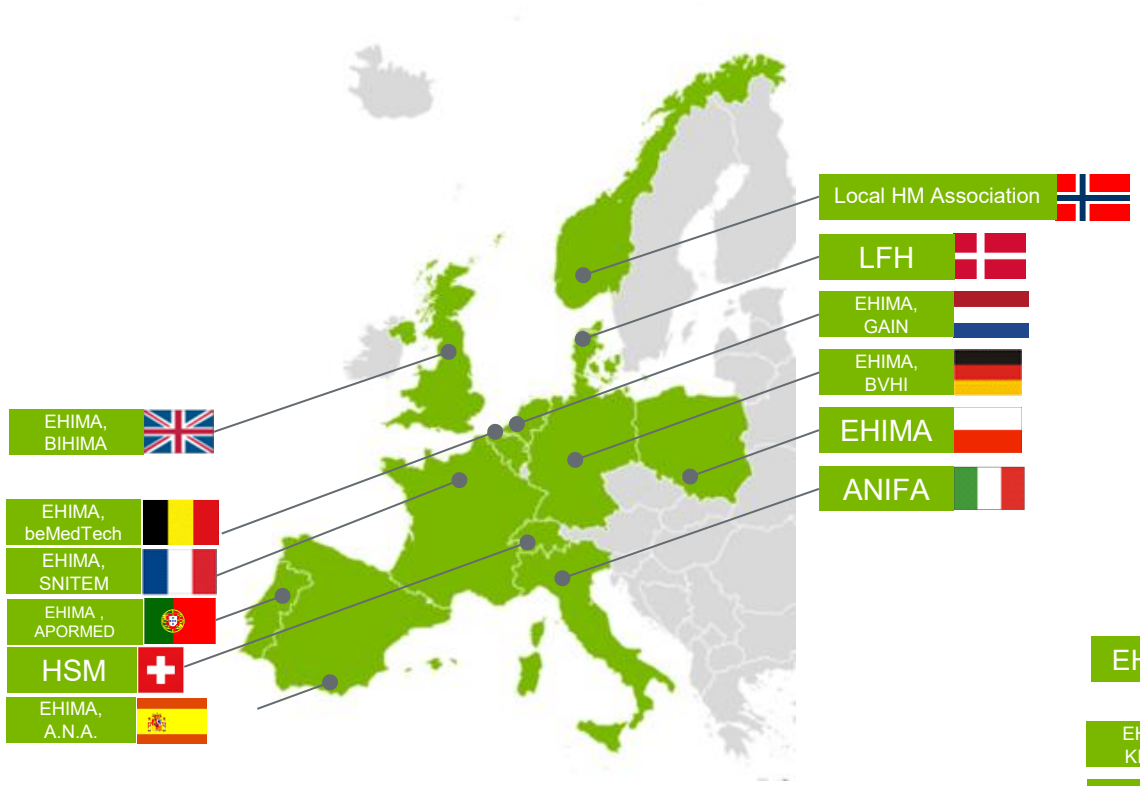
Results

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





EuroTrak POL 2026 was designed and executed by Anovum (Zurich) on behalf of EHIMA and supported by local companies.

Sample sizes:

Representative sample (sample 1):	n= 14'892 people
Hearing impaired (sample 2):	n= 1’264 people
Hearing impaired non-owners (HA Non-owner):	n= 768 people
Hearing aid owner (HA Owner):	n= 496 people

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Summary
2. Market overview

- **Stated hearing loss prevalence**
  - Total: 12.6%, 18+: 14.4%.
  - Hearing Tests: 39% had a hearing test in the last five years, most tests done by ENT doctors.
- **Hearing aid adoption rate (HA penetration)**
  - 35.1% of those with self-declared HL.
  - 4.4% of total population.
  - 55% of HA owners have binaural treatment.
- **The route to the hearing aid**
  - 77% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 51% got hearing aids recommended from the ENT or family doctor (drop out rate=33%).
  - 74% of the GP consultations referred to an ENT, 19% to a HA dispenser / Audiologist, and 12% to get hearing aids. 9% recommended no action.
  - 45% of ENT consultations were referred to a HA dispenser / Audiologist, 26% recommended getting a hearing aid, and 36% 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.
  - 43% of employed individuals using hearing aids believe the devices enable them to work longer
  - Hearing aid owners are slightly more likely to have a low probability of depression.
  - Hearing aid owners are less exhausted in the evening.

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Summary
3. Analysis of hearing aid owners

- **Hearing aid ownership, usage, and accessories**
  - 75% of the hearing aid owners received some kind of third party reimbursement.
  - 57% of the currently owned HAs were acquired in 2024 or later.
  - The median age of hearing aids before replacement is five years.
  - On average, HAs are worn 7.4 hours a day.
  - RICs are the most often purchased type of HA
  - Cochlear Implants: 32% of the HA owners with severe/profound HL have been informed about CIs by a medical professional.
  - 41% of HA owners use a hearing aid app, and 76% of them are satisfied with it.
- **Hearing aid satisfaction and the importance of listening situations**
  - 78% of the hearing aid owners say their hearing aid works better than or as expected.
  - 71% 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 slightly higher than with older hearing aids.
  - For hearing aid owners, hearing well is most important at home with family members, when watching TV and in larger venues.
- **Positive impact of HAs**
  - Hearing aids positively impact overall communication ability in most situations, as well as on self-esteem and social life
  - 74% of hearing aid owners feel more confident moving in a city since wearing hearing aids.
  - 96% 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

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Summary
4. Analysis of hearing impaired non-owners

- **Reasons not to own/use HAs**
  - 48% of non-owners don’t know whether they would receive any reimbursement, and 12% think there is nothing.
  - The main reasons for not having hearing aids are the perception that one’s hearing is good enough in most situations, that they are uncomfortable, and that they do not work well in noisy situations.
  - 7% who own hearing aids don’t use them (0 hours); 13% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**
  - 51% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is much more likely that somebody makes fun of or rejects a person with hearing loss who does not wear a hearing aid.
  - The key drivers for getting hearing aids are worsening hearing, ENT specialists and spouses; hearing care professionals are particularly important among owners, while price and insurance coverage matter more among non-owners.
  - The most important reasons for buying a hearing aid are worsening hearing loss and advice from doctors, audiologists and spouses

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Detailed Results: Roadmap

1. **Introduction**
   - Organisation of EuroTrak POL 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, 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

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1. Introduction

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Organisation of EuroTrak POL 2026

Organisation

- Principals of the project EuroTrak POL 2026 are: EHIMA and local supporting companies: Amplifon Poland Sp. Z o.o., GN Hearing A/S, Oticon Polska Sp. z o.o., Sonova Polska Sp. z o.o, Starkey Laboratories Poland Sp. z o.o., WS Audiology Poland Sp. z o.o.
- Anovum Zurich developed the concept, 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 POL/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.

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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=14'892** 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= 768** hearing impaired non-owners and **n=496** hearing aid owners

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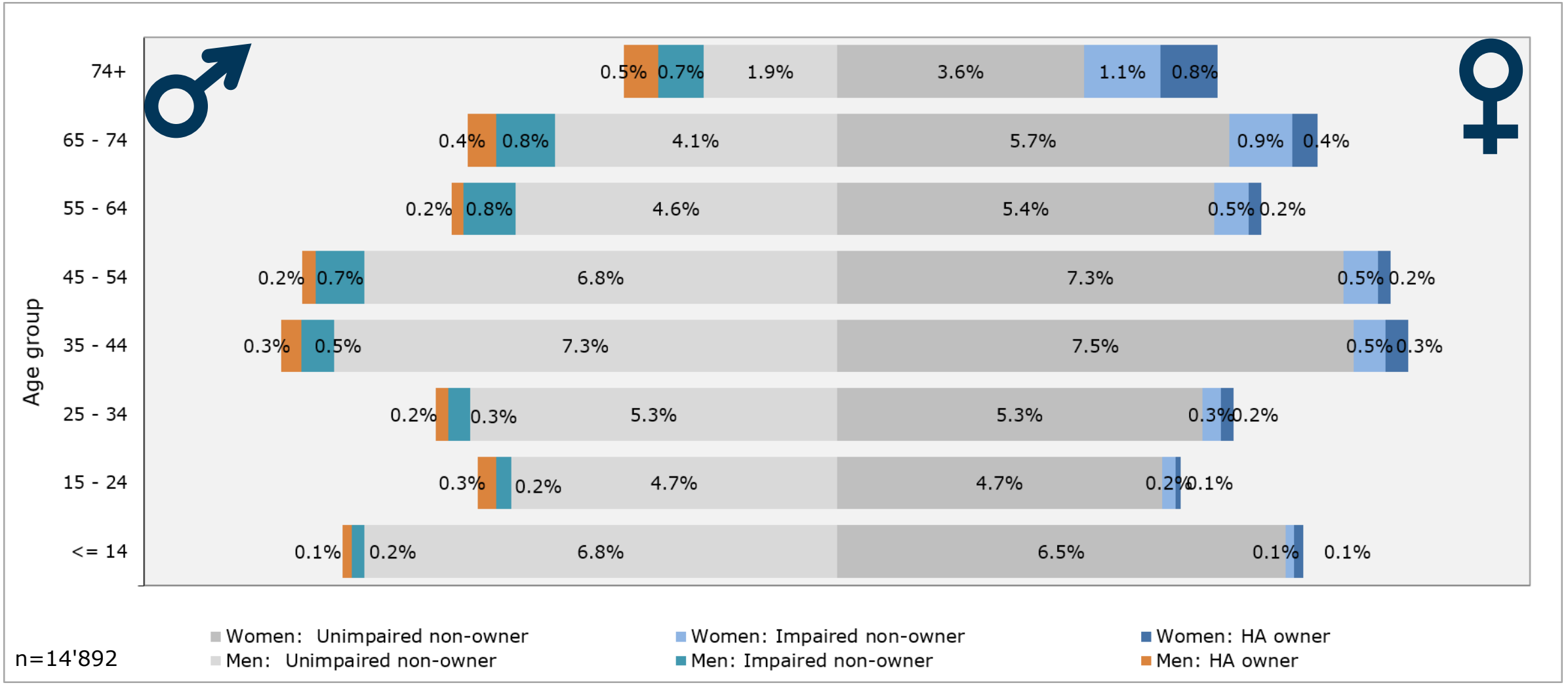
2. Market overview

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Prevalence of hearing loss and adoption rate

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Hearing loss and hearing instrument ownership by gender/age

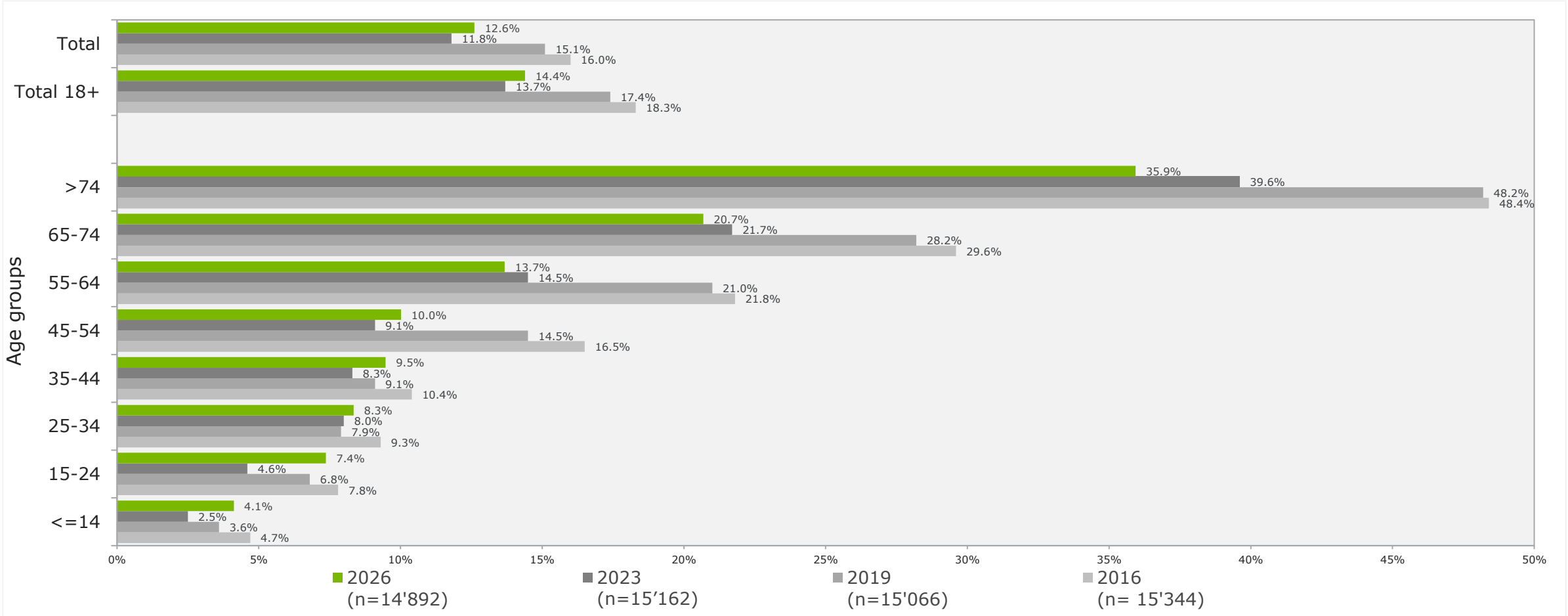


n=14'892

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Hearing loss prevalence POL
Self-declared hearing loss

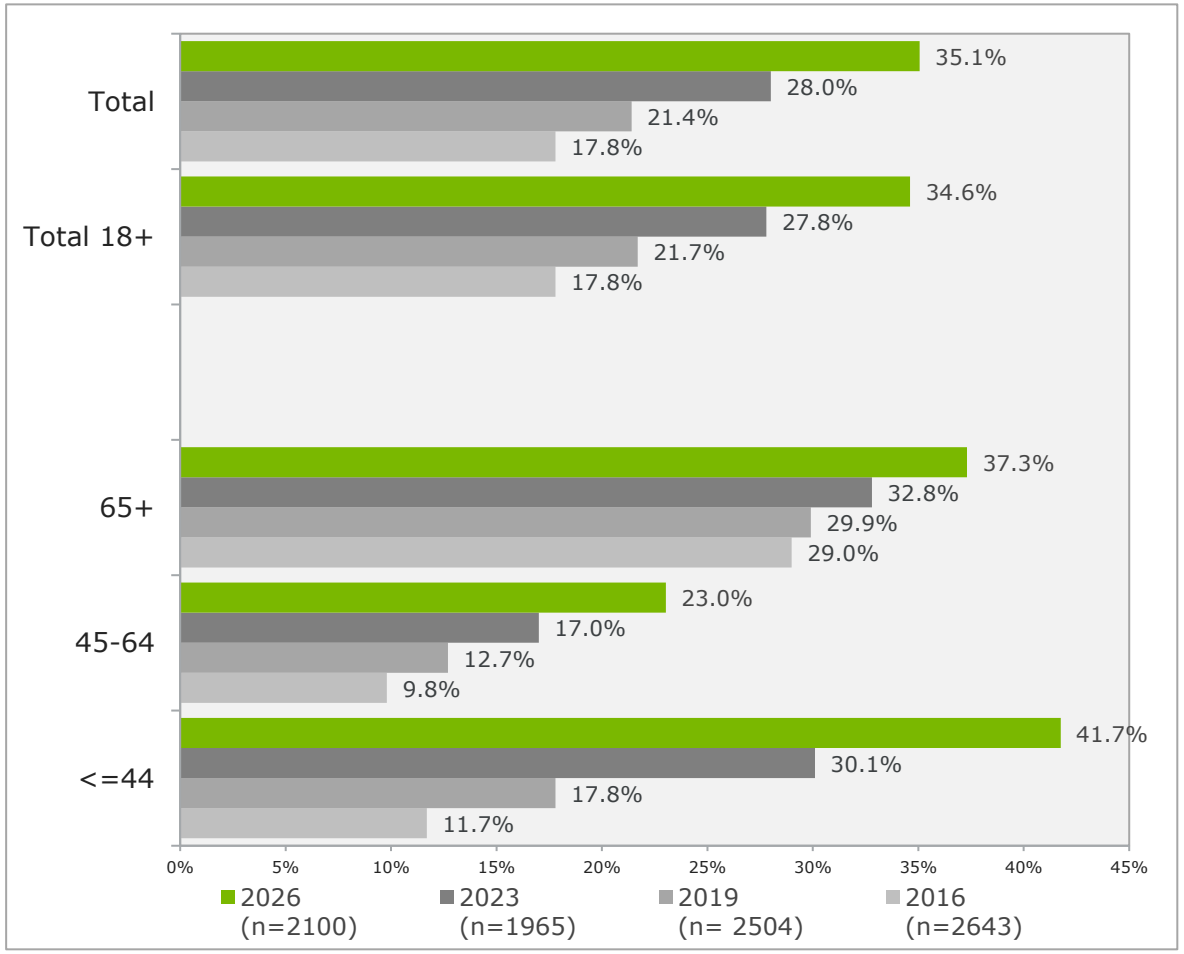
% hearing loss prevalence by age groups

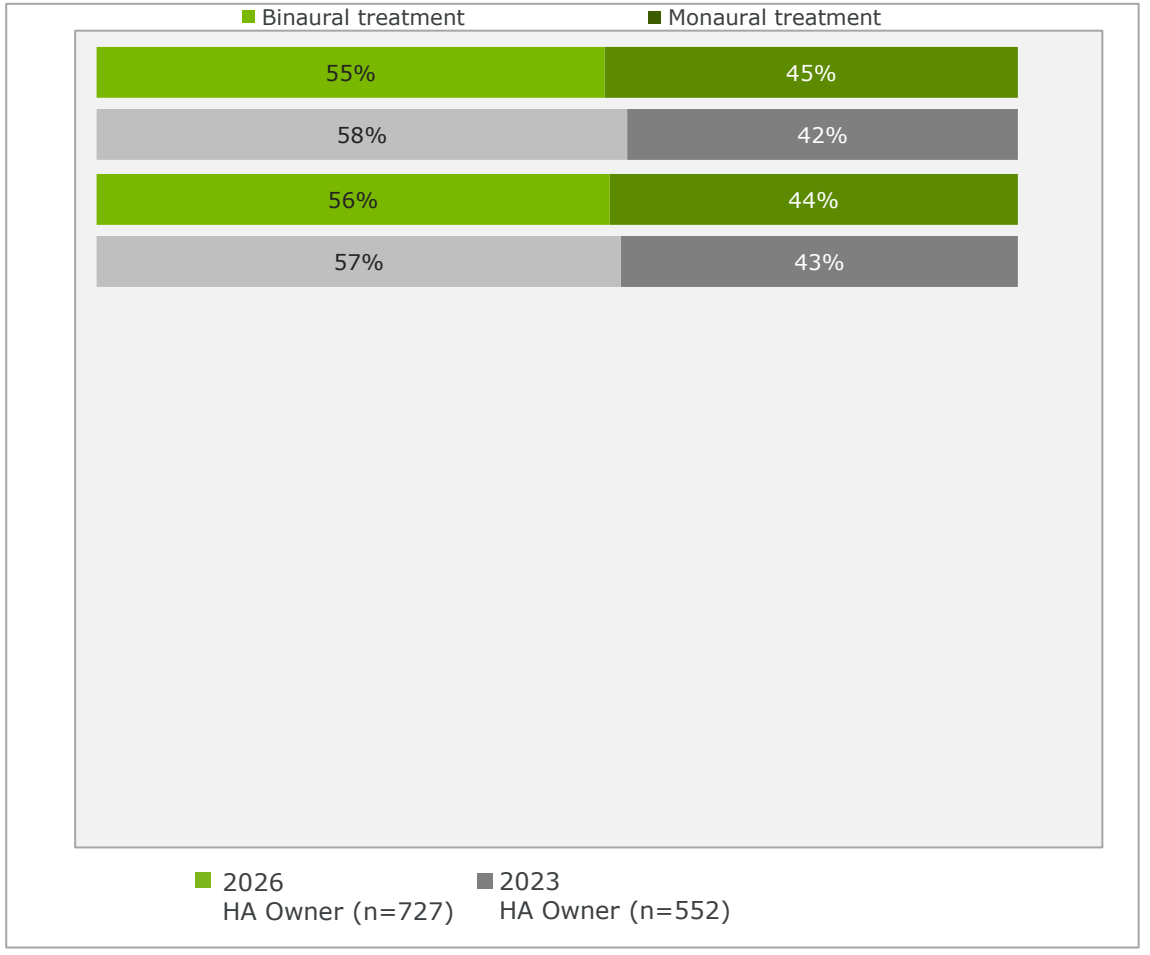


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Hearing aid adoption rate: 35% of the hearing impaired have hearing aid(s), and 55% of them have binaural treatment

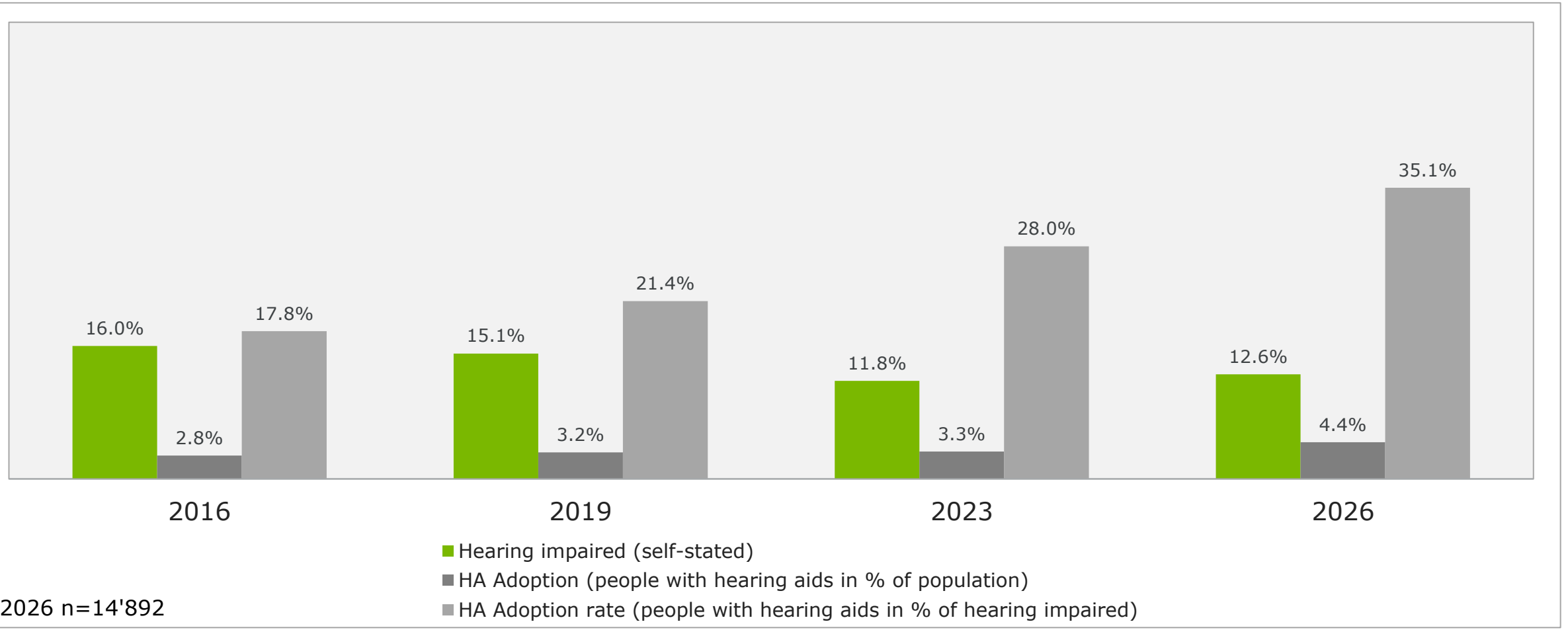
% of hearing impaired





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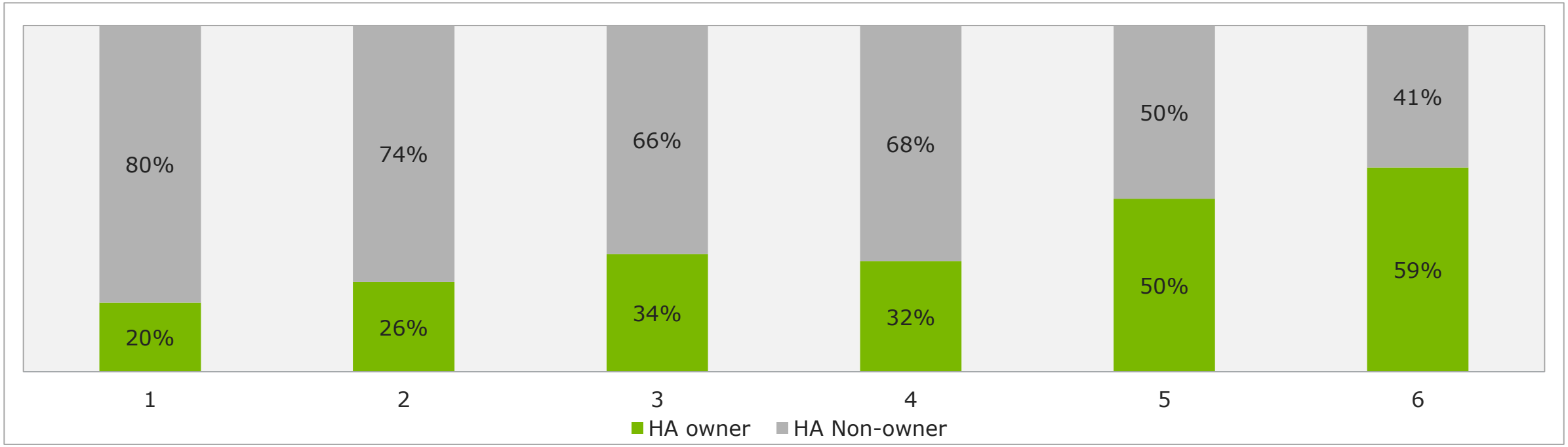
Overview of hearing loss prevalence and hearing aid adoption



