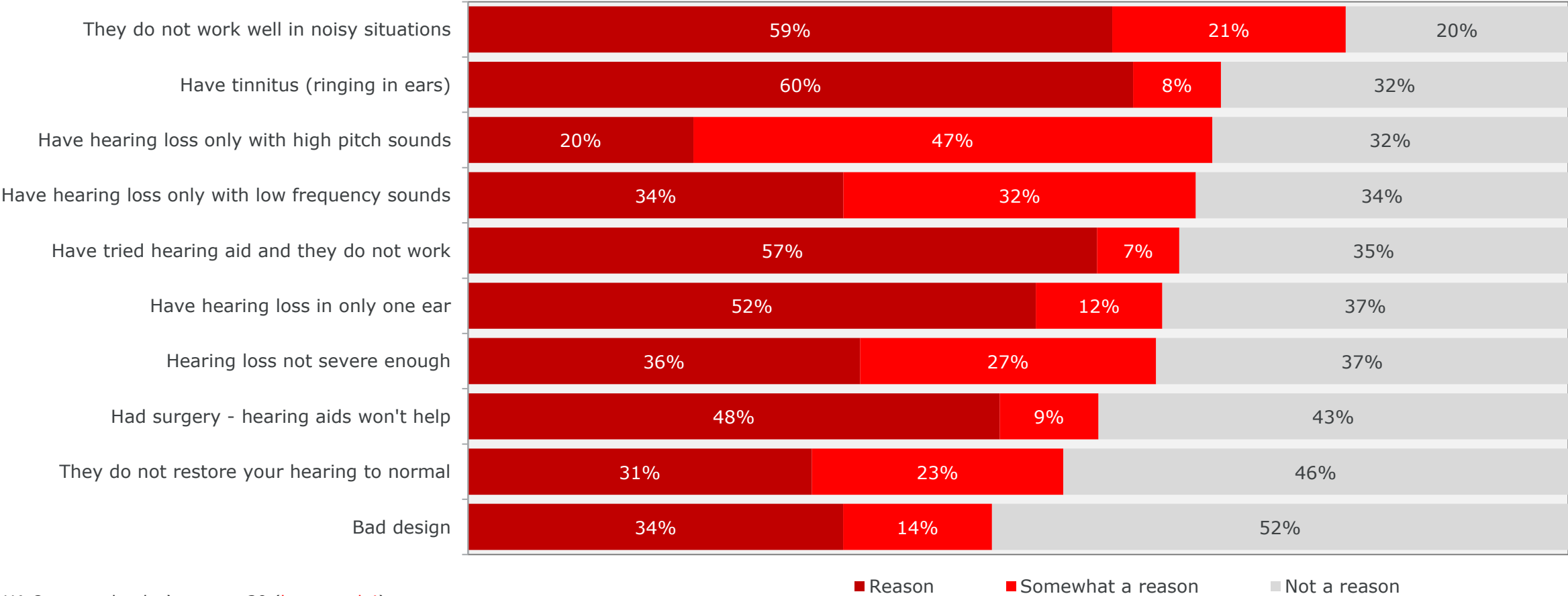
Non-Owner Top 50% hearing loss n=181

■ Reason ■ Somewhat a reason ■ Not a reason





Top 10 reasons for HA owners NOT using them



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



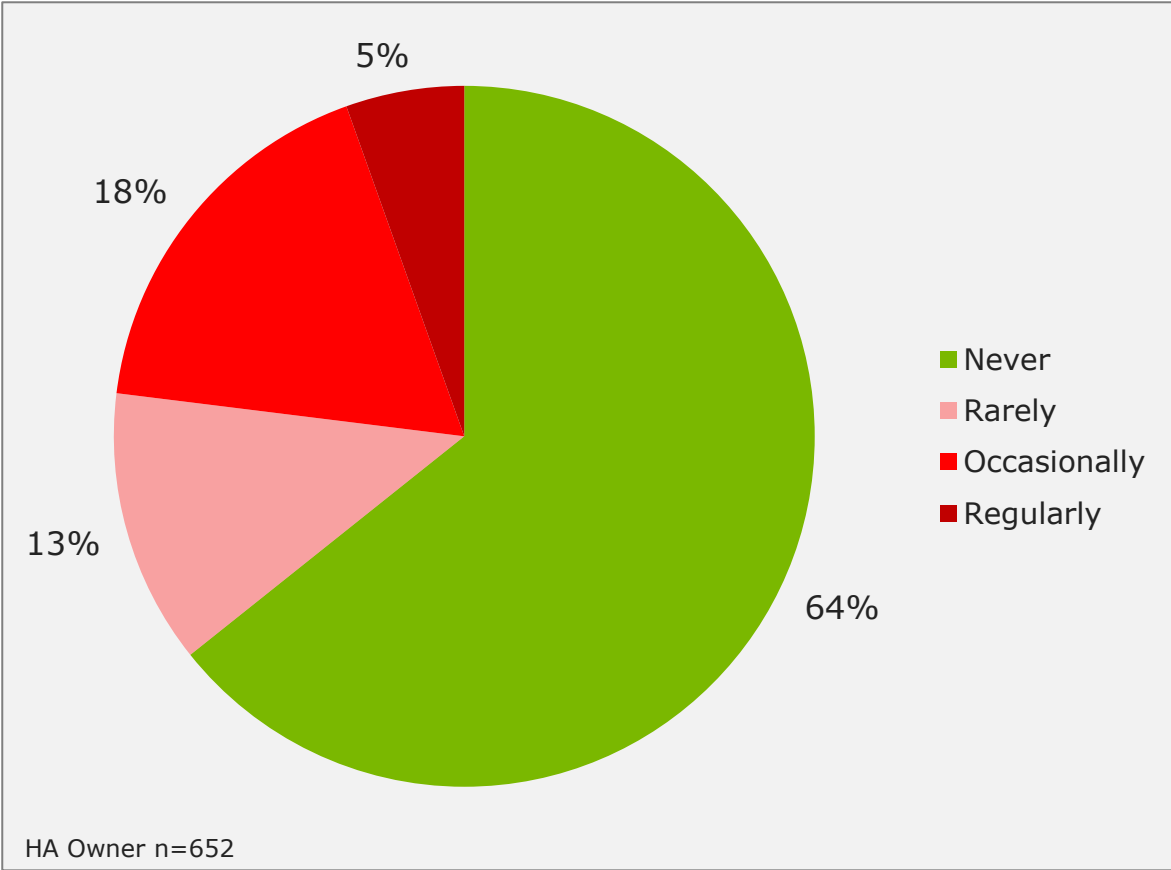