2026 n=14'892

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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=768
HA Owner n=496

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Hearing loss

Hearing loss characteristics: Owners compared to non-owners

	HA Non-owner n=768	HA Owner n=496	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	37%	31%	33%
Bilateral loss	63%	69%	39%
Perceived loss			
Mild	45%	15%	15%
Moderate	39%	41%	36%
Severe	14%	37%	58%*
Profound	3%	8%	

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

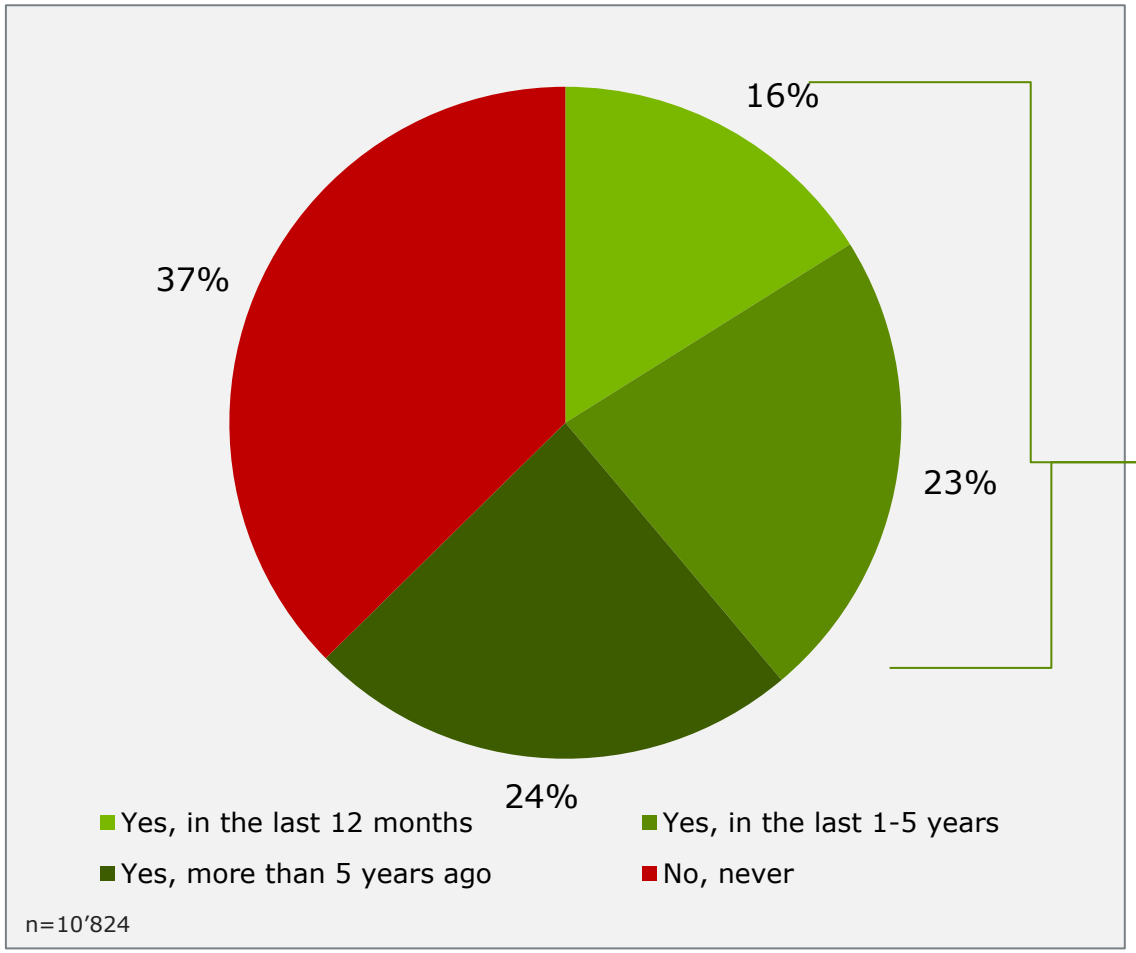
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Hearing tests and where hearing is tested

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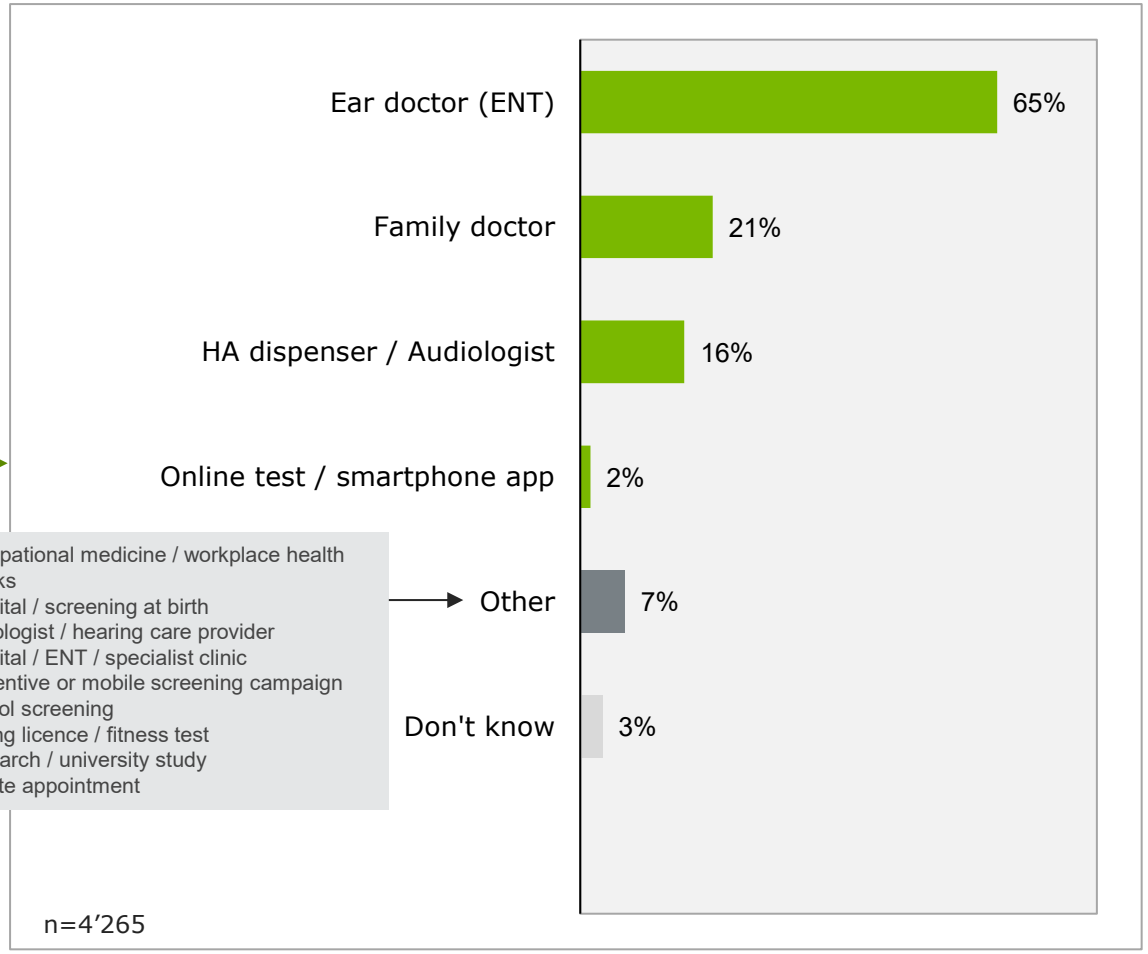
Hearing Tests: 39% had a hearing test in the last five years, most tests done by ENT doctors

Have you ever taken a hearing test?



n=10’824

Where/how was your hearing tested?



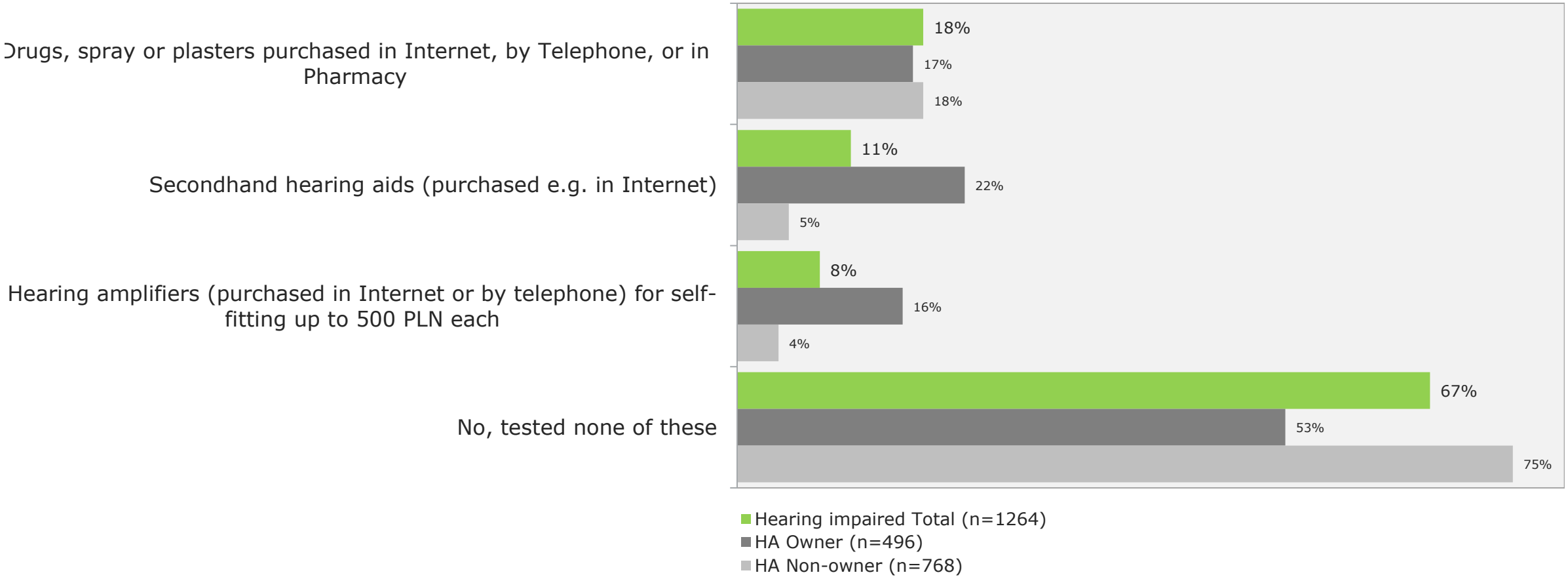
- Occupational medicine / workplace health checks
- Hospital / screening at birth
- Audiologist / hearing care provider
- Hospital / ENT / specialist clinic
- Preventive or mobile screening campaign School screening
- Driving licence / fitness test
- Research / university study
- Private appointment

n=4’265

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1 out of 5 hearing impaired has already tried drugs, spray or plasters to improve hearing

Did you ever test any of the following to improve your hearing?



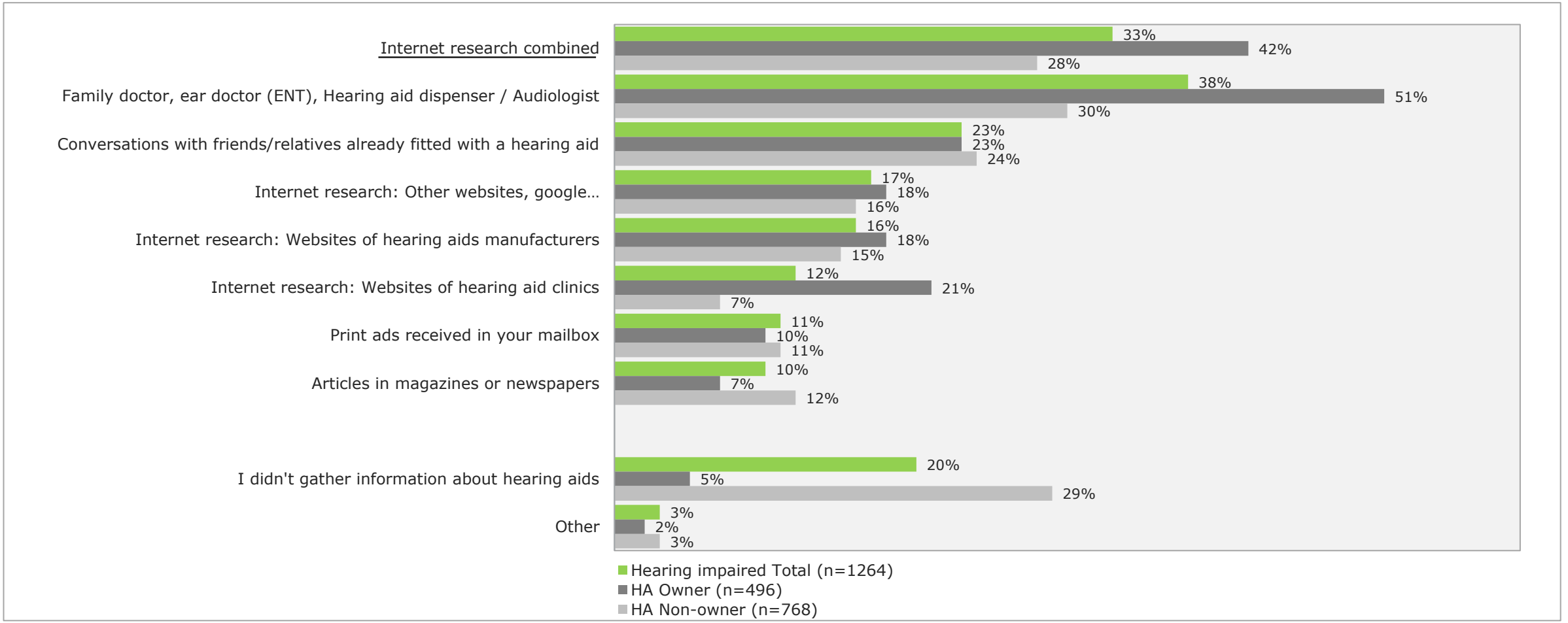
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The route to the hearing aid:
Sources of information and drop-out rates

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Internet research and doctors are the main information sources and key gatekeepers, followed by friends and relatives wearing hearing aids

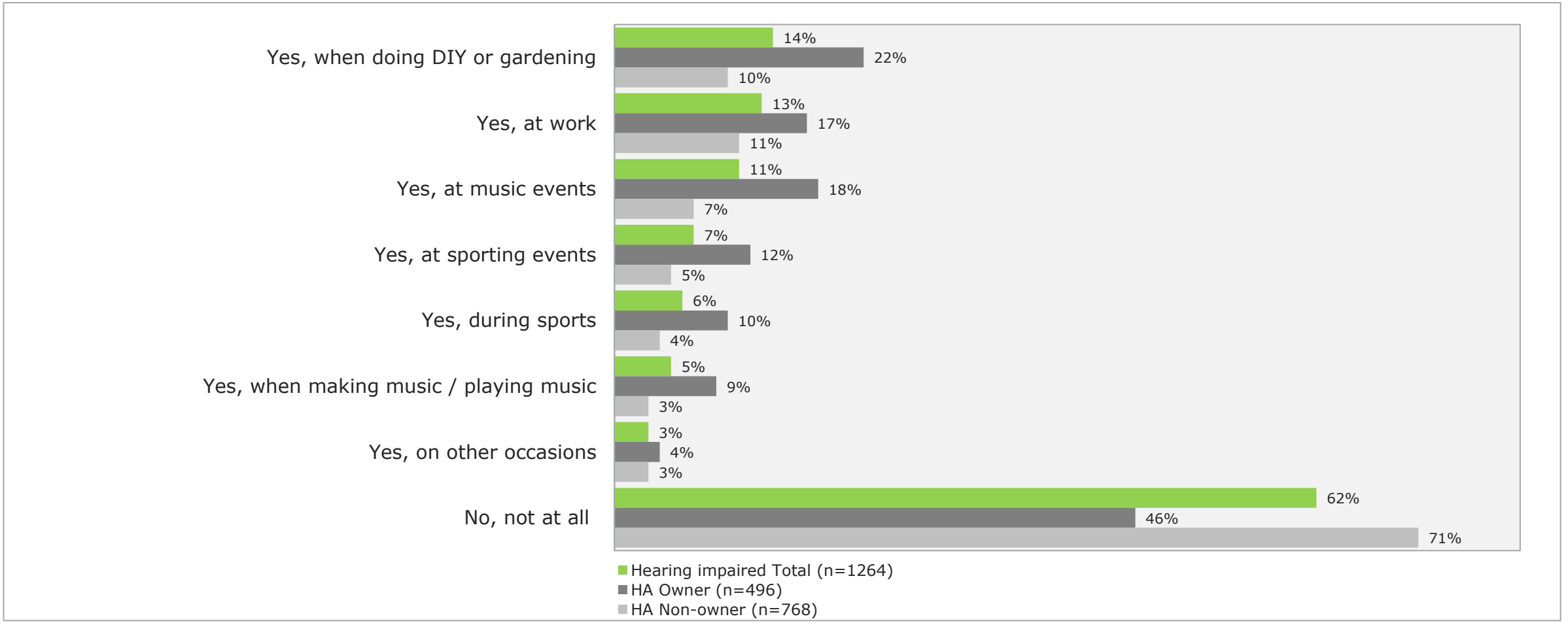
Where did you gather information about hearing aids?



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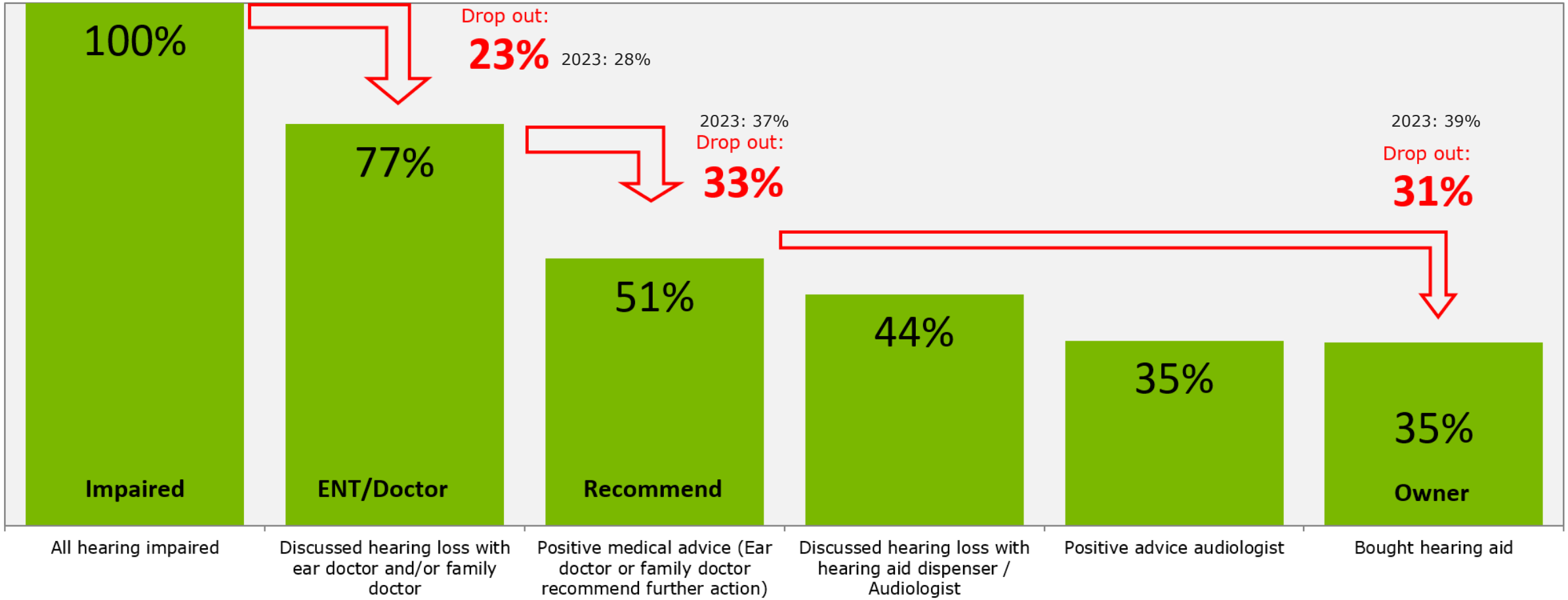
Usage of hearing protection by hearing impaired

Do you use hearing protection at least occasionally?



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The route to the hearing aid

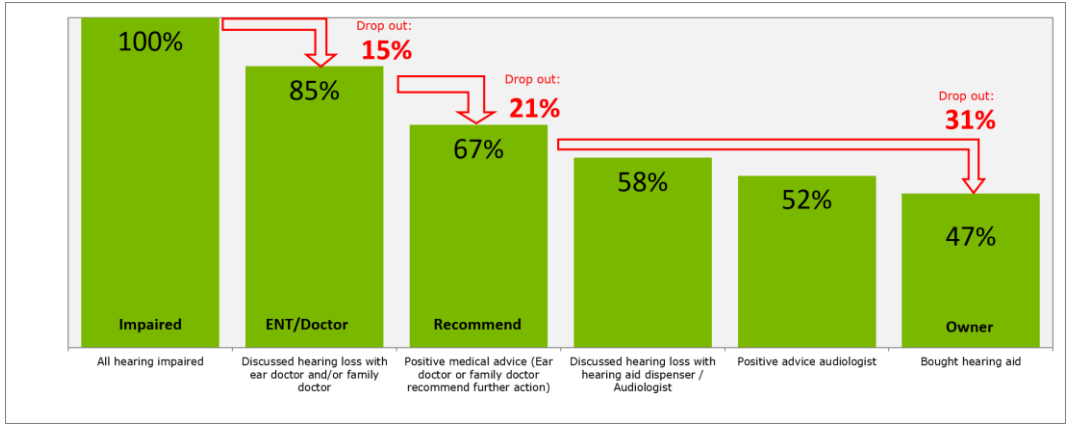


n=1'264

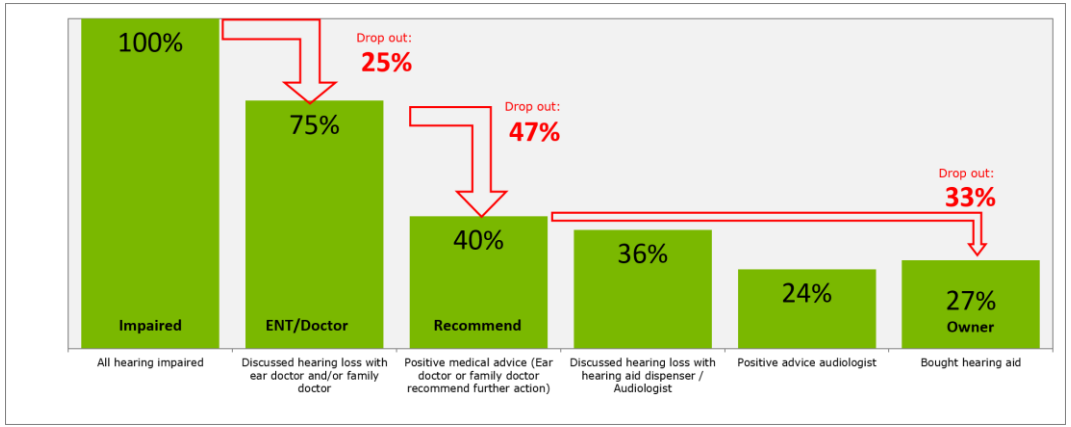
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Much higher drop-out-rates for the lower hearing loss segments in the first two steps

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).

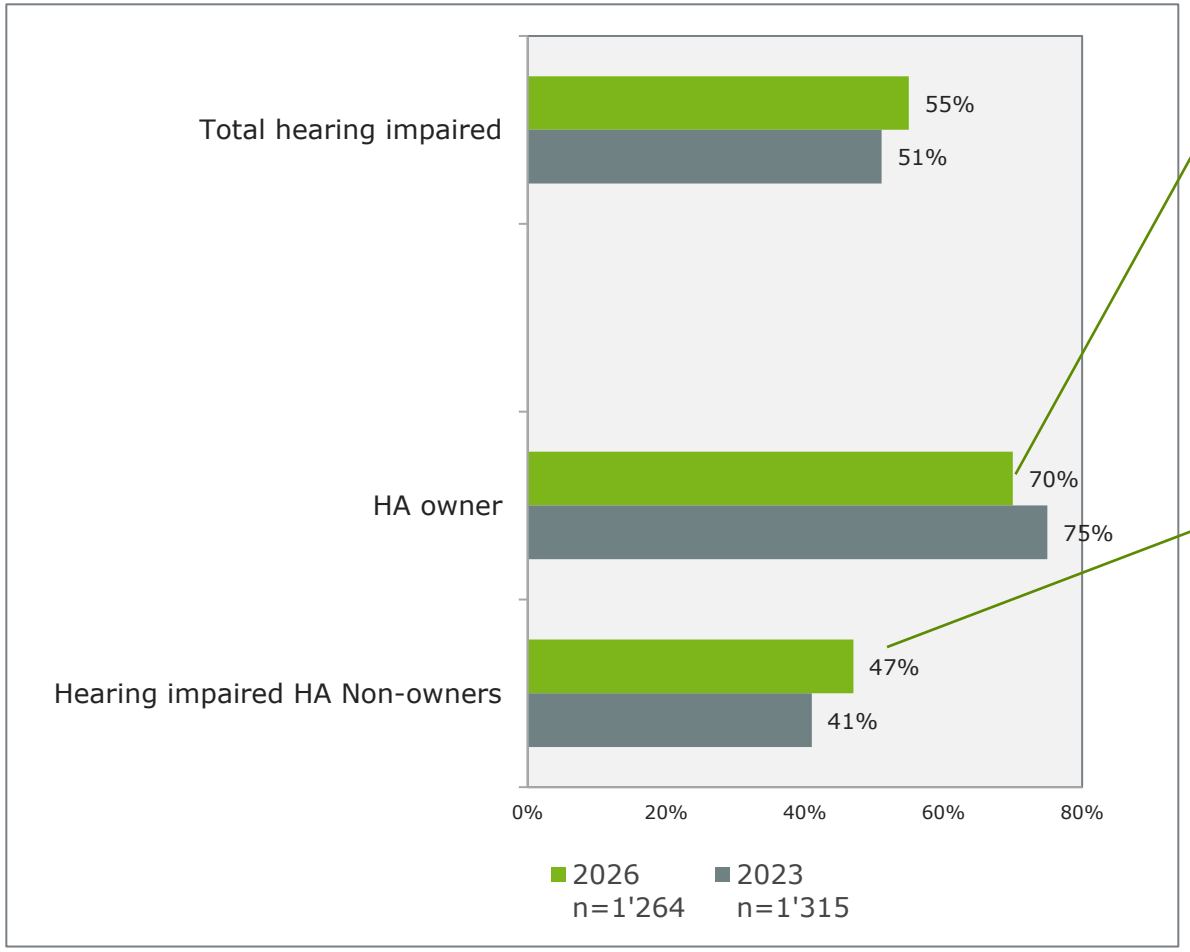
n=1'264

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The route to the hearing aid: GP/Family doctor

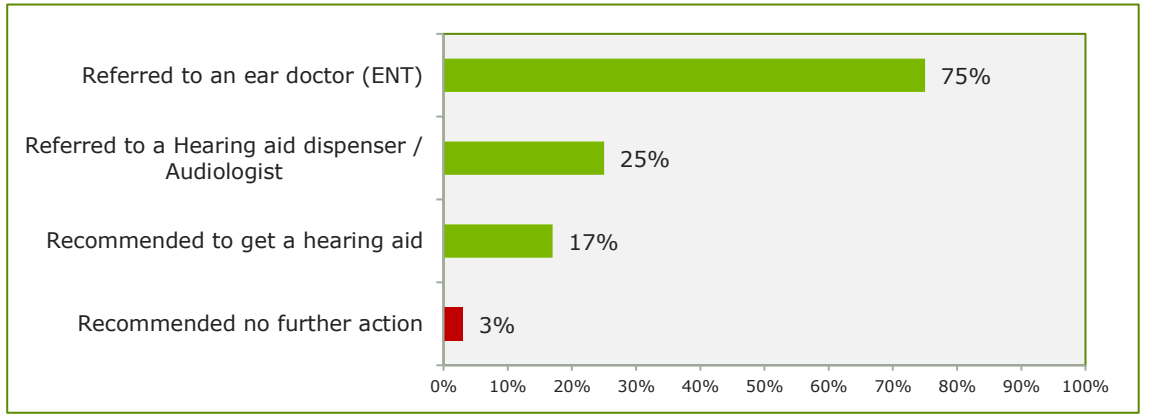
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

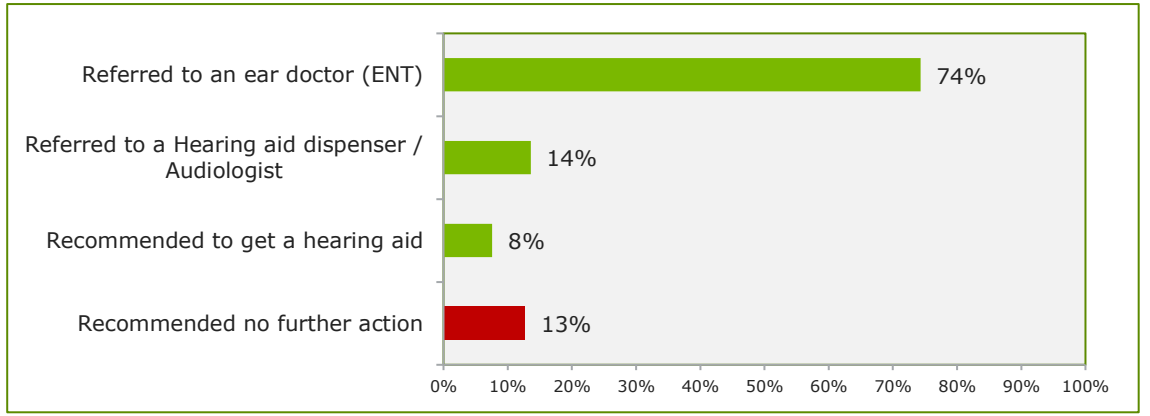


What did he/she recommend?

HA Owner (n=309)



Impaired HA Non-owner (n=322)

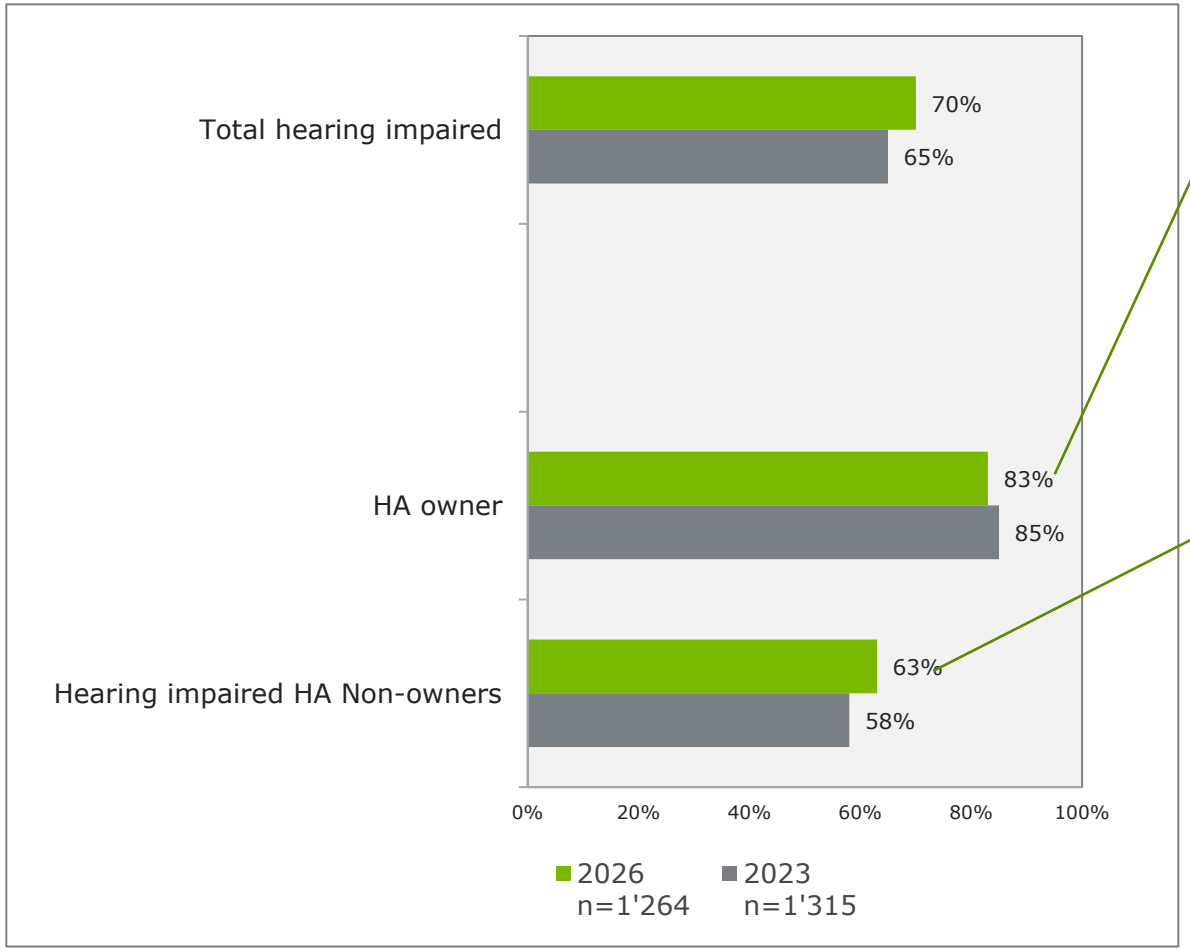


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The route to the hearing aid: ENT

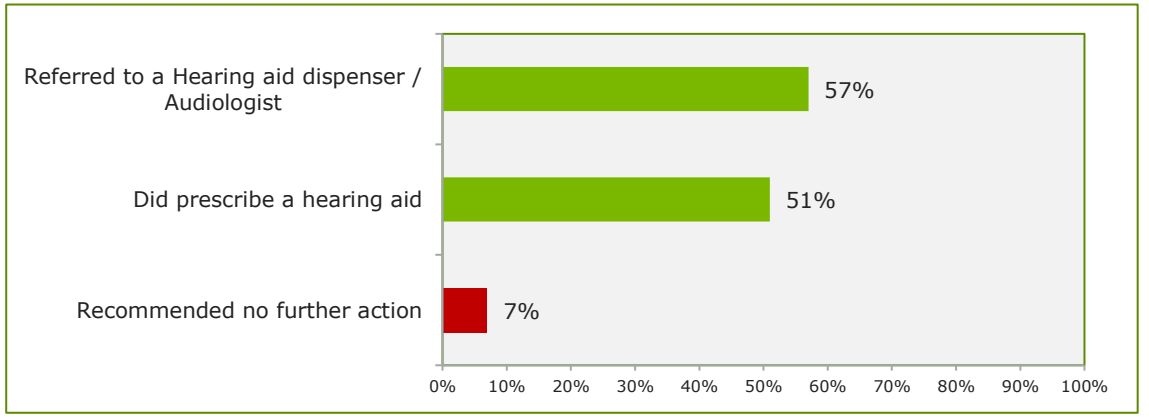
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

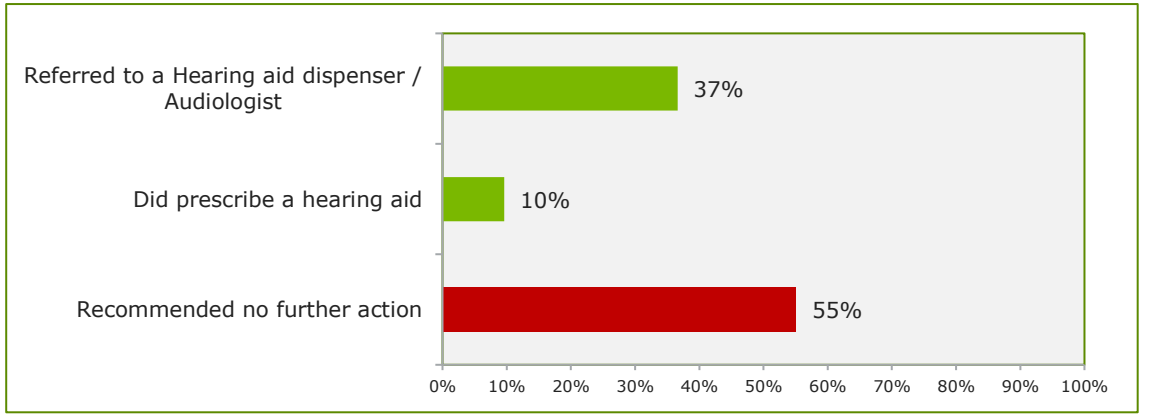


What did he/she recommend ?

HA Owner (n=373)



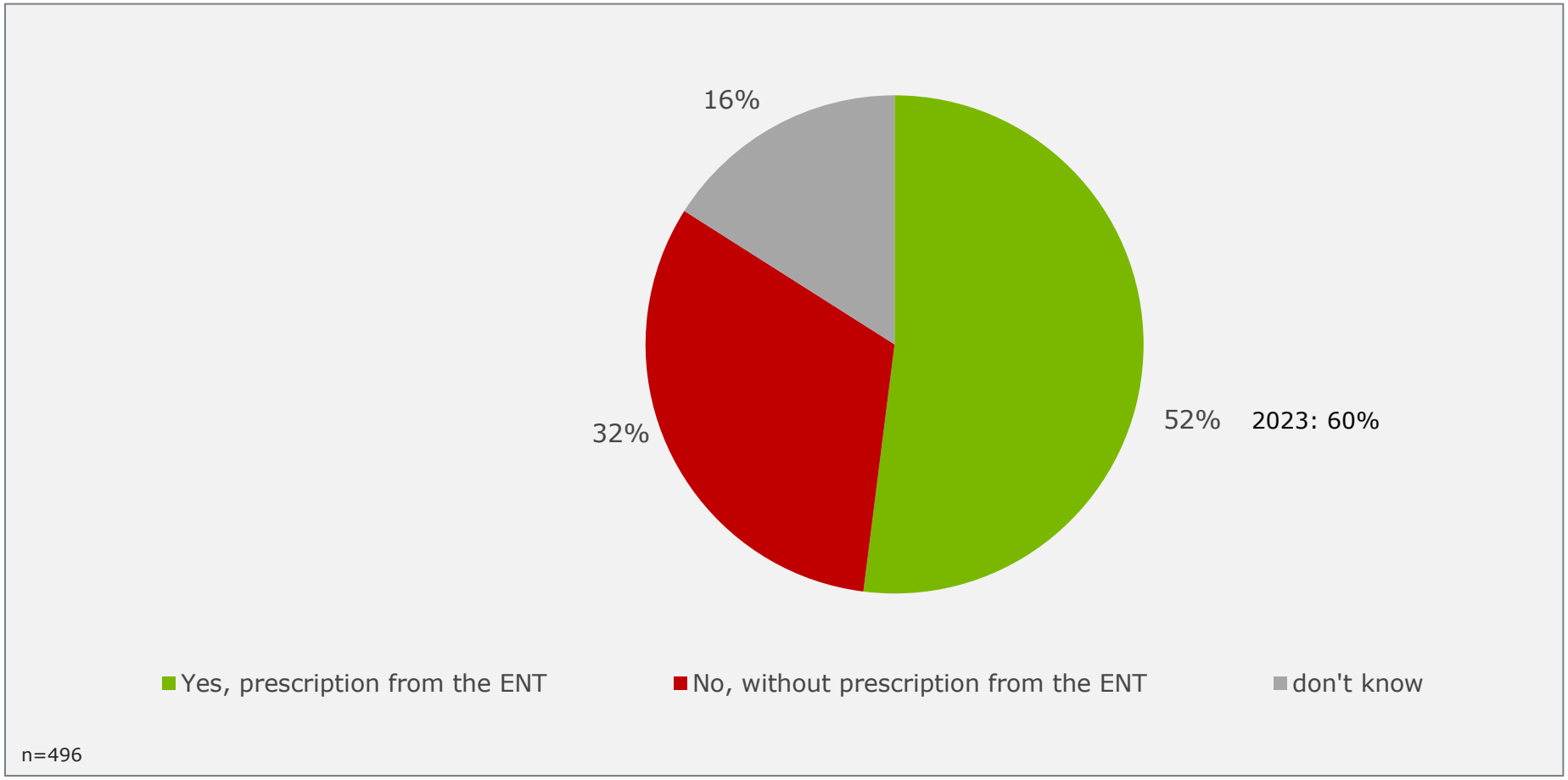
Impaired HA Non-owner (n=461)



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52% have purchased their hearing aid with prescription from the ENT

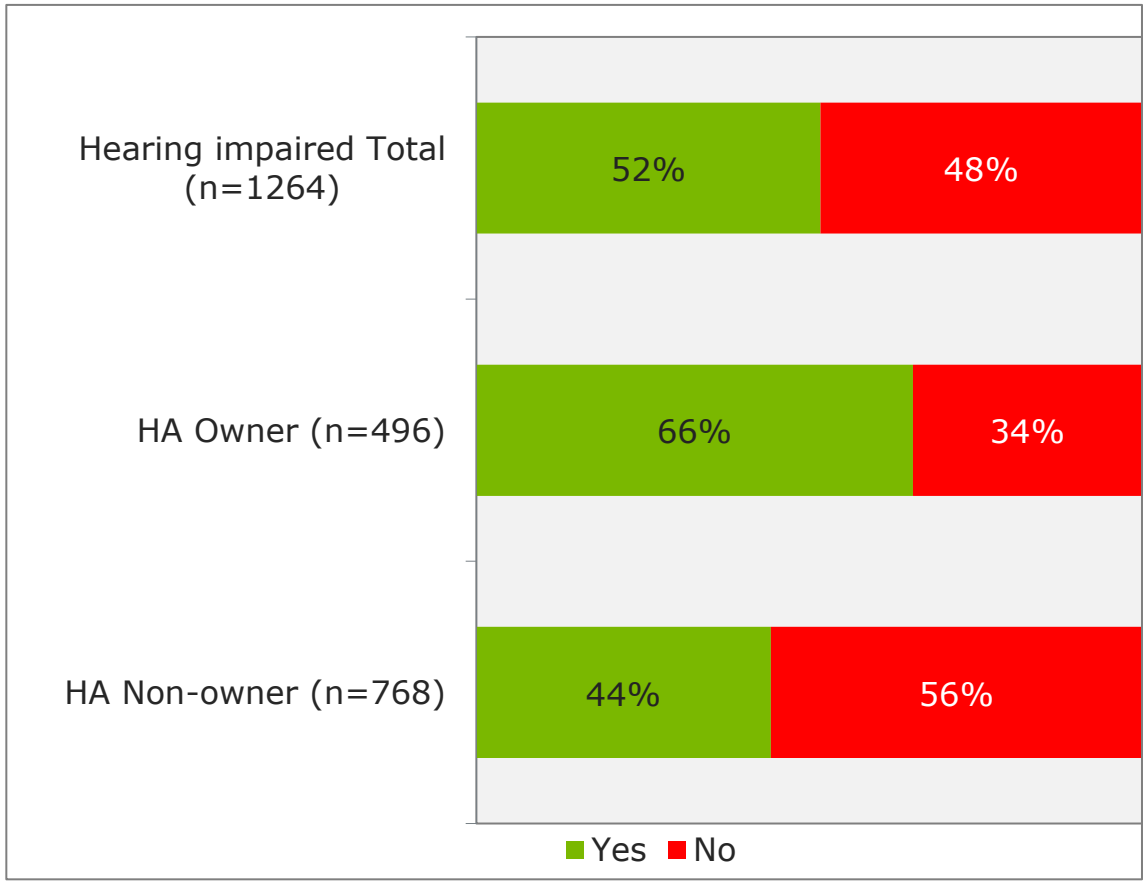
HA-Owner:
Have you purchased your hearing aids with a prescription from your ear doctor (ENT)?



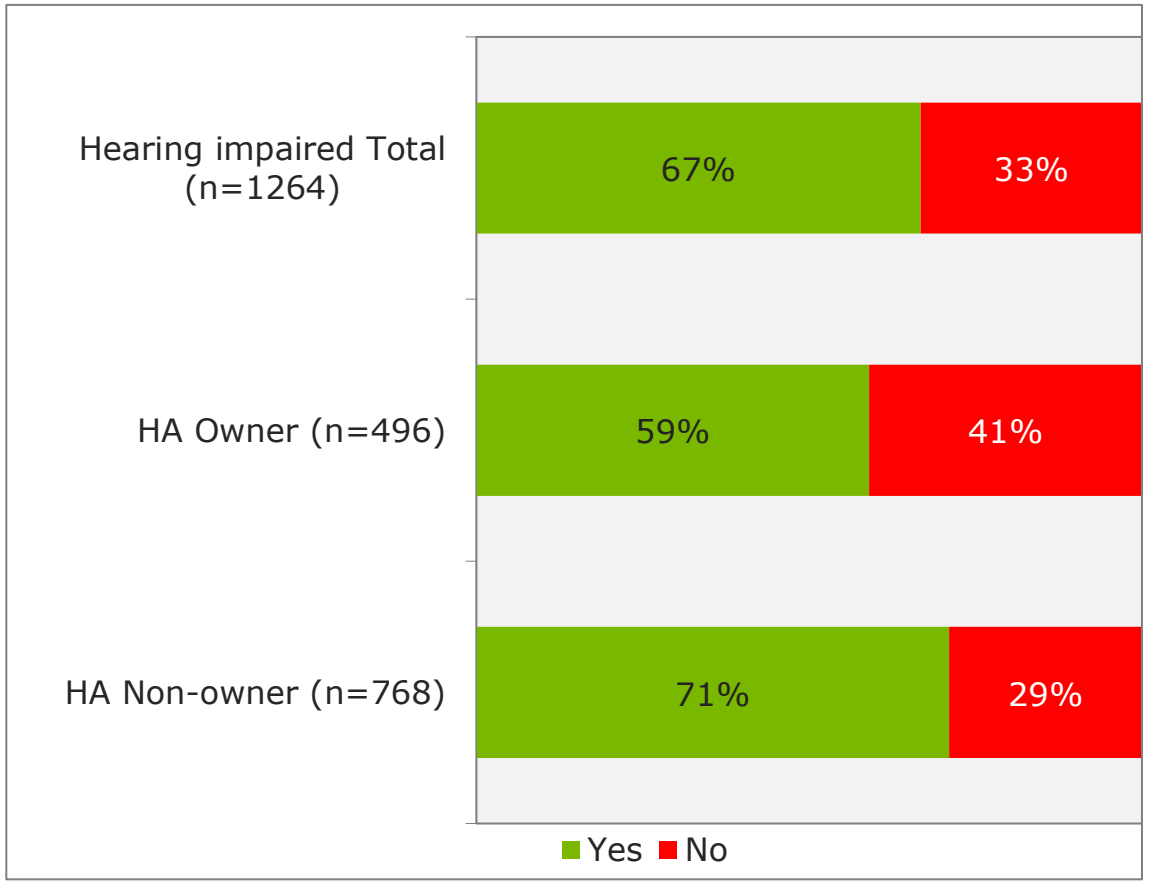
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Awareness of purchase without prescription is limited, yet most assume prescription-based reimbursement means lower cost

Do you know that hearing aids can also be purchased without a prescription from the ear doctor (ENT)?



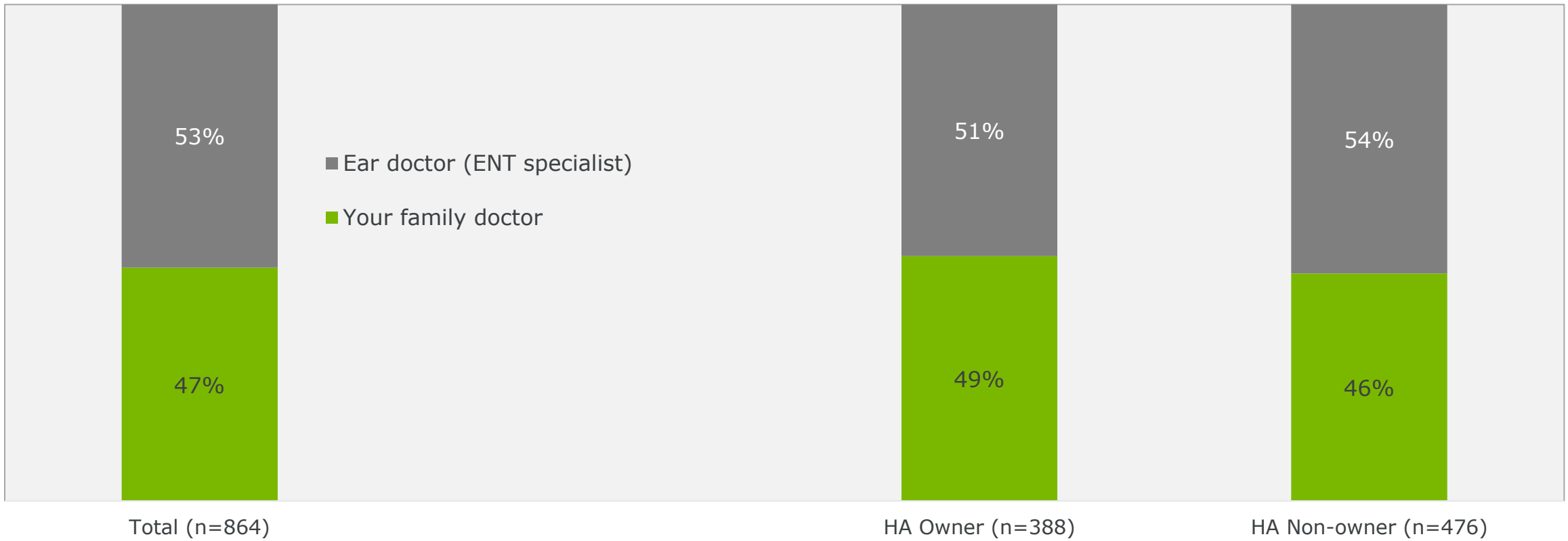
Do you assume that hearing aids are more affordable (cheaper) if you receive reimbursement with prescription from the ear doctor (ENT)?