Social rejection because of hearing loss compared to the acceptance of hearing aids



64% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely that somebody makes fun of or rejects a hearing impaired without a hearing aid

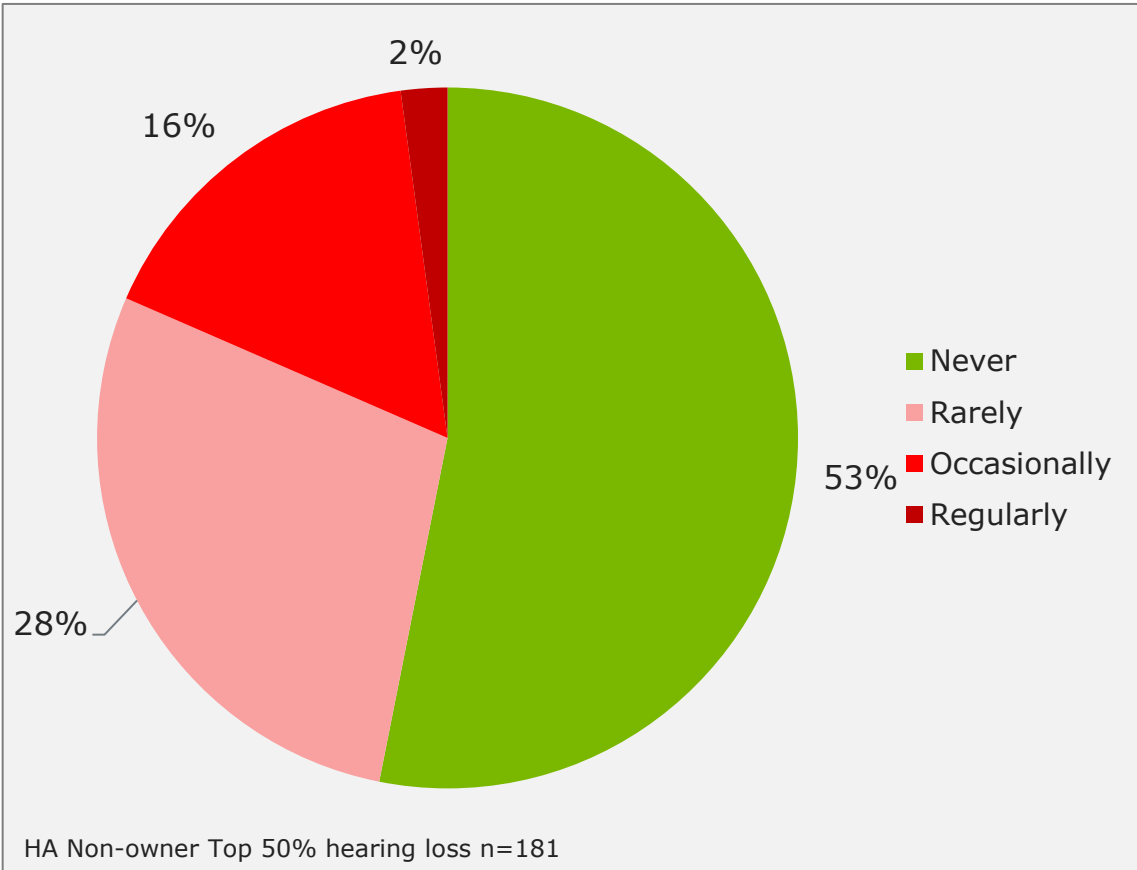
HA Owner:

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?

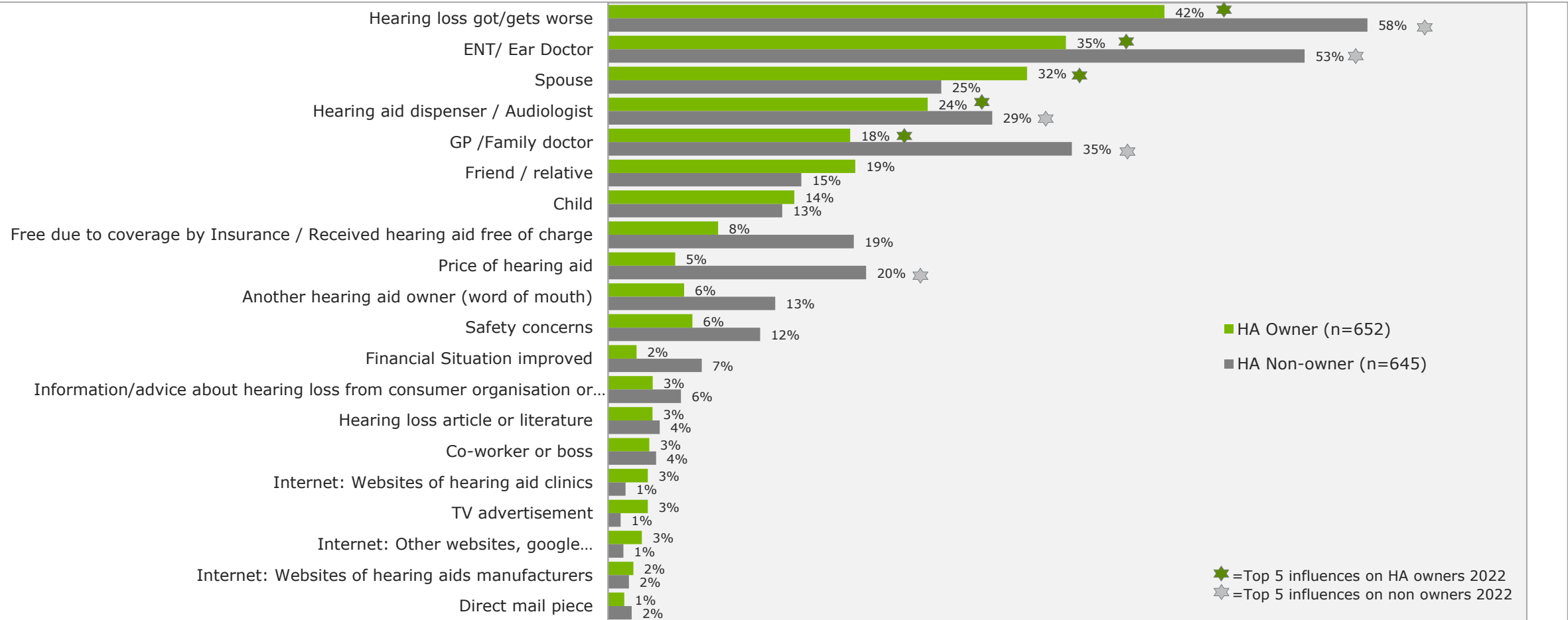


Most important triggers to buy



The key drivers for getting hearing aids are worsening hearing, ENT specialists, spouses, and hearing care professionals (GPs among non-owners)