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Of those who discussed the hearing loss with a doctor, 47% spoke to a GP/family doctor first, and 53% 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)?

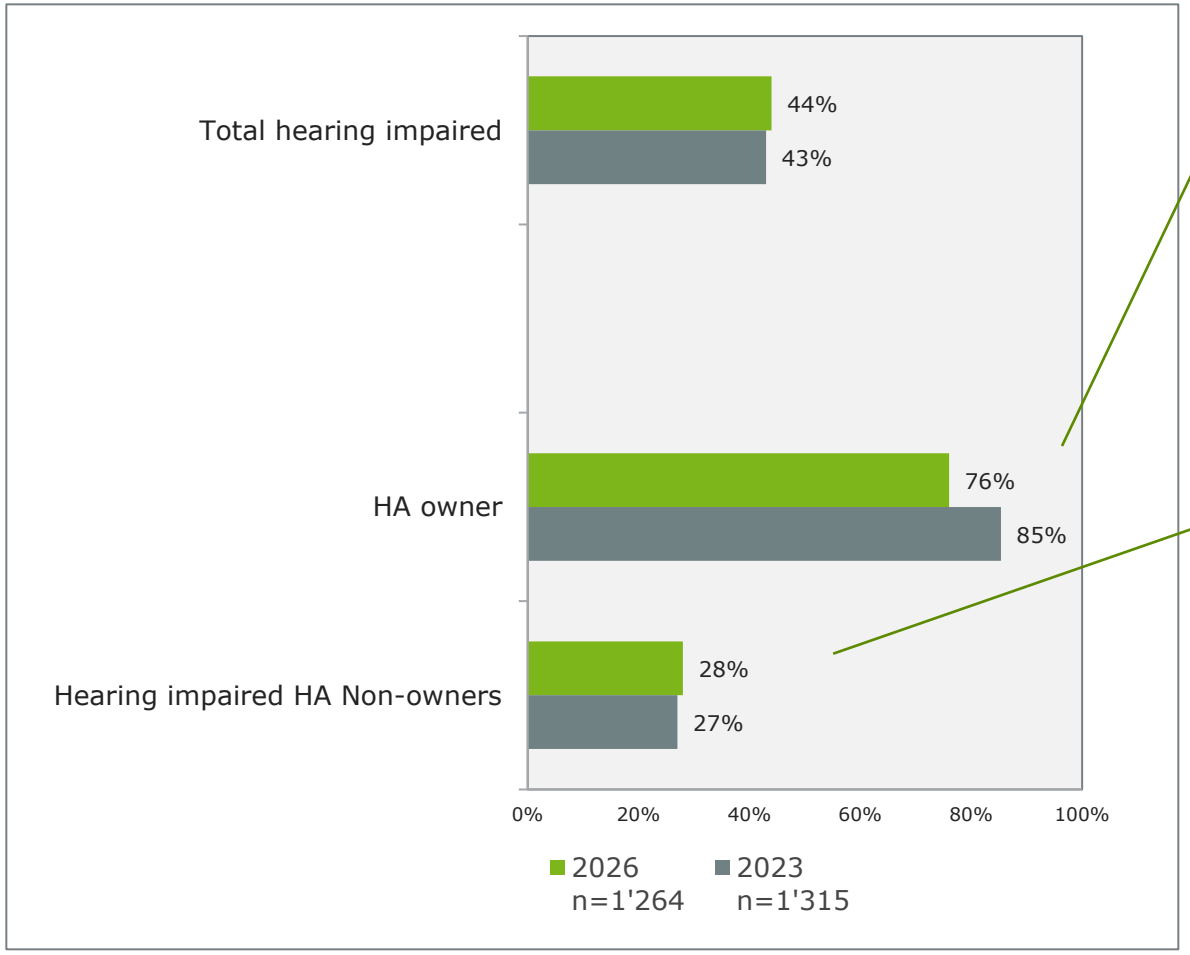


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The route to the hearing aid: Audiologist

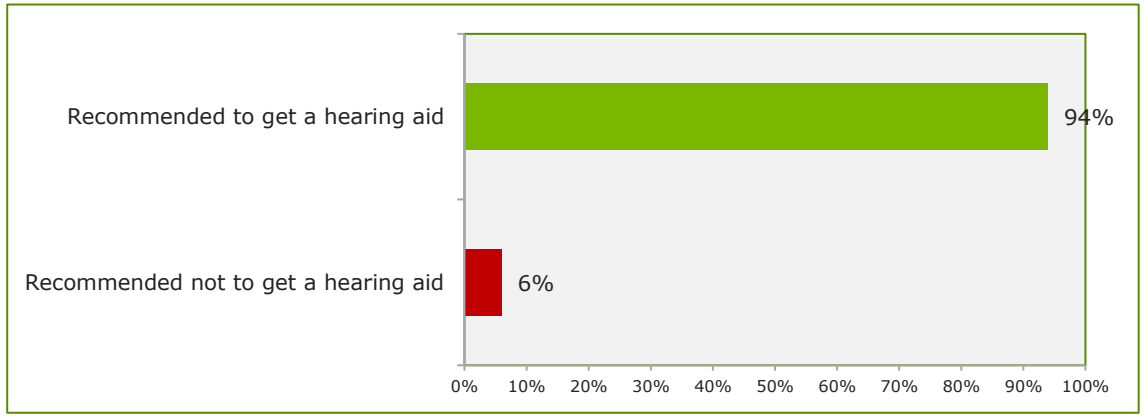
Have you ever discussed your hearing problem with an HA dispenser / Audiologist?

% Discussed with HA dispenser / Audiologist

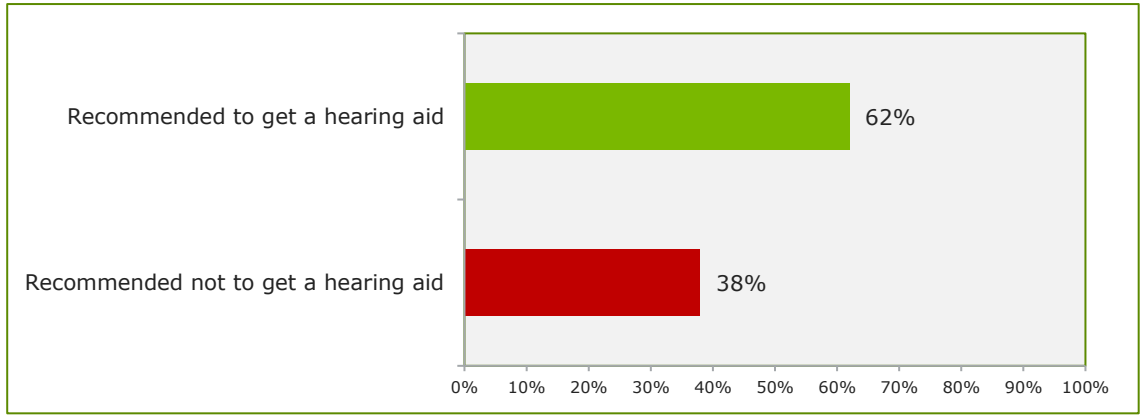


What did he/she recommend ?

HA Owner (n=354)

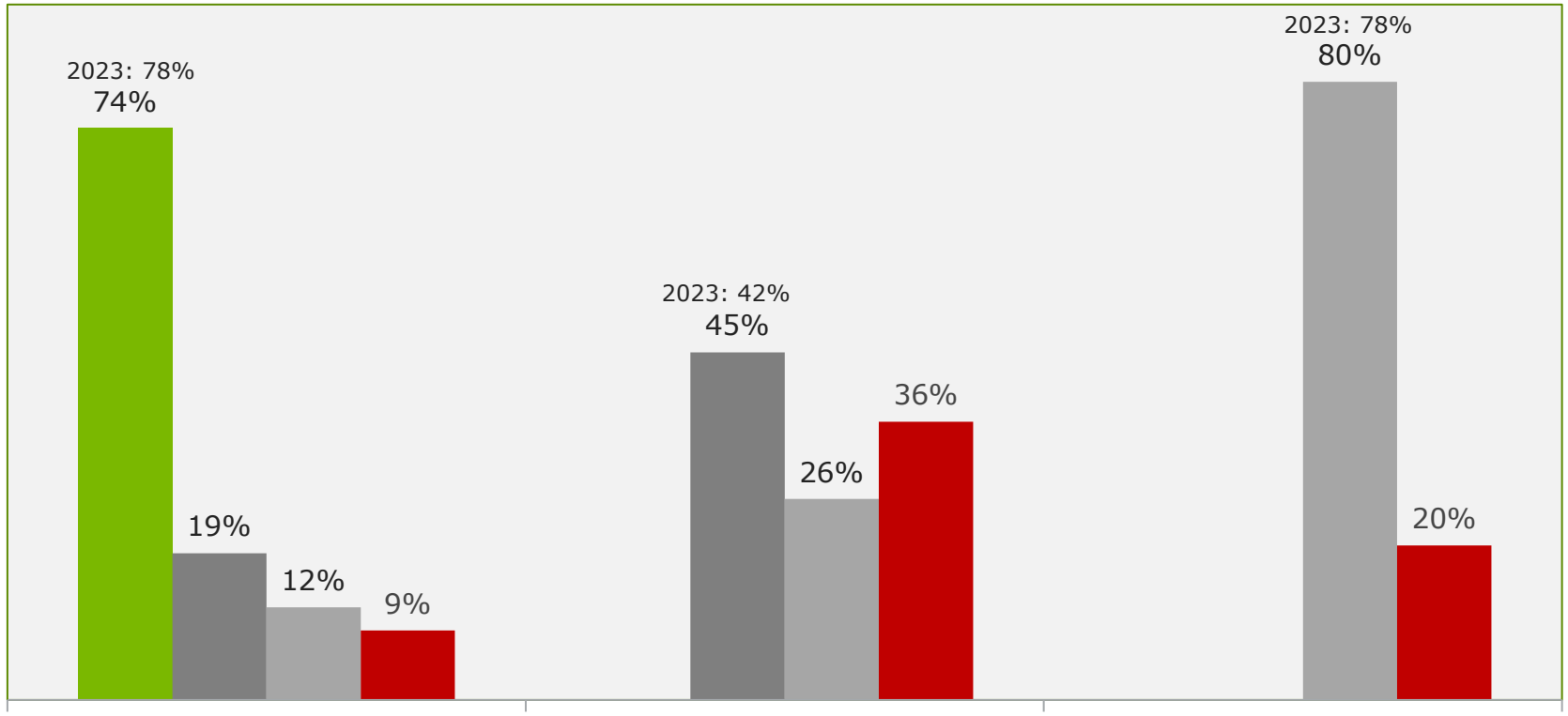


Impaired HA Non-owner (n=201)



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Recommendations by profession



GP n=631
ENT n=834
HA Dispenser n=555

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

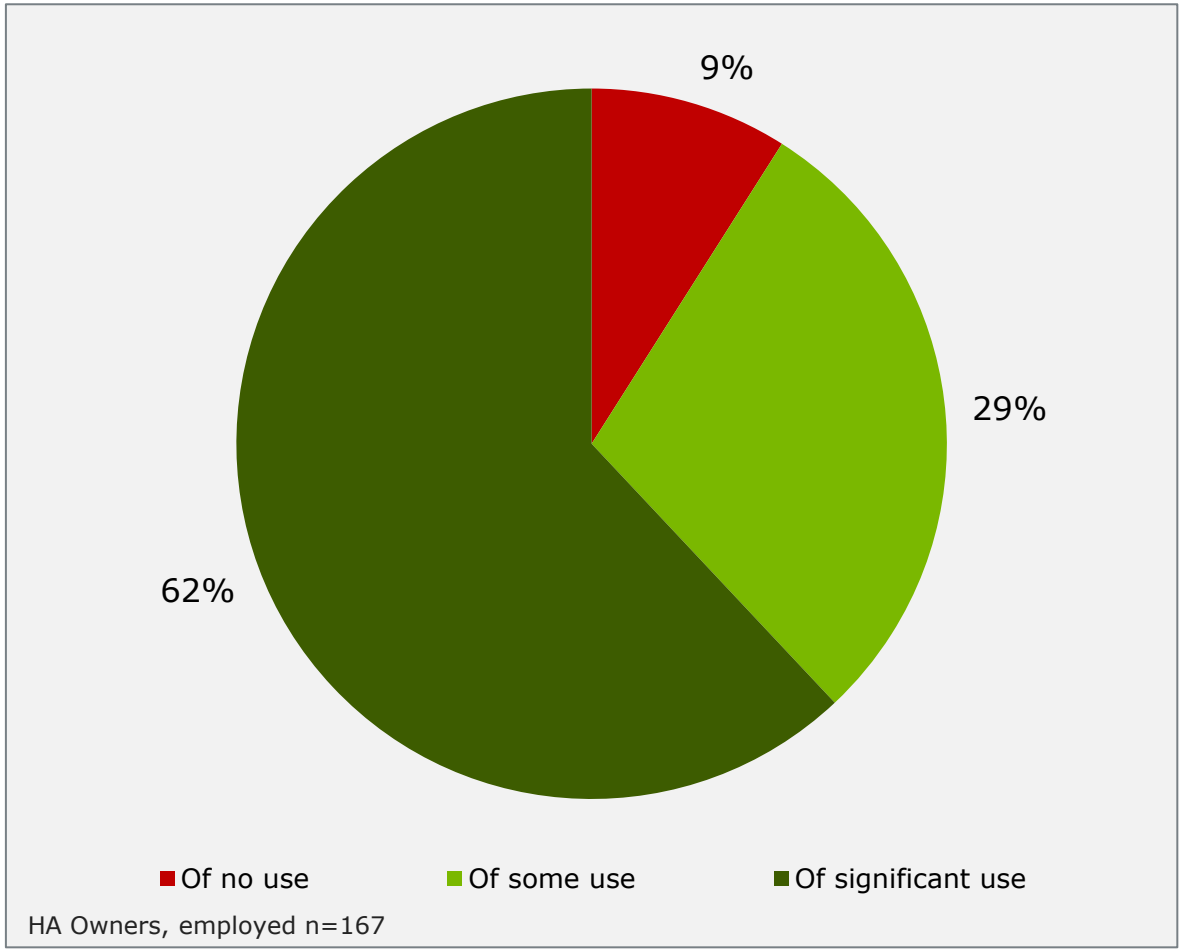
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Potential social cost-savings due to the use of hearing aids:
Work competitiveness, depressive symptoms, co-morbidities

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Work competitiveness: 91% of the working hearing aid owners state that their hearing aid(s) are useful on their job

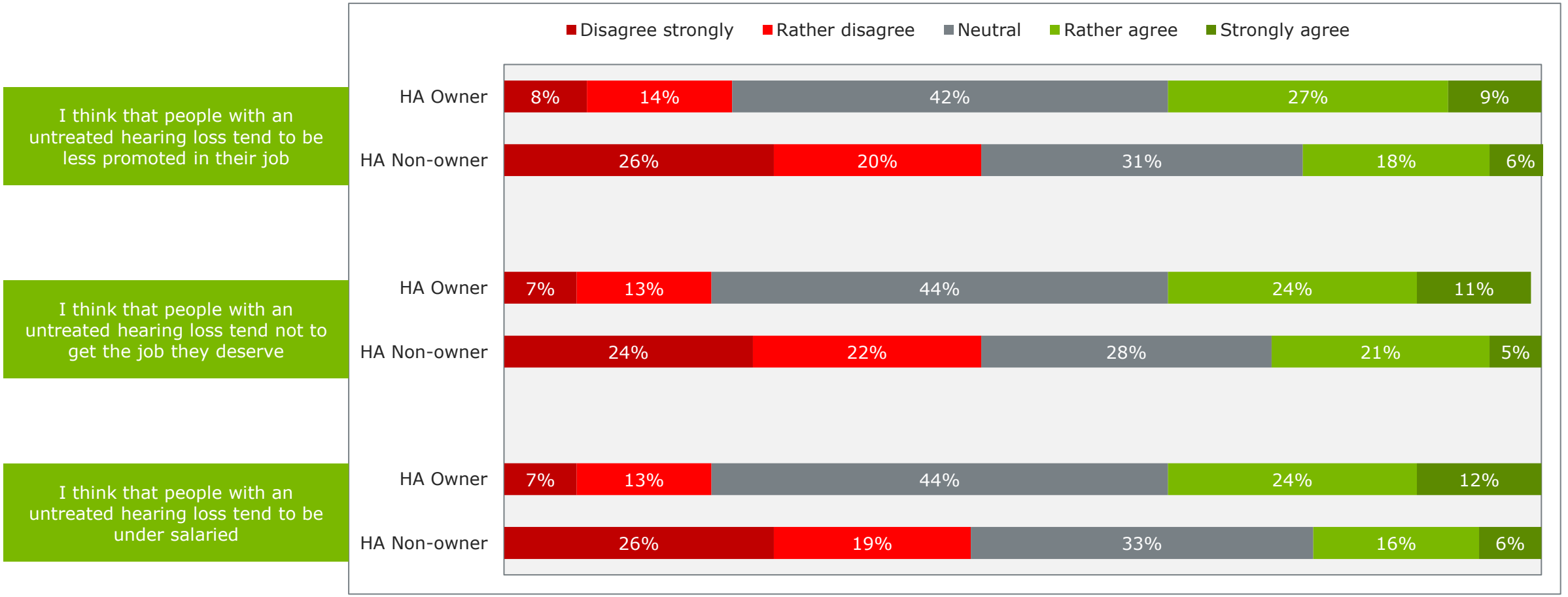
How useful are your hearing aids on your job?



HA Owners, employed n=167

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Work competitiveness: People with hearing aids are more likely to believe that treating hearing loss improves the chances of being promoted, getting the right job and earning a higher salary

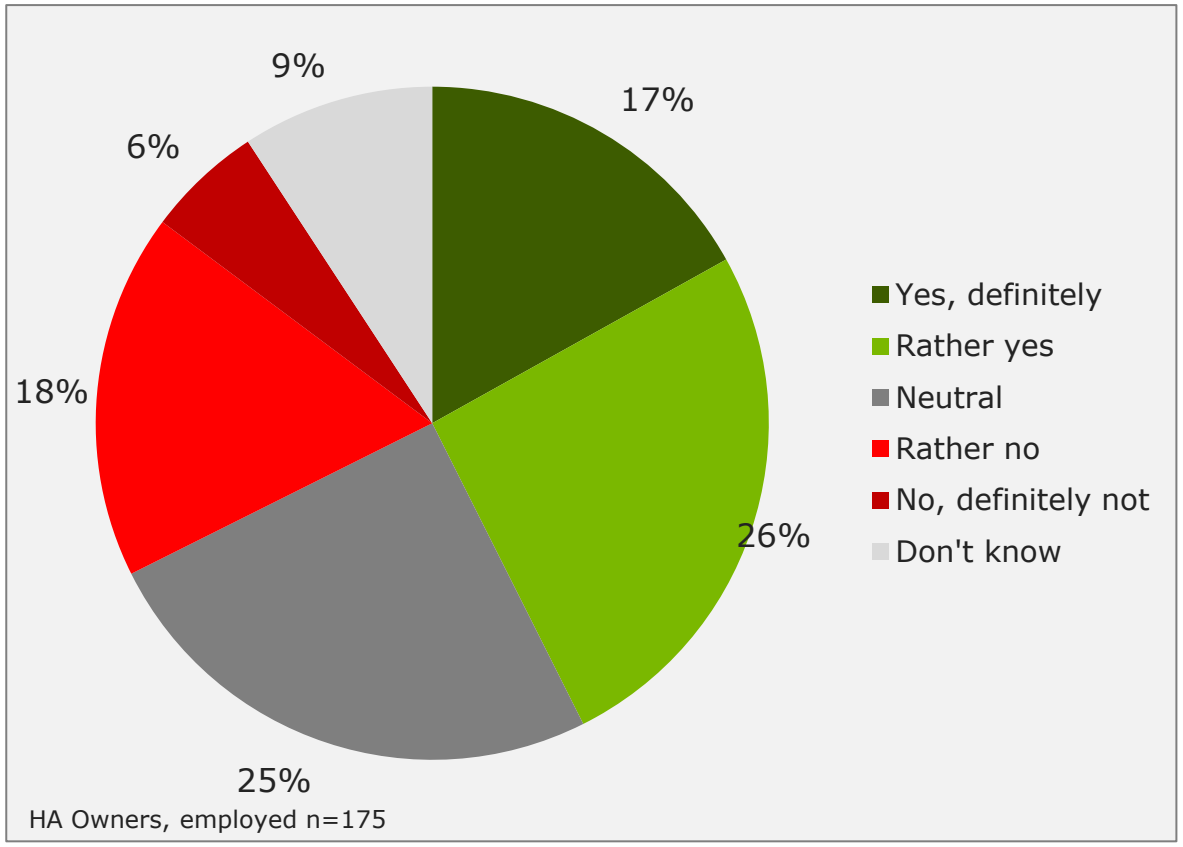


HA Owner n=354 / HA Non-owner n=529

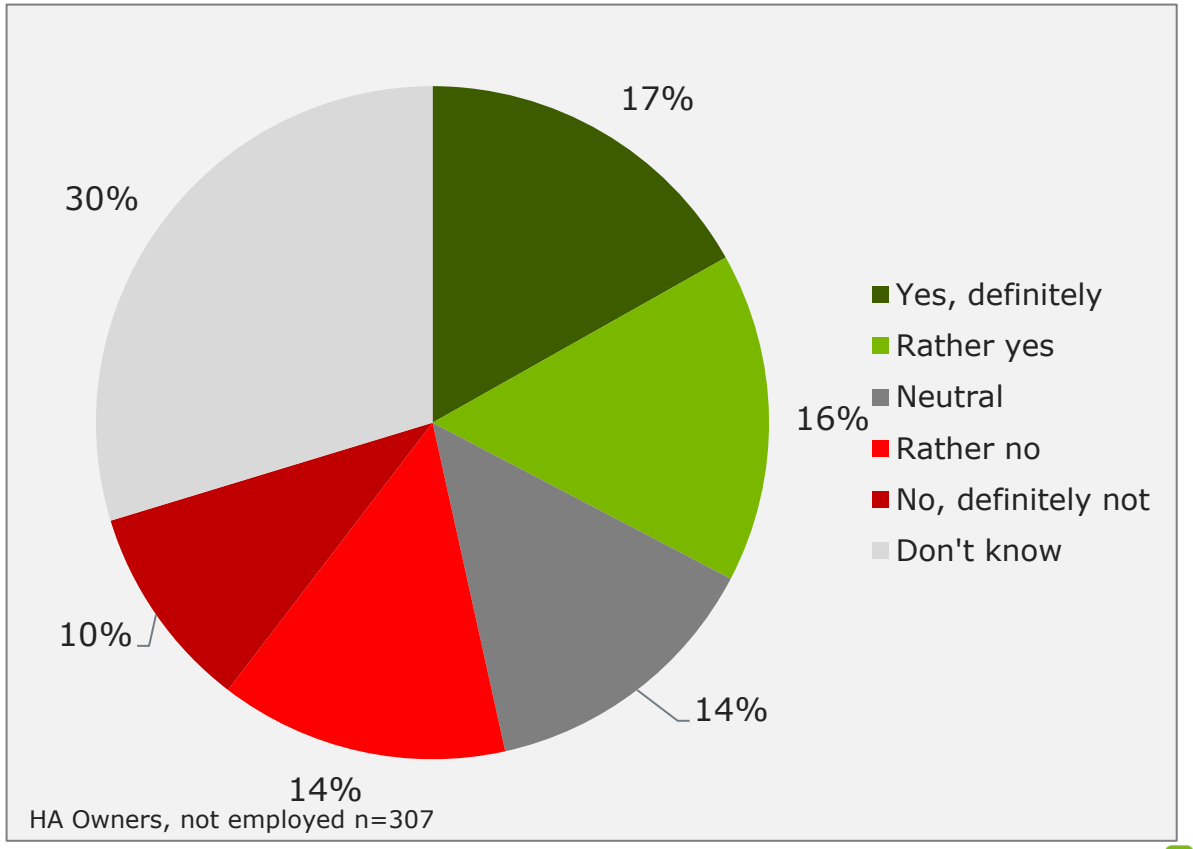
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43% of employed individuals using hearing aids believe the devices enable them to work longer

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



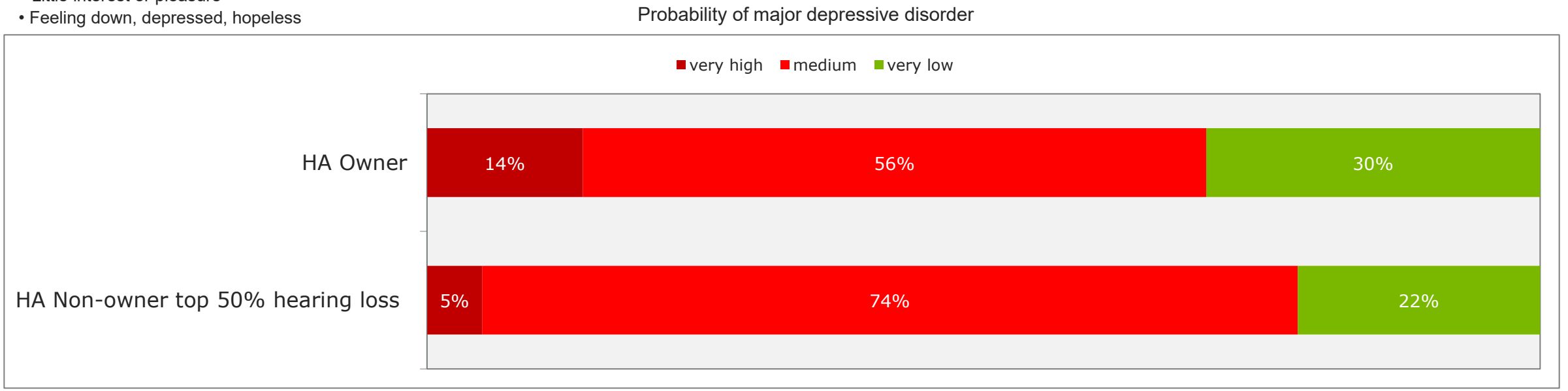
HA Owners, NOT employed:
Do you believe that due to your hearing aid provision you could have been employed longer than without hearing aid(s)?



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General health problems: Hearing aid owners are slightly more likely to have a low probability of depression (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



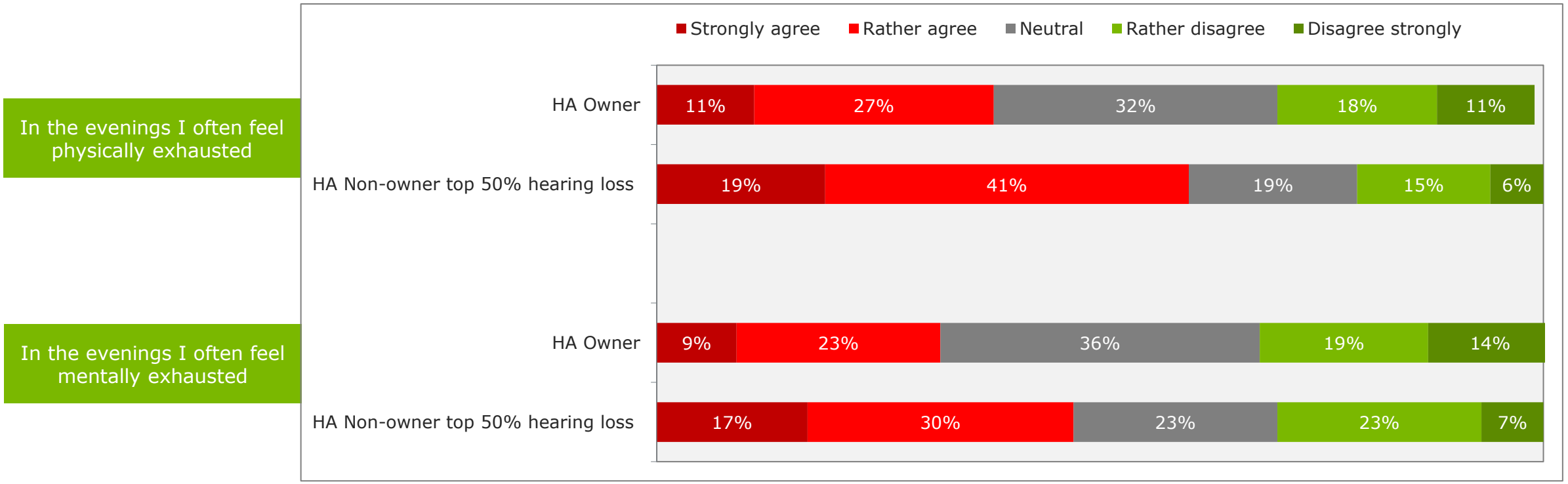
HA owner n=347 / HA Non-owner top 50% hearing loss n=155

*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).

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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=339 / HA Non-owner top 50% hearing loss n=154

*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:

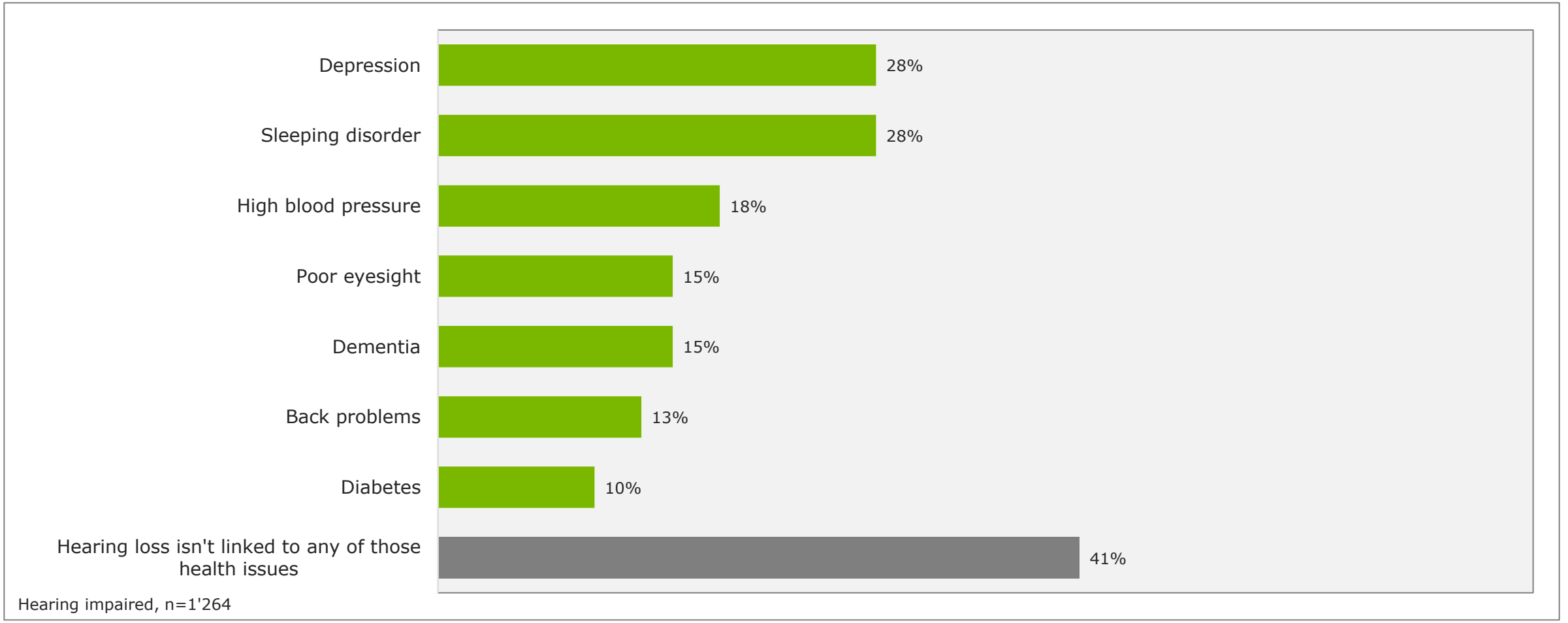
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC – like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

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

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28% of all hearing-impaired think that hearing loss could be linked to depression or sleep disorders.

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



Hearing impaired, n=1'264

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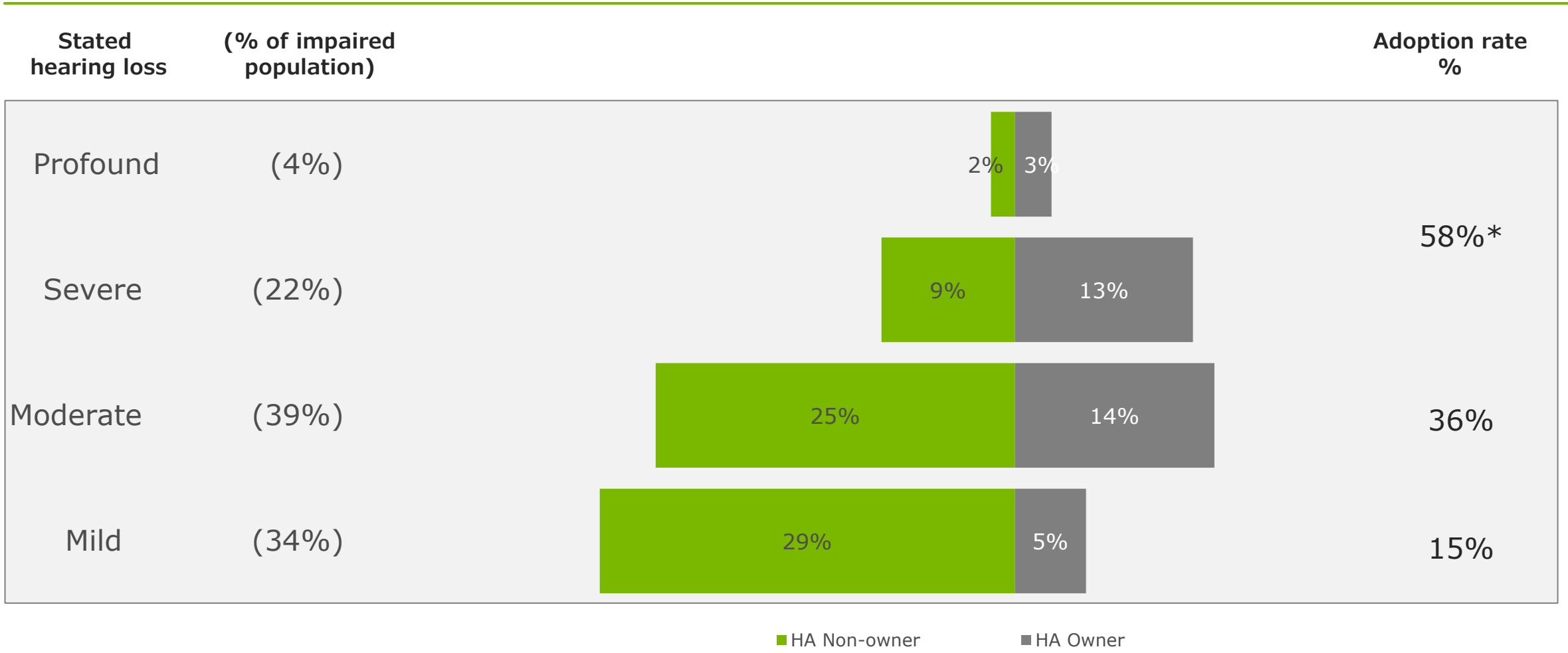
3. Analysis of hearing aid owners

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

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Low adoption rates within mild hearing loss



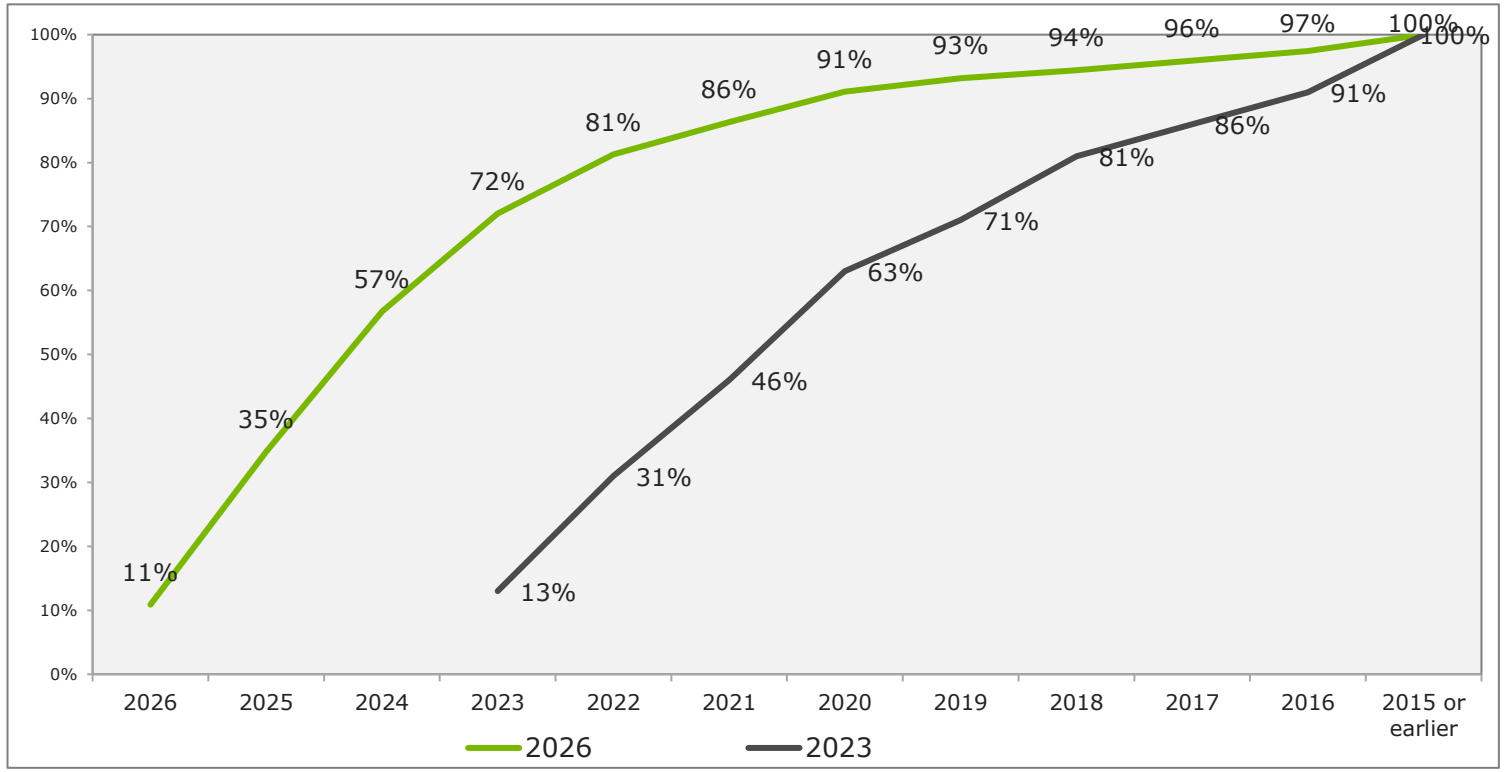
n=1'264

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

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57% of the currently owned HAs were acquired in 2024 or later: RICs are the most often purchased type of HA

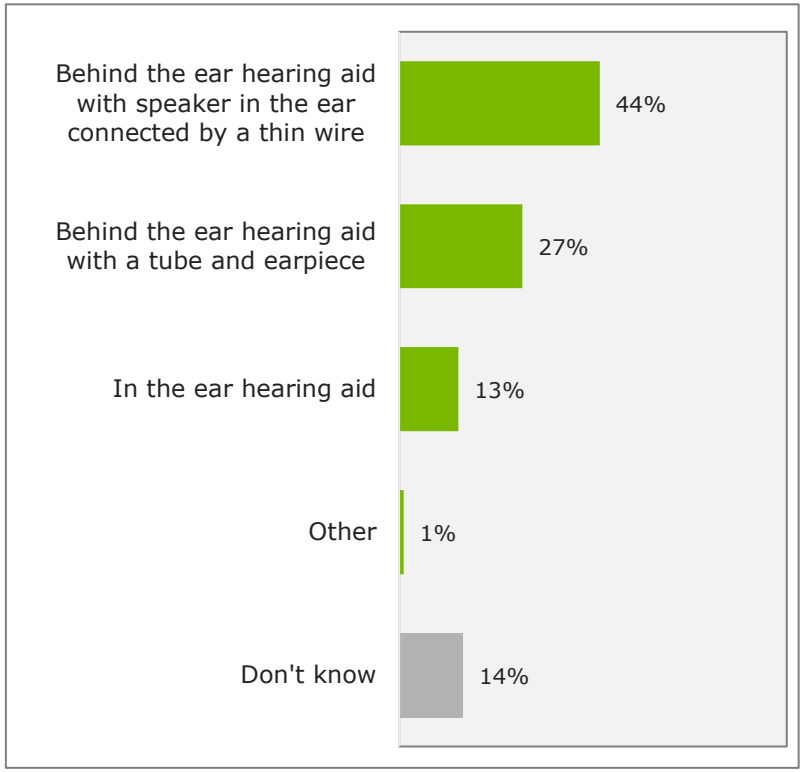
HA Owner: When was the most current hearing aid purchased? (Year)



HA Owner n=496

Age of currently owned HAs (Mean):
2026: 3.1 years
2023: 3.8 years

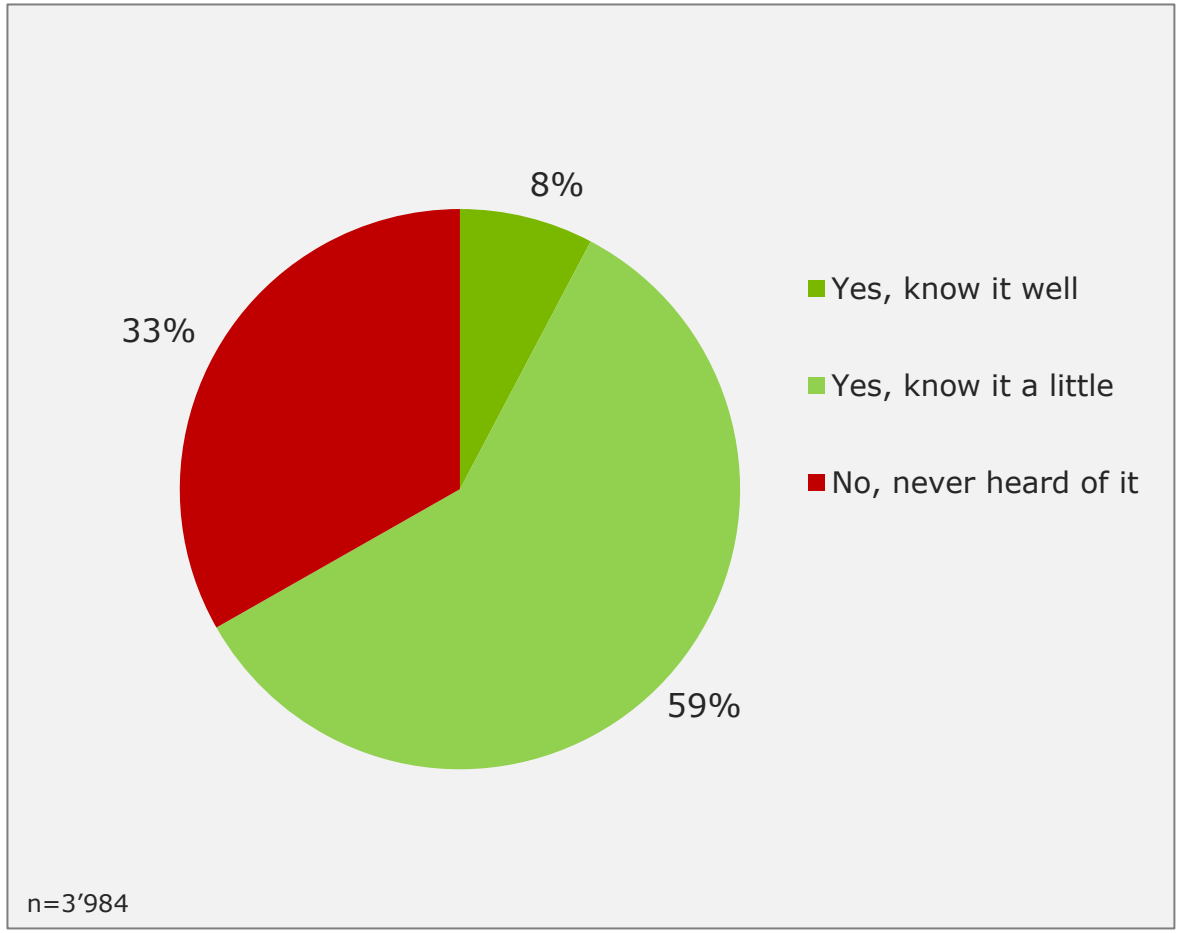
What type of hearing aid do you own?



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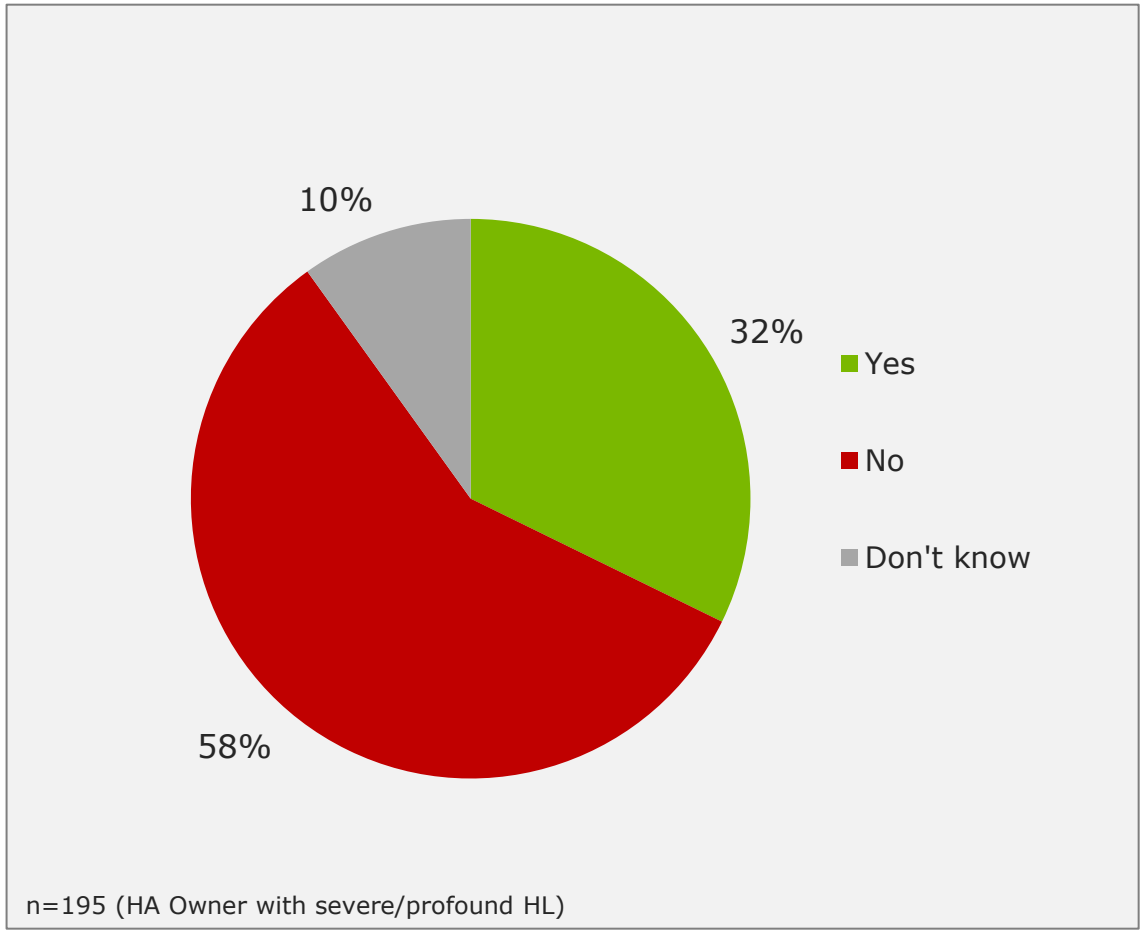
33% of the population has never heard of Cochlear Implants

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



n=3’984

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

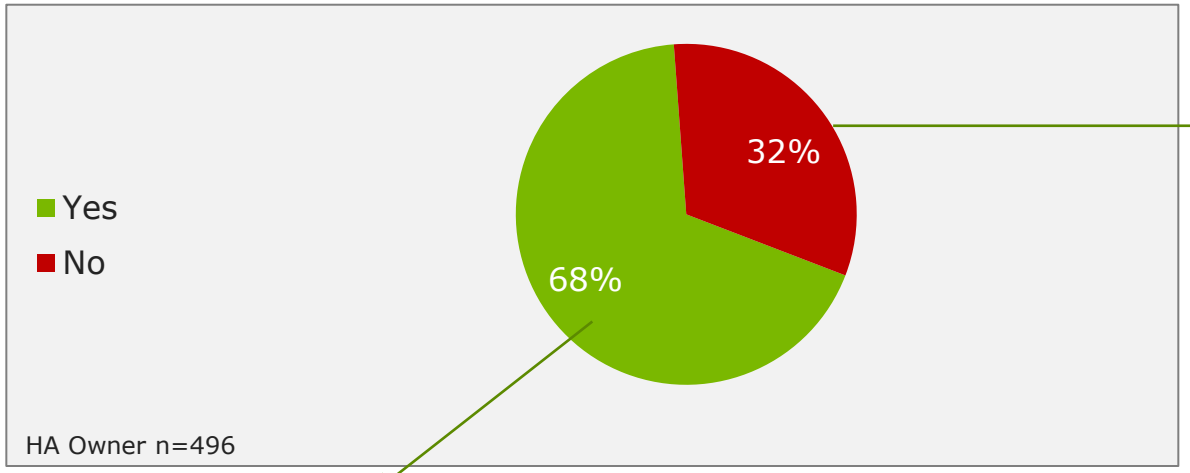


n=195 (HA Owner with severe/profound HL)

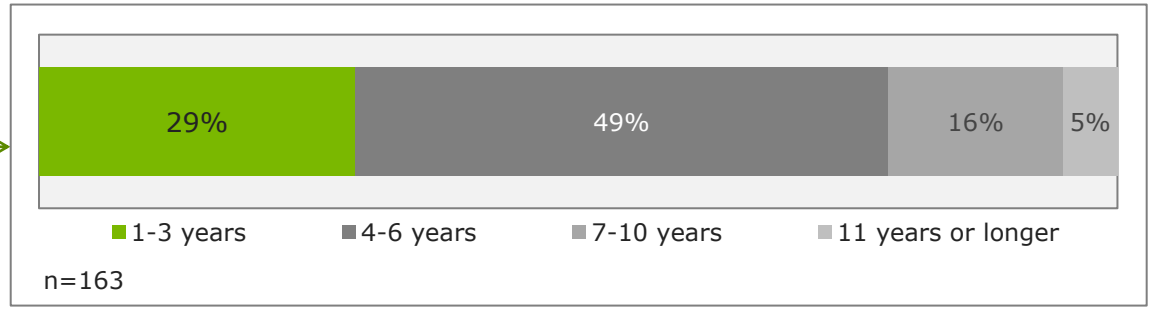
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Hearing aids are used for five years before they are replaced. Mostly 2-6 years pass between becoming aware of the hearing loss and purchasing hearing aids

HA Owner: With your current hearing aid(s) is it the first time you own or use hearing aids?