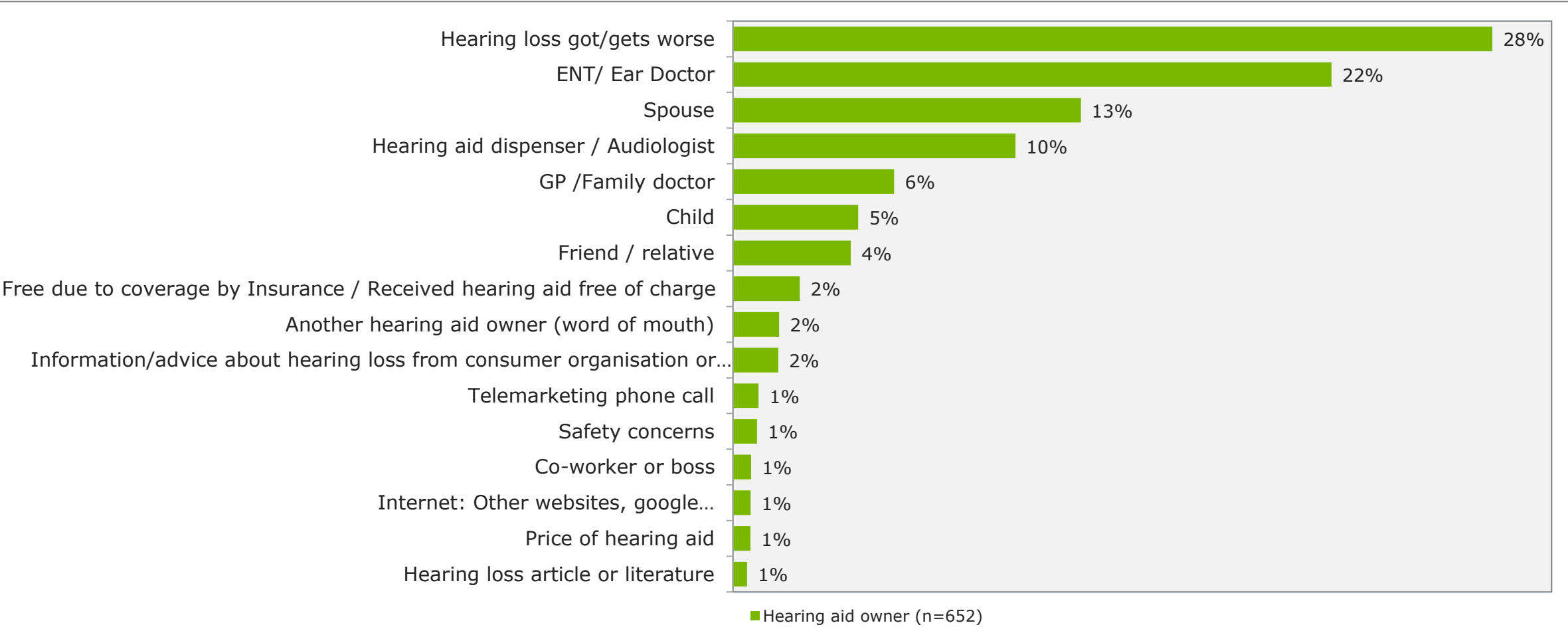
HA Owner: Thinking back to when you obtained your first hearing aid(s), what influenced you to obtain /purchase the hearing aid(s)?
HA Non-owner: What do you think would influence you to obtain / purchase a hearing aid ?