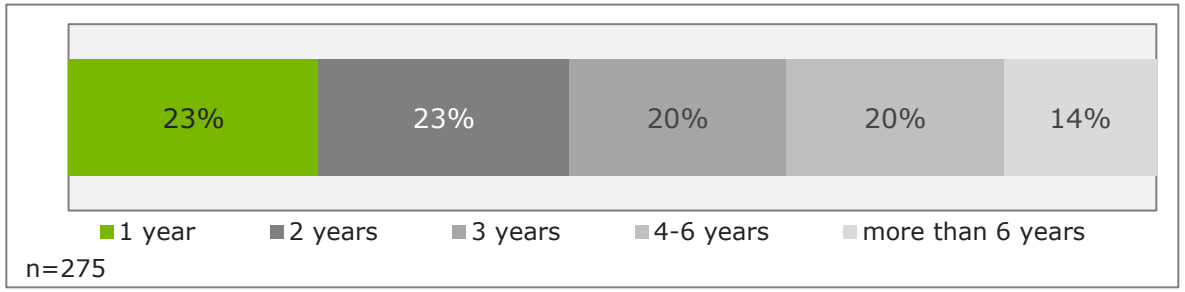


How many years did you own your previous HAs?



Age of HA before it has been replaced:
2026: 5 years (median)
2023: 5 years (median)

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



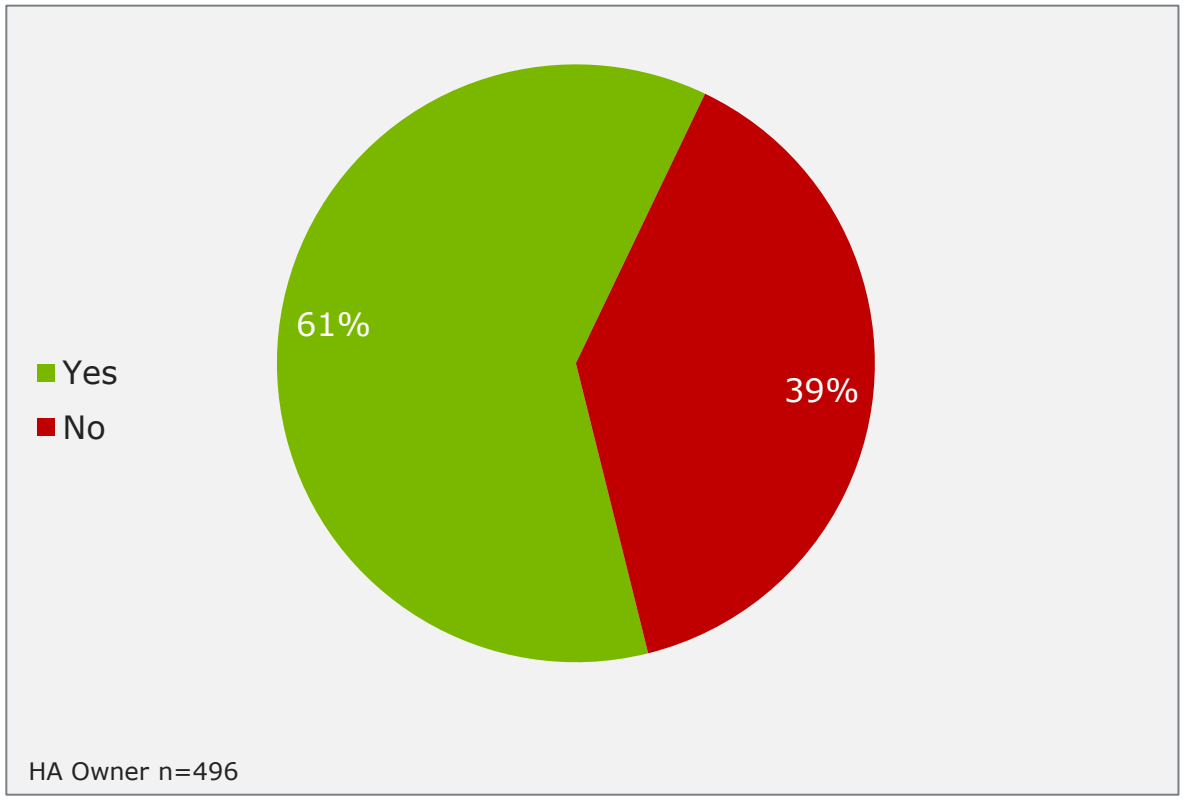
HA Non-owner:
How many years had passed since you became aware of your hearing loss?



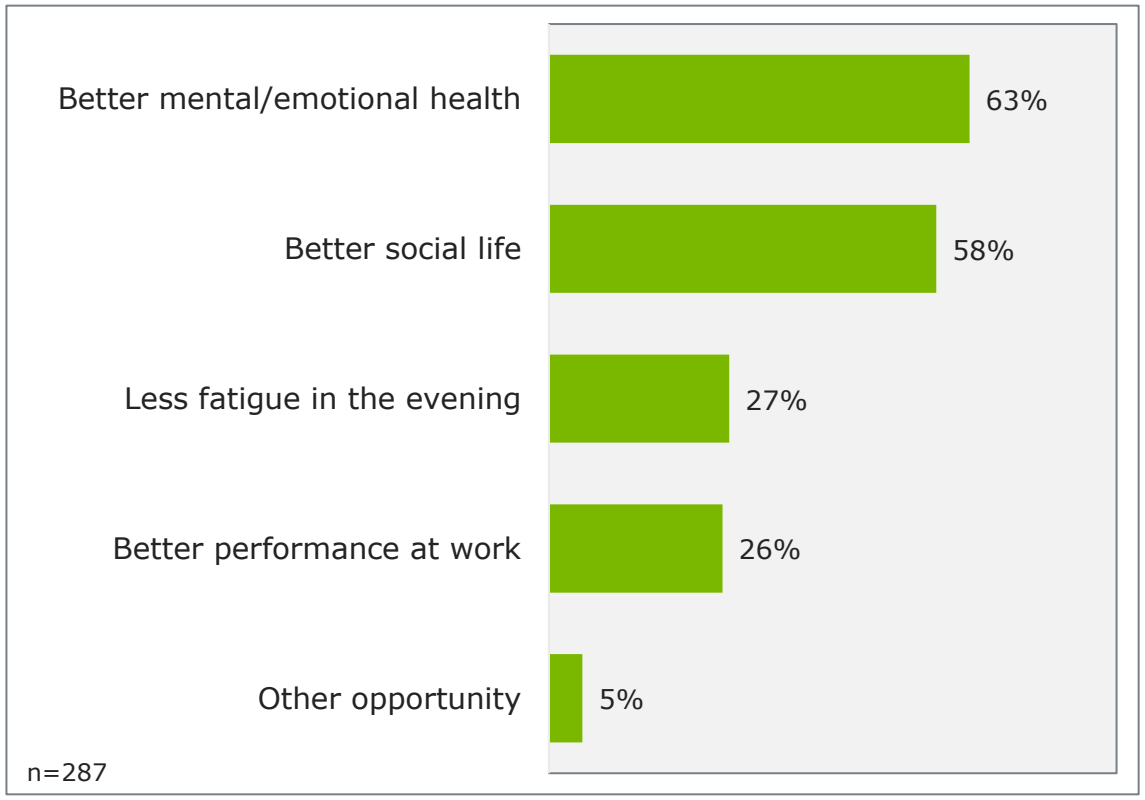
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61% of all HA owners say they should have gotten hearing aids sooner, mainly because of missed benefits to mental/emotional health and social life.

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



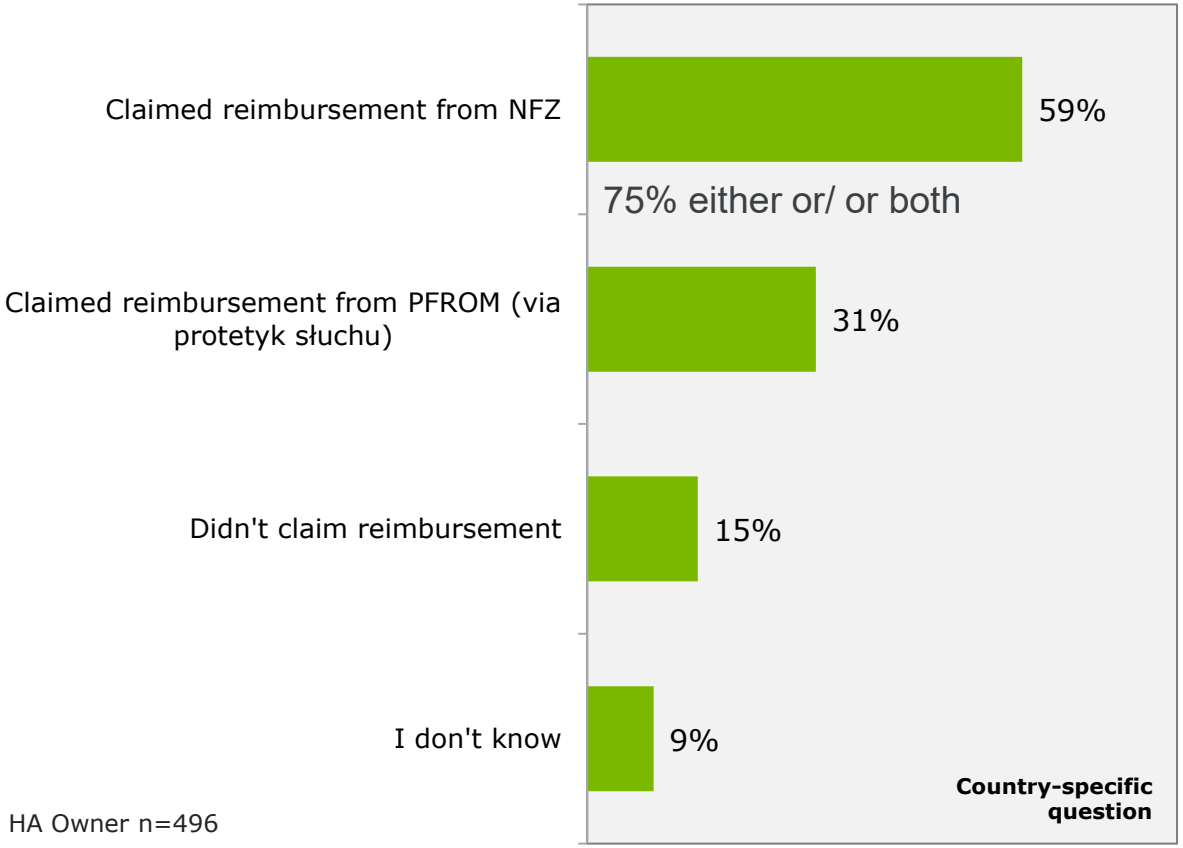
IF YES:
What are the reasons why you think you should have gotten your hearing aid(s) sooner? What are the opportunities you think you have missed because of this? Please tick all that apply.



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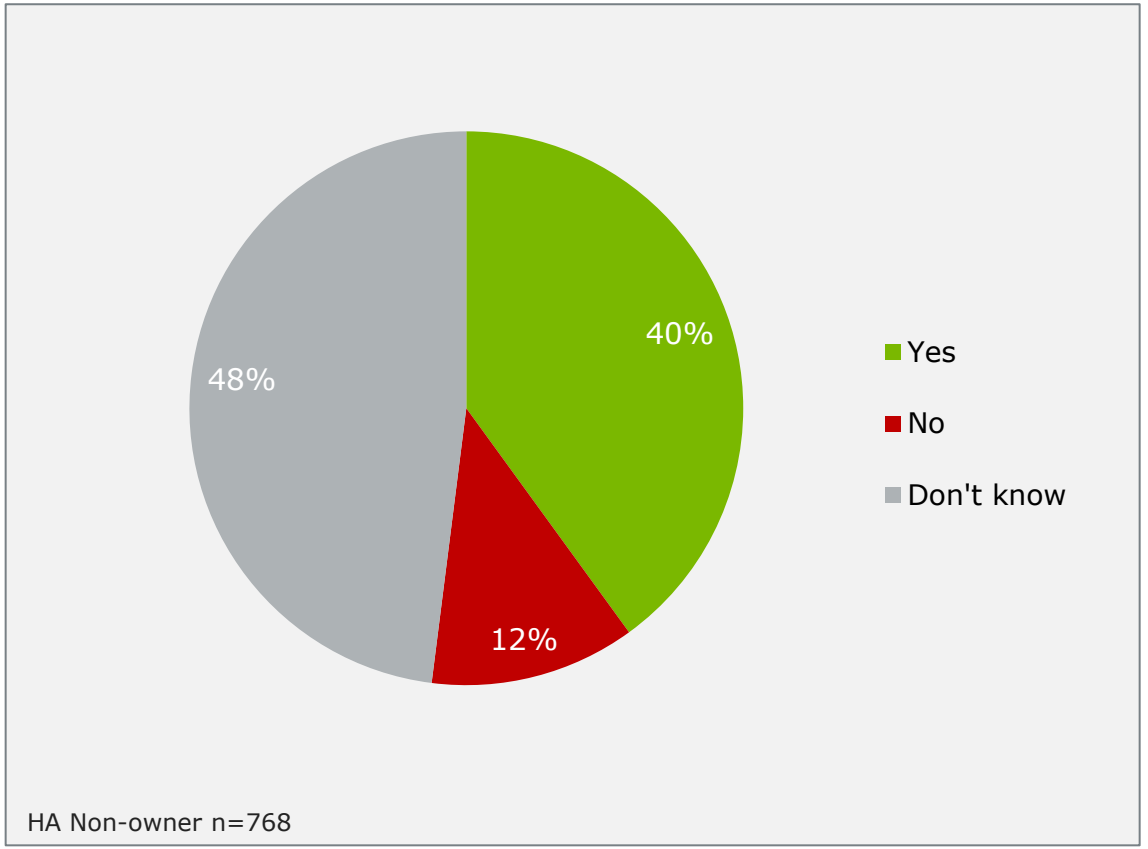
75% of the hearing aid owners received some kind of third party reimbursement. 48% of non-owners don't know whether they would receive any reimbursement, and 12% think there is nothing.

HA Owner:
Have you benefited from funding for hearing aids from NFZ and / or PFRON? (multiple answers possible)



HA Owner n=496

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?

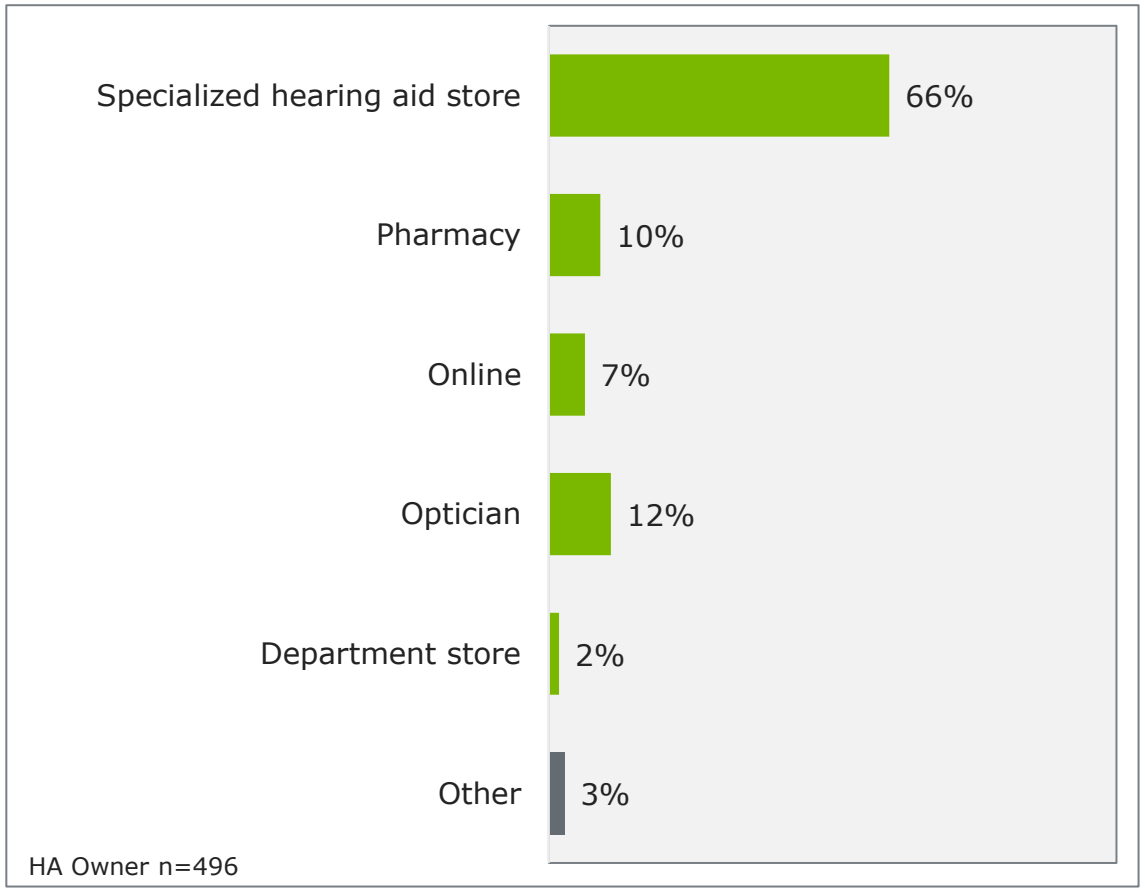


HA Non-owner n=768

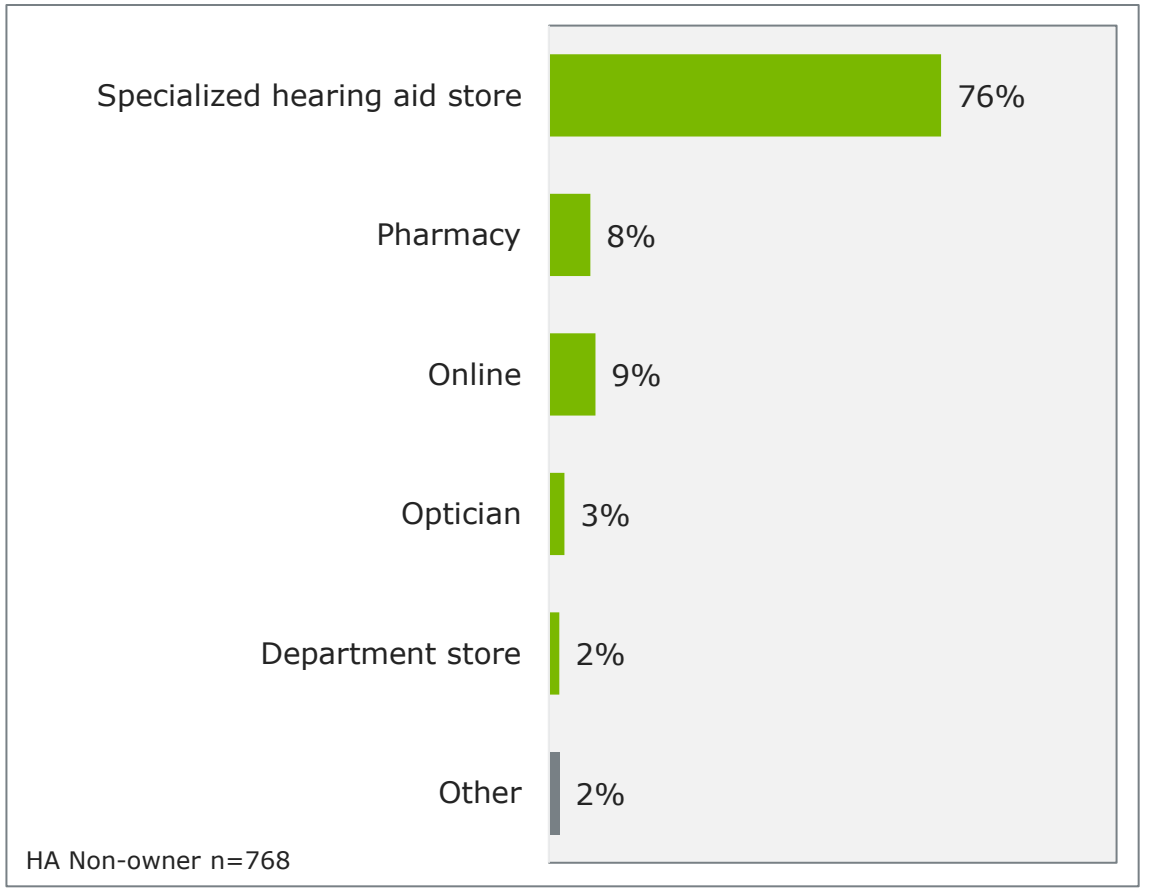
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A specialized hearing aid store is the preferred place for obtaining hearing aids (both for owners and non-owners)

HA Owner:
Where was your most current hearing aid obtained?



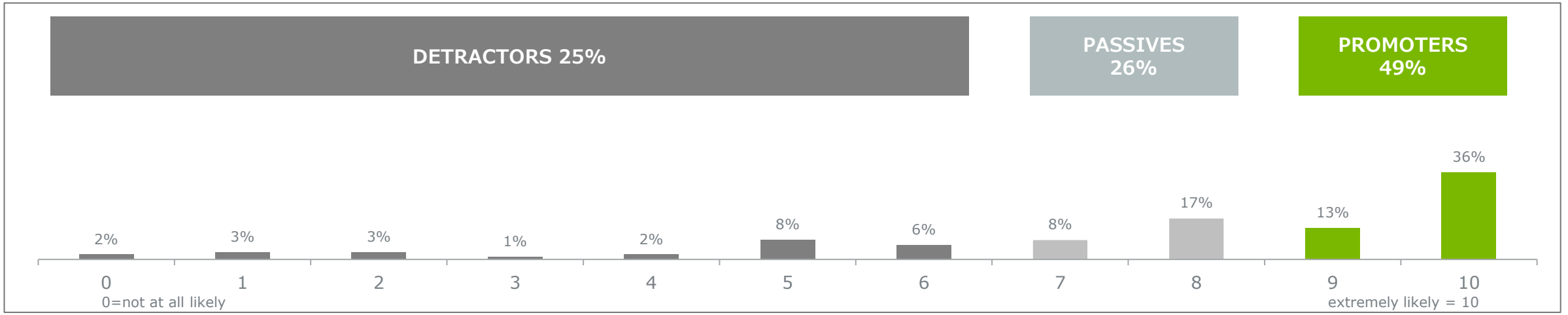
HA Non-owner:
If you were to get hearing aids, where would you go?



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Recommendation intention of the place where the hearing aid(s) have been obtained: Positive NPS score of 24

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



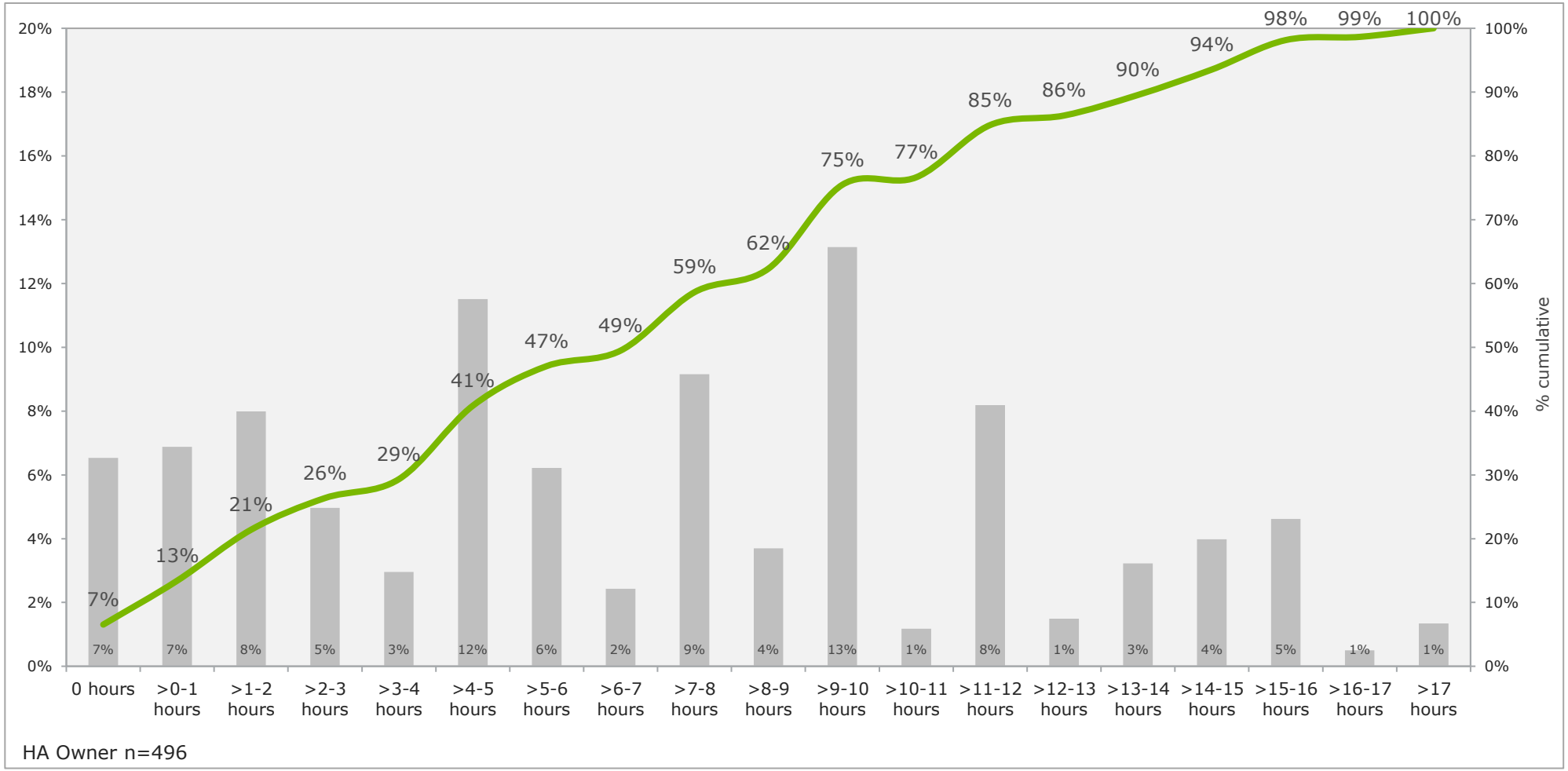
NPS = PROMOTERS – DETRACTORS = 24 (2023: 18) (exact figure rounded)

HA Owner n=496

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On average, HAs are worn 7.4 hours a day

HA Owner: Approximately how many hours a day do you wear your hearing aids?



HA Owner n=496

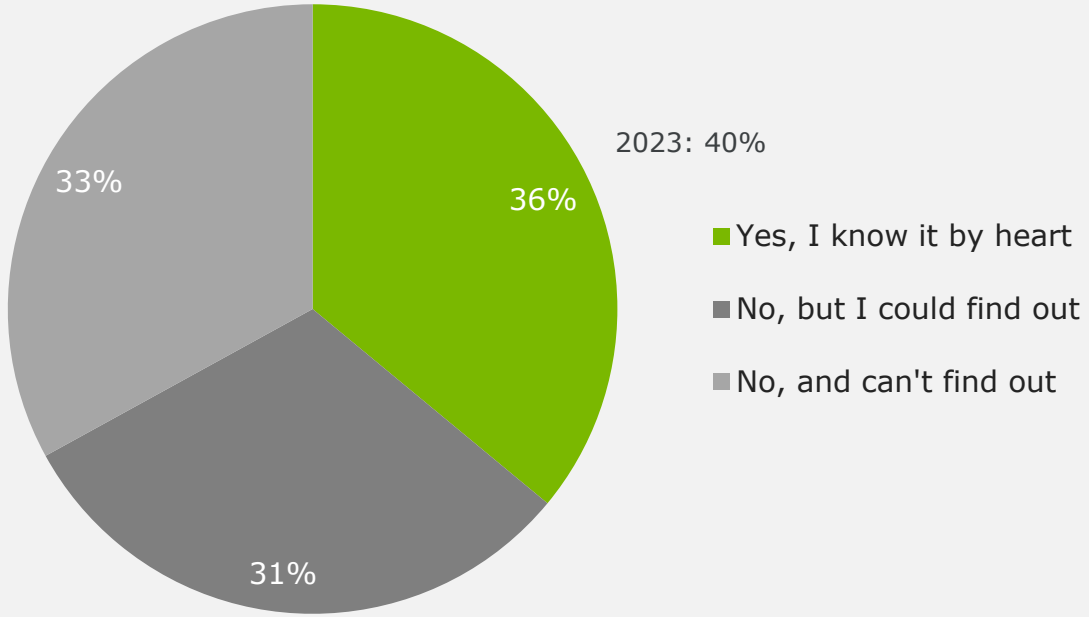
HA worn:
2026 Mean: 7.4 hours/day
2023 Mean: 7.4 hours/day

In the drawer (0 hours):
2026: 7%
2023: 7%

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36% of today’s hearing aid owners are aware of their hearing aid brand

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

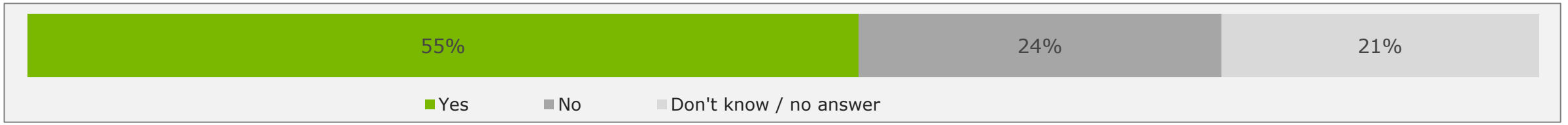


HA Owner n=496

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41% of the HA owners use a hearing aid app, and 76% of them are satisfied with it

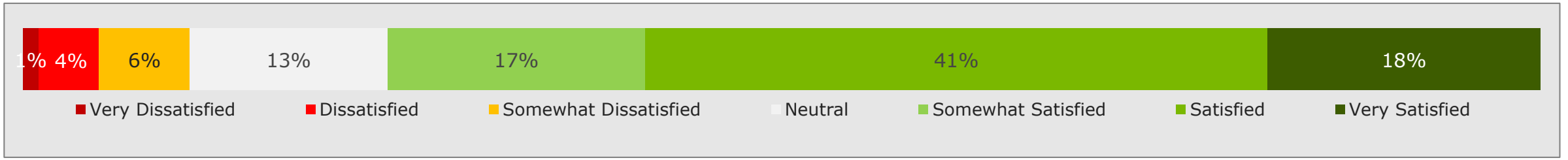
Have you been informed by your hearing care professional about hearing aid apps?
(HA Owner n=496)



Do you personally use apps for your hearing aids?
(HA Owner n=496)



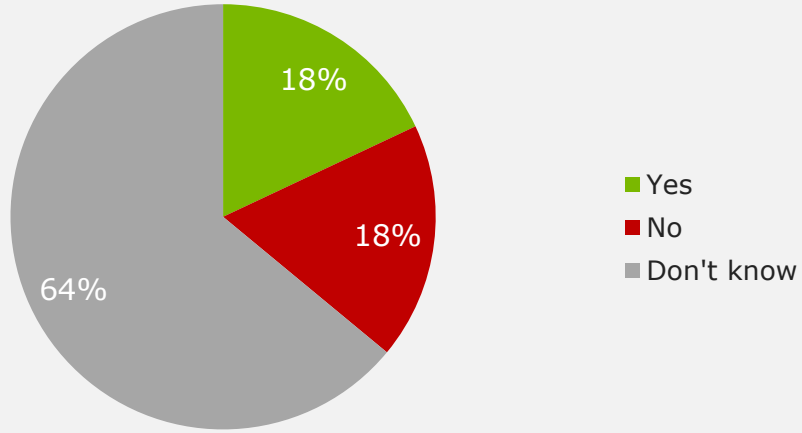
IF APPS USED (n=219):
Overall, how satisfied are you with the performance of your apps?



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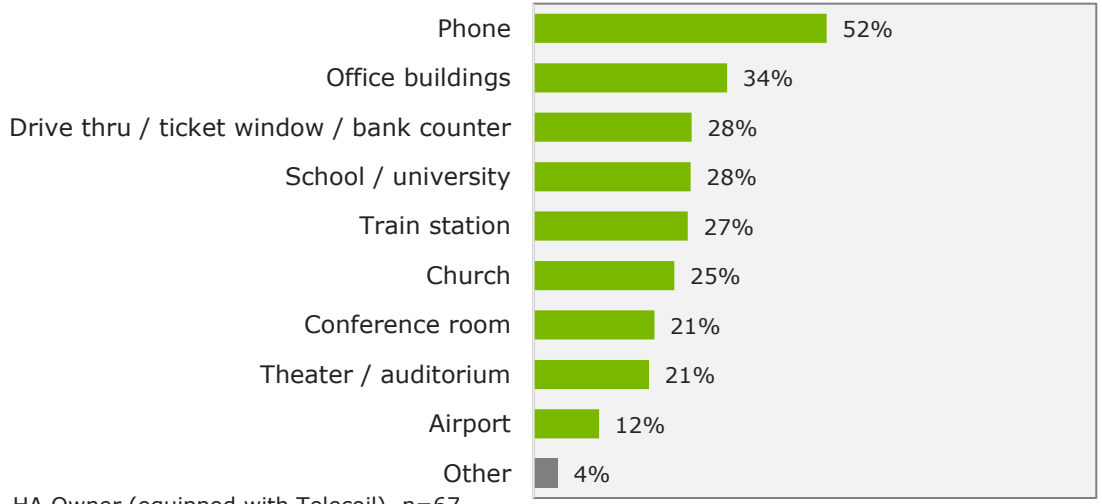
18% of HAs are (to the owners' knowledge) equipped with Telecoil

HA Owner: Are your hearing aids equipped with Telecoil?



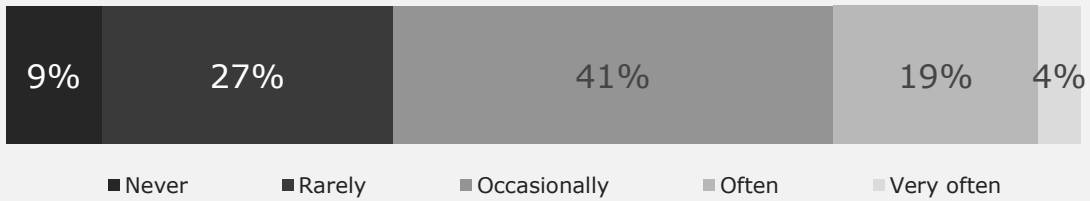
HA Owner n=496

Where do you use your telecoil to improve your hearing?



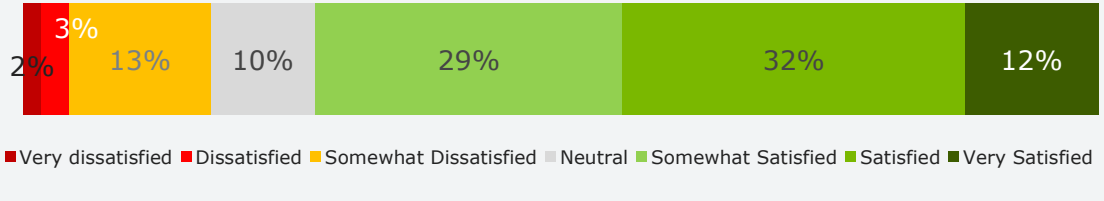
HA Owner (equipped with Telecoil), n=67

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



HA Owner (equipped with Telecoil), n=67

How satisfied are you with the telecoil option?

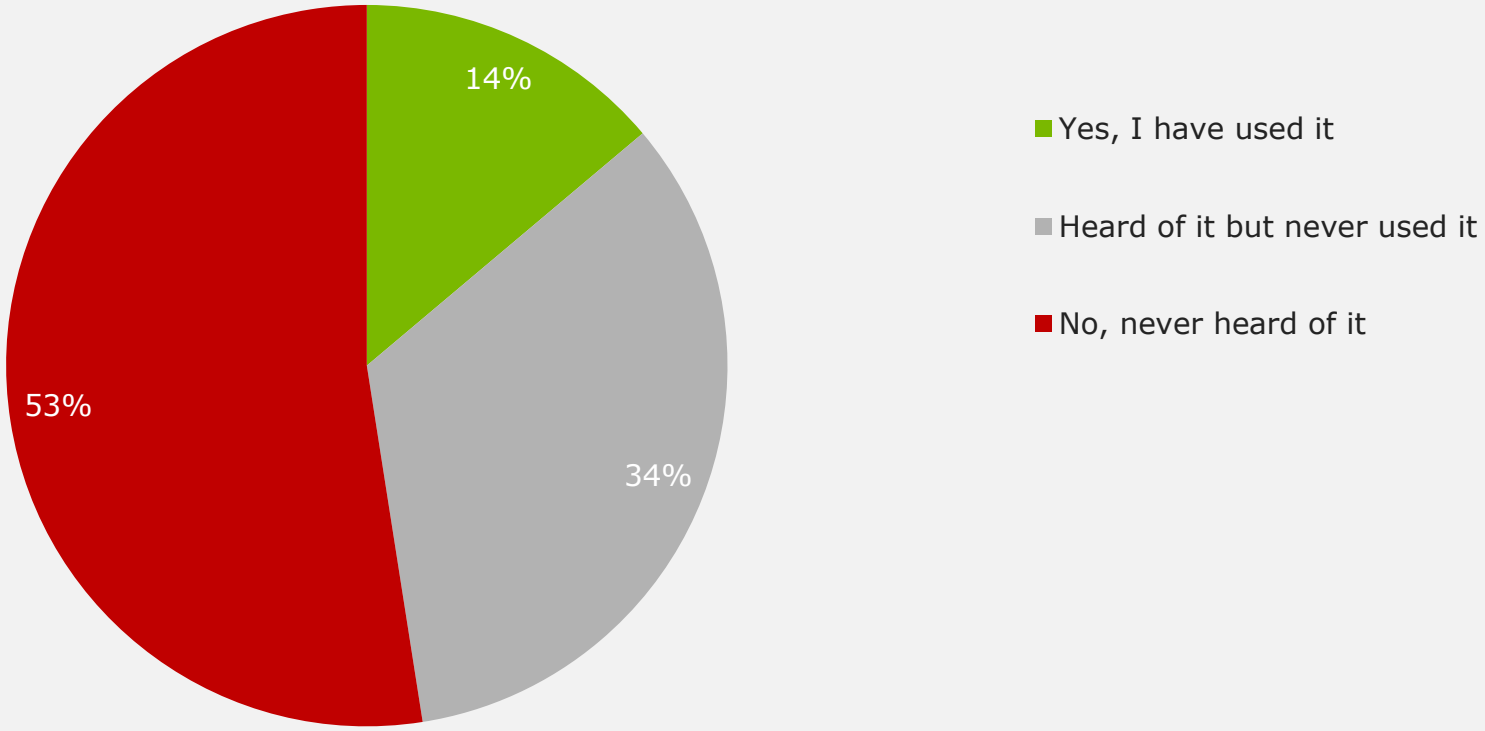


HA Owner (use Telecoil), n=58

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14% of the HA owners have already used remote fitting, 34% have at least heard of it, and 53% have never heard of it

HA Owner: 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=496

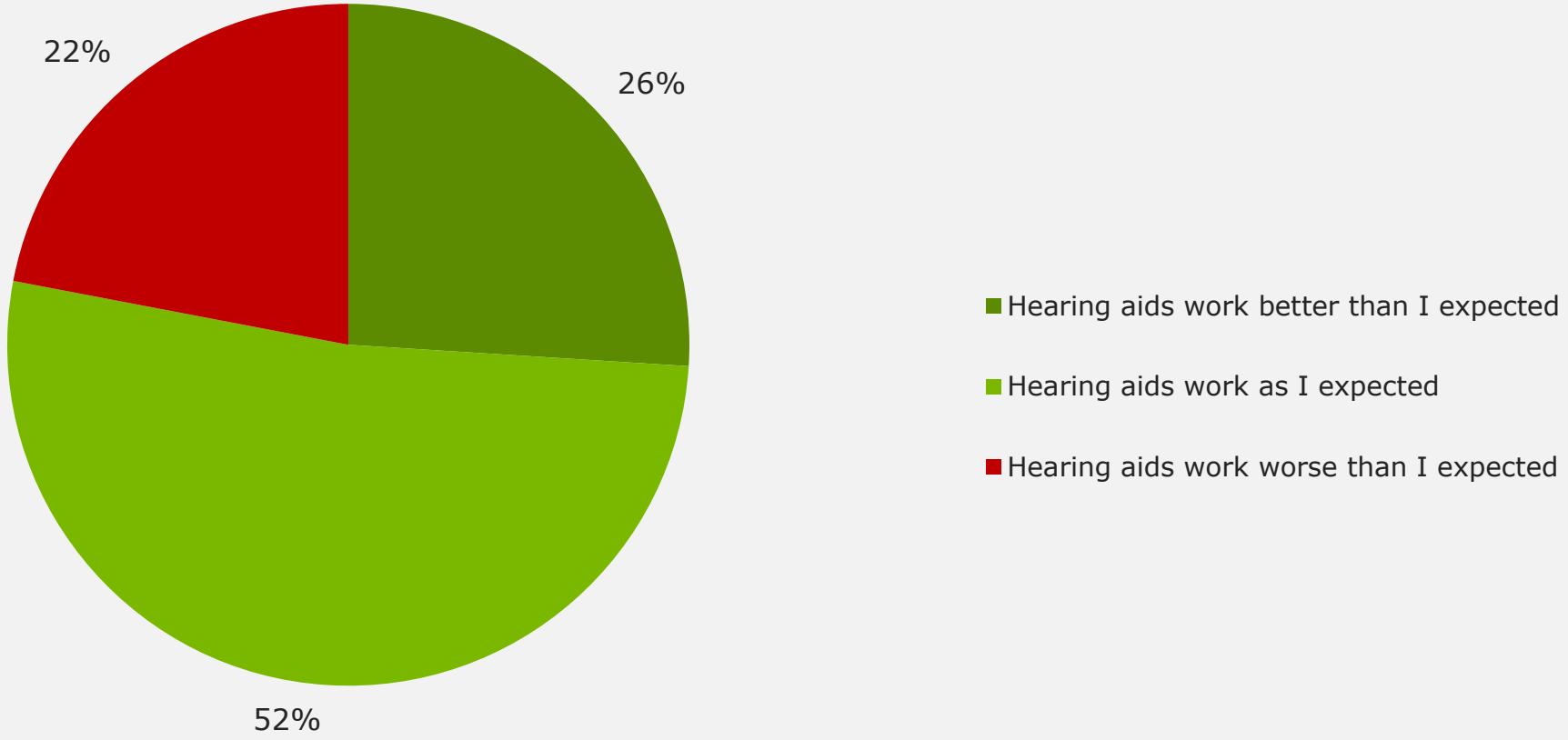
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Satisfaction with hearing aids and drivers, Importance of listening situations

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78% of hearing aid owners say their hearing aid works better than or as expected

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

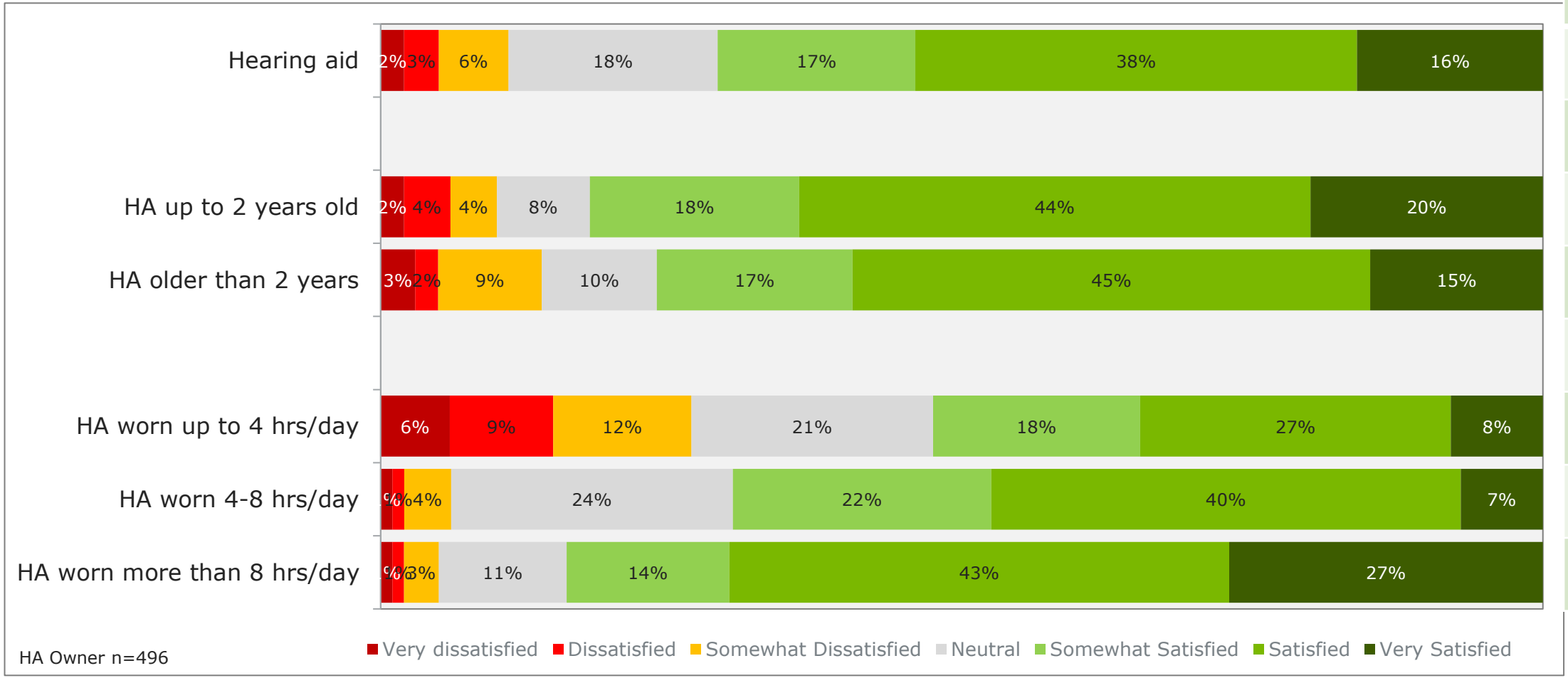


HA Owner n=496

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Overall satisfaction with HA: 71% of hearing aid owners are satisfied with their hearing aid(s)

HA Owner: Overall, how satisfied are you with your hearing aid(s)?



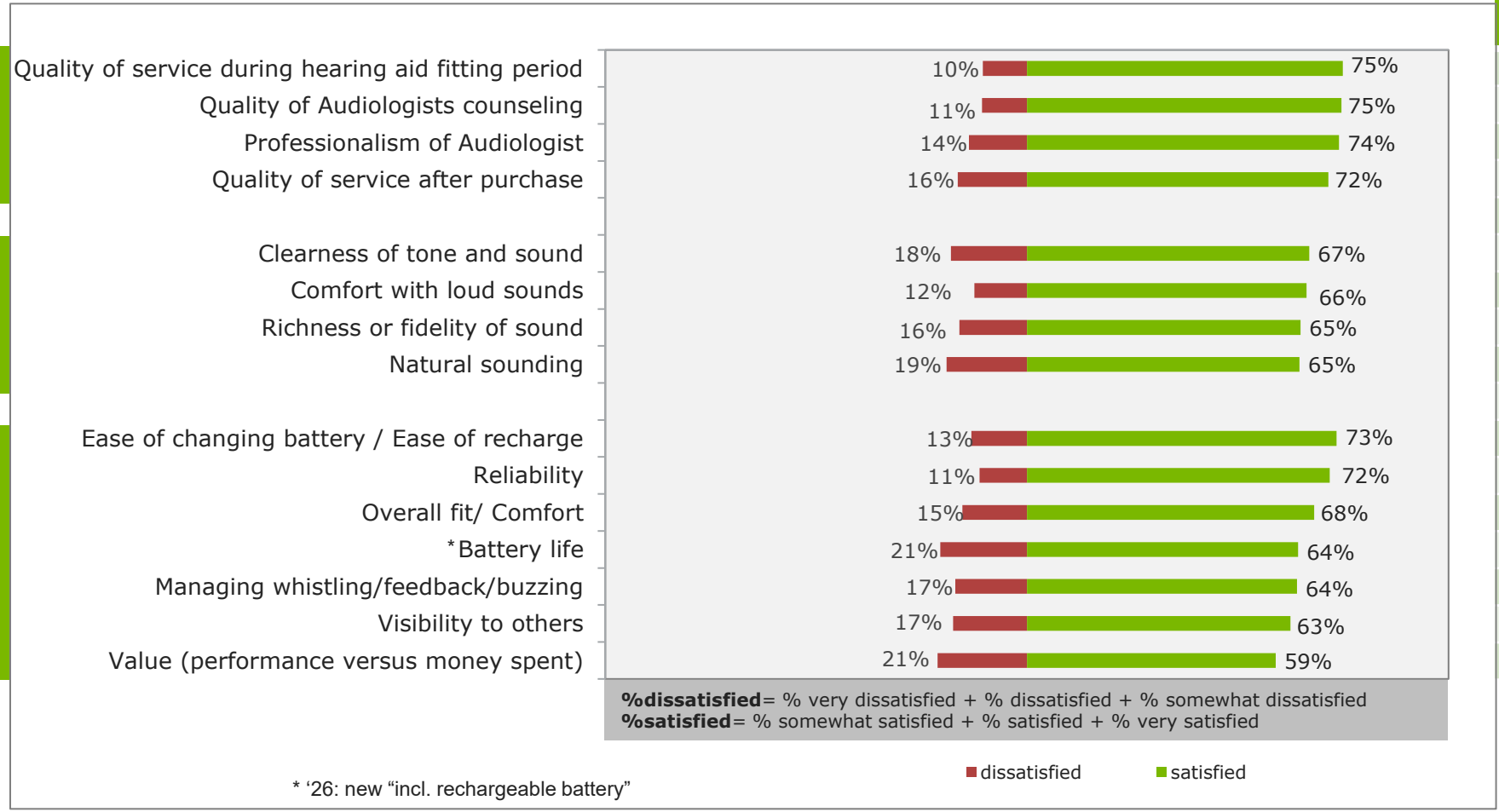
	2026	2023
	% satisfied	
Hearing aid	71%	76%
HA up to 2 years old	82%	87%
HA older than 2 years	77%	74%
HA worn up to 4 hrs/day	53%	57%
HA worn 4-8 hrs/day	70%	78%
HA worn more than 8 hrs/day	84%	88%

HA Owner n=496

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Satisfaction with current hearing aids

HA Owner: Please indicate how satisfied you are with your current hearing aid(s) in terms of...