The most important reasons for buying a hearing aid are worsening hearing loss and the advice of ENTs

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



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APPENDIX



Demographics (1)

Hearing instrument adoption rates and populations

		Count	Hearing difficulty	Hearing aid adoption rate % (Base=Hearing impaired)	No hearing loss	Hearing loss but no hearing aids (HA Non-owner)	Hearing aids (HA Owner)
Gender							
	Male	7'148	11.2%	50.0%	49.4%	53.5%	51.3%
	Female	7'216	10.1%	52.3%	50.6%	46.5%	48.7%
Age							
	1 - 14	2'174	3.2%	62.2%	16.4%	3.5%	5.5%
	15 - 24	1'699	5.1%	53.5%	12.6%	5.3%	5.9%
	25 - 34	2'001	7.4%	49.6%	14.4%	10.0%	9.4%
	35 - 44	1'778	8.2%	42.4%	12.7%	11.2%	7.9%
	45 - 54	1'719	8.8%	35.9%	12.2%	12.9%	6.9%
	55 - 64	1'965	12.7%	41.4%	13.4%	19.5%	13.2%
	65 - 74	1'591	17.9%	55.3%	10.2%	17.0%	20.1%
	75+	1'437	27.7%	61.2%	8.1%	20.6%	31.2%
Type of household							
	single household	1'845	15.5%	46.7%	12.2%	20.3%	17.0%
	Couple, no kids	2'884	14.1%	52.5%	19.3%	25.9%	27.3%
	Couple with kid(s)	6'851	7.3%	51.9%	49.5%	32.3%	33.3%
	Single mom/dad with kid(s)	1'454	10.1%	52.2%	10.2%	9.4%	9.8%
	Retirement home, hospital etc.	408	20.7%	56.3%	2.5%	4.9%	6.1%
	Other	923	11.4%	48.5%	6.4%	7.2%	6.5%



Demographics (2)

Hearing instrument adoption rates and populations

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=Hearing impaired)	No hearing loss	Hearing loss but no hearing aids (HA Non-owner)	Hearing aids (HA Owner)
Status						
The head of the household (alone or together with someone)	7'133	14.2%	48.3%	47.7%	70.1%	62.6%
The spouse of the head of the household	3'202	11.5%	60.0%	22.1%	19.6%	28.1%
Daughter/son of head of household	3'409	2.6%	46.1%	25.9%	6.5%	5.3%
Other person	620	9.7%	52.1%	4.4%	3.9%	4.0%
Employment						
Zelfstandig ondernemer	920	12.1%	47.0%	7.7%	8.2%	7.1%
Werkzaam in loondienst	5'213	8.0%	42.6%	45.3%	33.4%	24.3%
Werkzaam bij de overheid	571	10.4%	40.6%	4.8%	4.9%	3.3%
Arbeidsongeschikt	765	14.9%	46.6%	6.2%	8.5%	7.2%
Werkloos / werkzoekend / bijstand	524	11.5%	44.9%	4.4%	4.6%	3.7%
Gepensioneerd of VUT	2'392	24.0%	58.5%	17.2%	33.0%	45.7%
Studerend / schoolgaand	898	3.8%	41.5%	8.2%	2.8%	1.9%
Huisvrouw / huisman / anders	745	11.2%	59.2%	6.3%	4.7%	6.7%
Education						
Geen onderwijs / basisonderwijs / cursus inburgering / cursus Nederlandse taal	548	19.1%	43.0%	4.2%	8.2%	6.1%
LBO / VBO / VMBO (kader- of beroepsgerichte leerweg) / MBO 1 (assistentenopleiding)	1'330	17.4%	54.9%	10.4%	14.5%	17.3%
MAVO / HAVO of VWO (eerste drie jaar) / VMBO (theoretische of gemengde leerweg) / voortgezet speciaal onderwijs	1'529	12.5%	58.6%	12.7%	10.9%	15.2%
MBO 2, 3, 4 (basisberoeps-, vak-, middenkader of specialistenopleiding) of MBO oude structuur (voor 1998)	3'219	10.9%	44.8%	27.1%	26.8%	21.4%
HAVO of VWO (overgegaan naar de 4e klas)	1'065	10.6%	48.1%	9.0%	8.1%	7.4%
HBO propedeuse of WO propedeuse / HBO (behalve HBO-master) / WO-kandidaats of WO-bachelor	3'069	10.9%	54.5%	25.9%	21.0%	24.8%
WO-doctoraal of WO	879	10.4%	40.0%	7.4%	7.6%	5.0%
Anders	394	10.4%	50.4%	3.3%	2.8%	2.8%



Sample size and random sample error: Rules of thumb

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

Sample size	Random sample error	
	Real value is within interval:	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
50	± 13.9	± 9.9
100	± 9.8	± 7.0
250	± 6.2	± 4.4
500	± 4.4	± 3.1
1'000	± 3.1	± 2.2
5'000	± 1.4	± 1.0
10'000	± 1.0	± 0.7