Trend % satisfied compared to 2023
-4%
-5%
-8%
-9%
-8%
-4%
-7%
-11%
-9%
-4%
-7%
-4%
-5%
-11%
-3%

HA Owner n=496

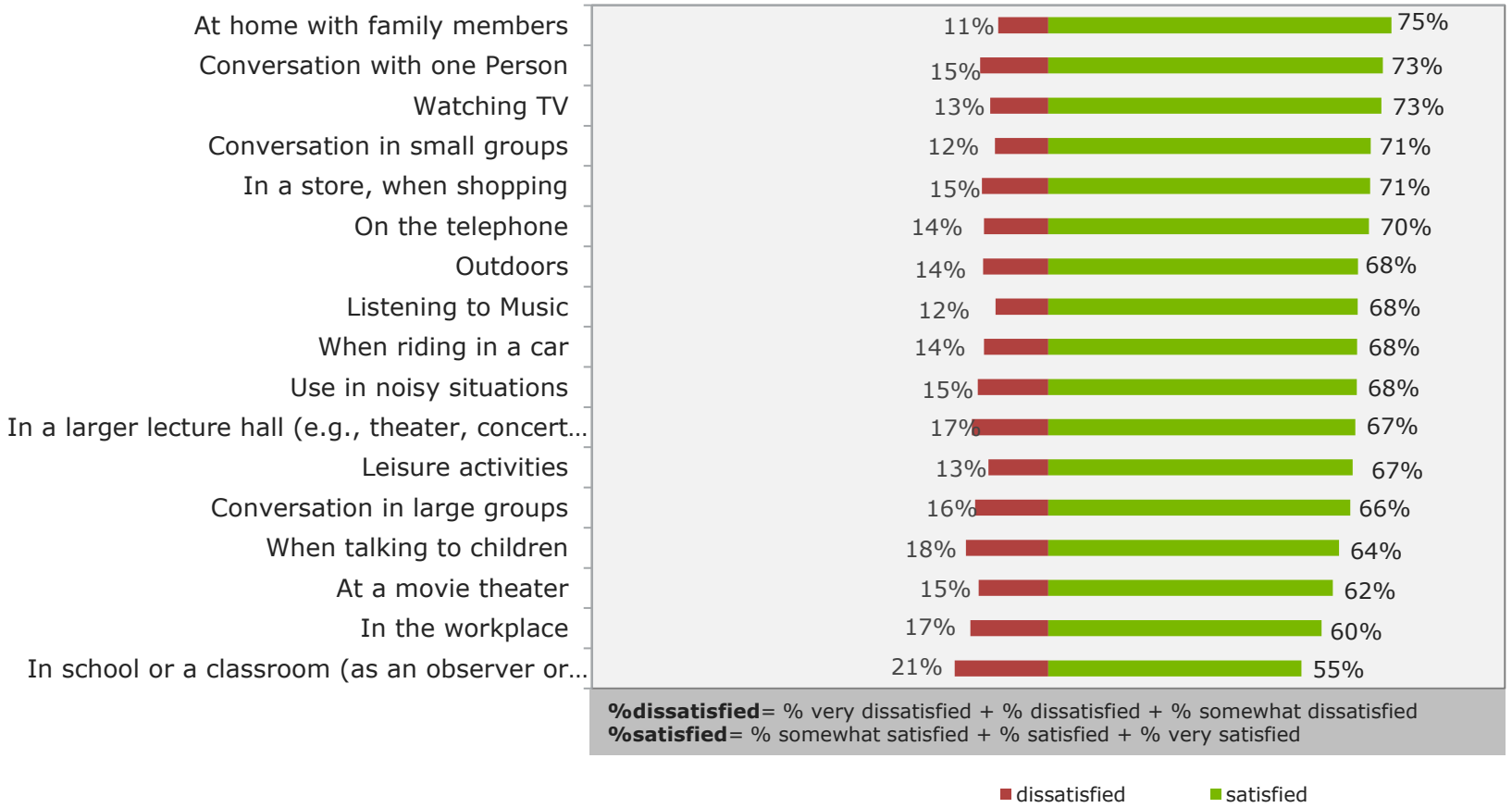
* '26: new "incl. rechargeable battery"

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Satisfaction with current hearing aids

HA Owner: Please indicate how satisfied you are with your current hearing aid(s) in terms of...

Listening situations



Trend % satisfied compared to 2023
-5%
-10%
-7%
-7%
-7%
-7%
-11%
-6%
-9%
-2%
-6%
-7%
-5%
-13%
-14%
-12%
-14%

HA Owner n=496

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Sound quality, overall fit and professional service are the strongest drivers of hearing aid satisfaction

		Influence on overall satisfaction with HA*
HA dispenser / Audiologist	Quality of service after purchase	0.68
	Quality of service during hearing aid fitting period	0.68
	Professionalism of Hearing aid dispenser / Audiologist	0.66
	Quality of Hearing aid dispenser's / Audiologist's counseling	0.65
Sound quality signal processing	Natural sounding	0.74
	Clearness of tone and sound	0.74
	Richness or fidelity of sound	0.71
	Comfort with loud sounds	0.59
Product features	Overall fit/ Comfort	0.68
	Reliability	0.62
	Ease of changing battery / Ease of recharge	0.61
	Value (performance versus money spent)	0.61
	Battery life	0.58
	Managing whistling/feedback/buzzing	0.56
	Visibility to others	0.52

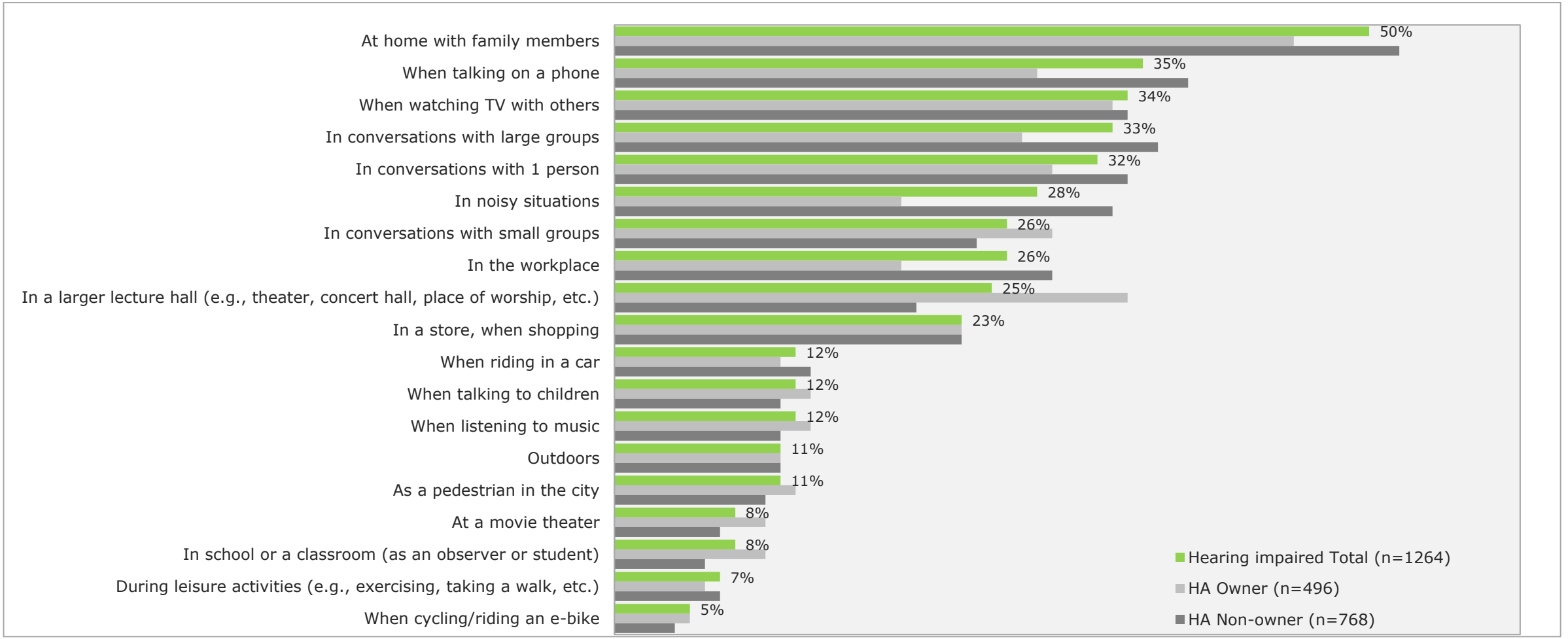
HA Owner n=496

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

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For hearing aid owners, hearing well is most important at home with family members, when watching TV and in larger venues

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



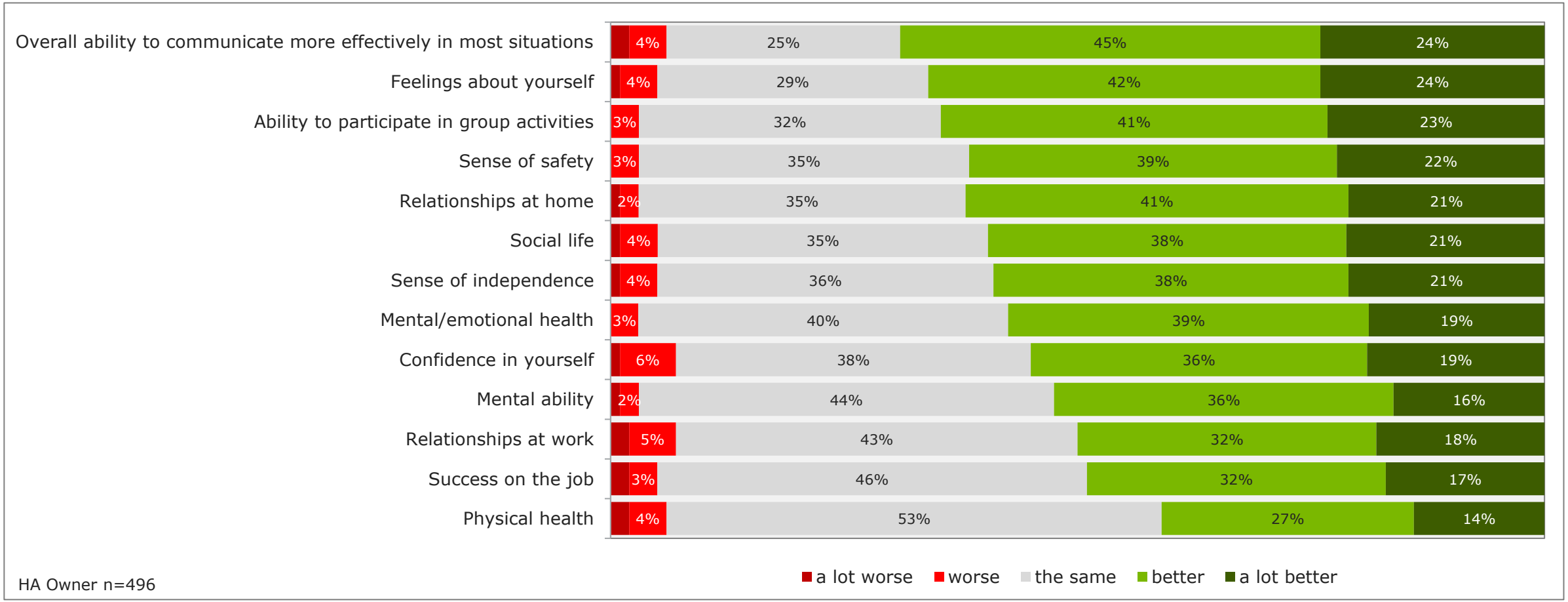
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Positive impact of hearing aids, safety due to hearing aids, quality of life

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Communication ability, self-esteem and participation in group activities are among the areas most impacted by hearing aids

HA Owner: 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).

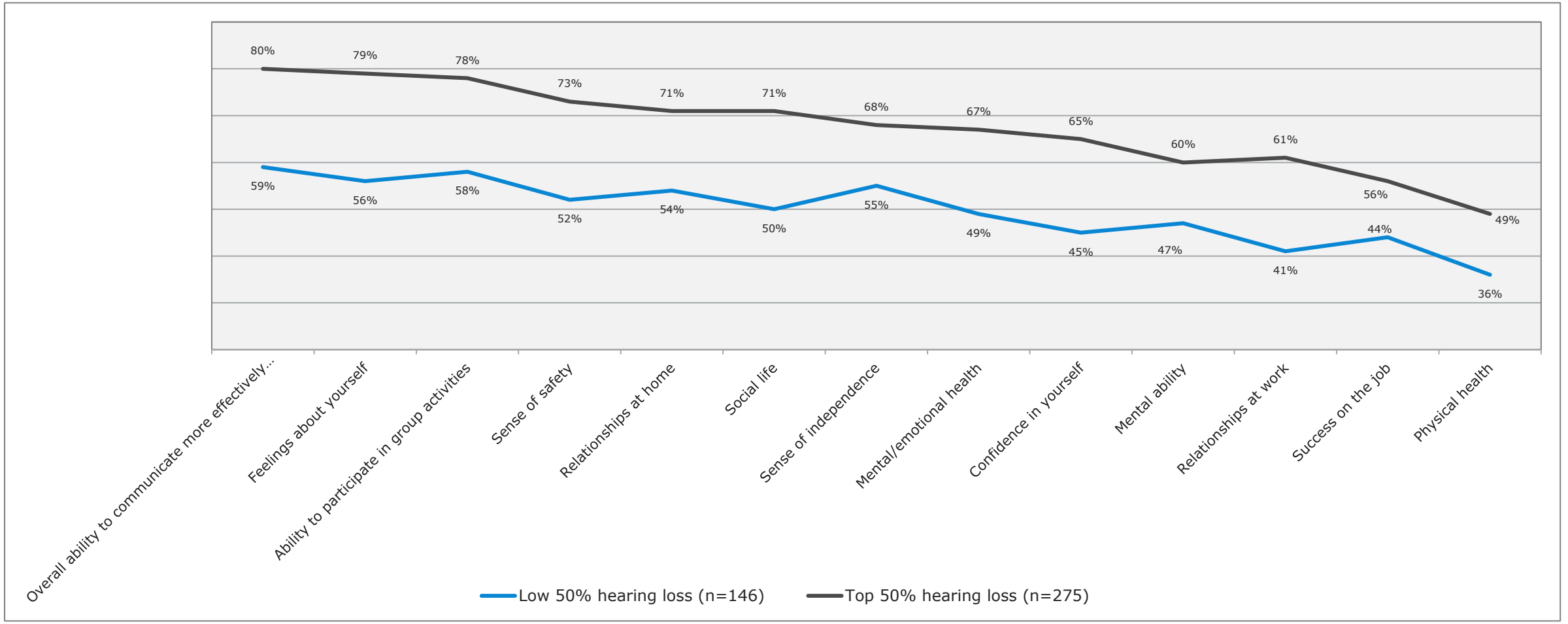


HA Owner n=496

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

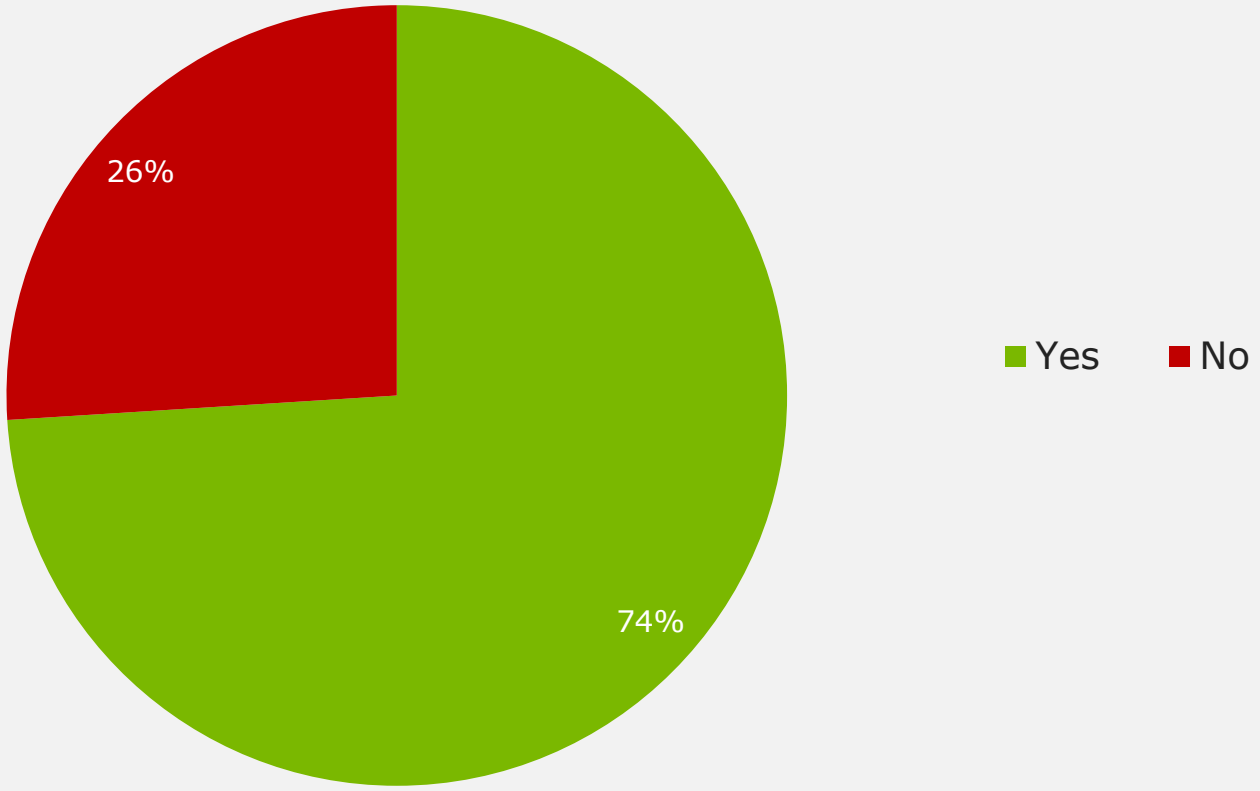
% of HA Owners feeling better/a lot better



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74% of hearing aid owners feel more confident moving in a city since wearing hearing aids

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

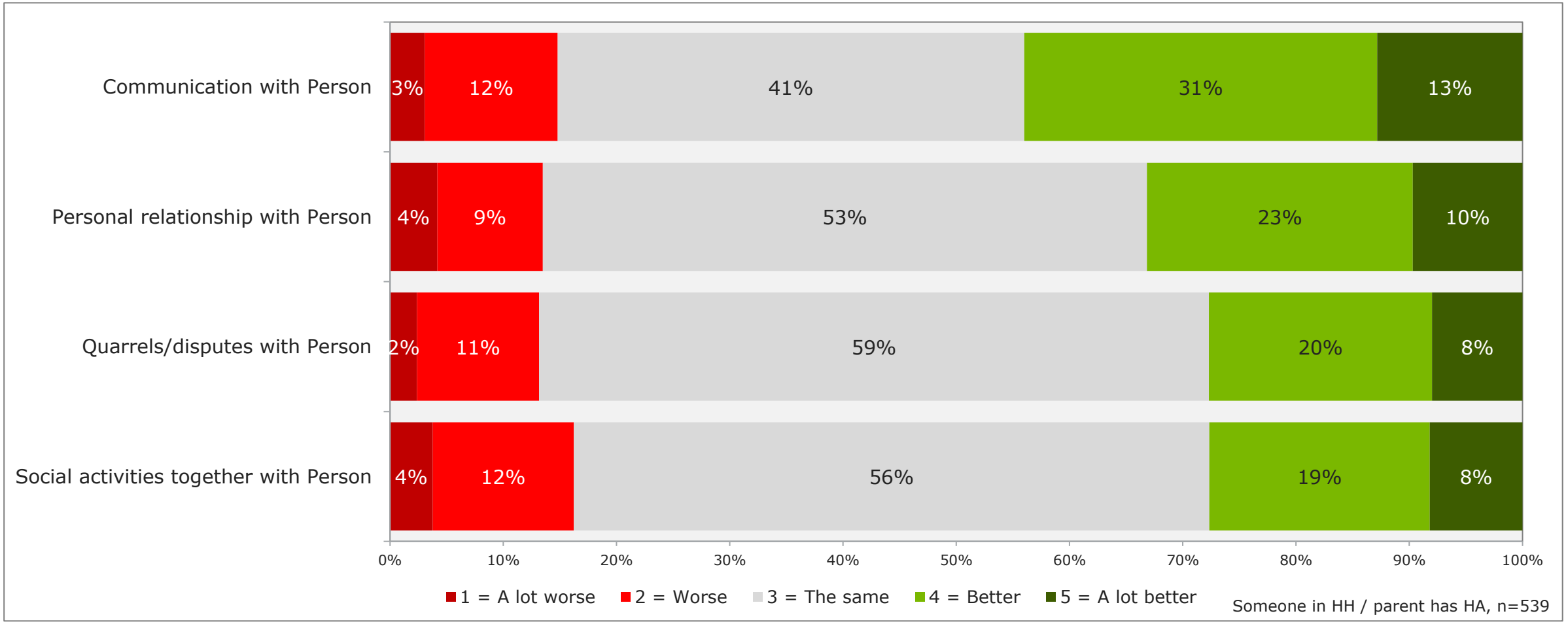


HA Owner n=496

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

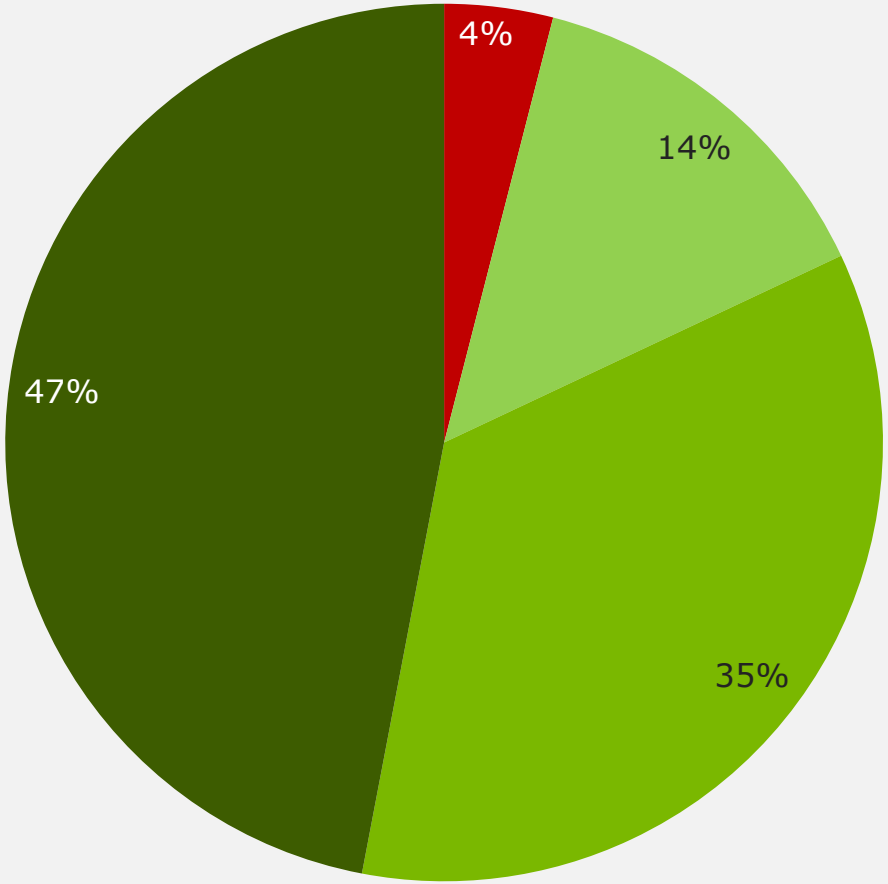
How did the following aspects change since person X is wearing hearing aids?



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96% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

HA Owner: How often do your hearing aids improve your quality of life?



HA Owner n=496

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4. Analysis of hearing impaired non-owners

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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=496	HA Non-owner low 50% HL n=352	HA Non-owner Top 50% HL n=249
Ears impaired (stated)			
Unilateral loss	31%	39%	35%
Bilateral loss	69%	61%	65%
Perceived loss (one direct qn)			
Mild	15%	59%	18%
Moderate	41%	33%	48%
Severe	37%	6%	29%
Profound	8%	2%	5%

More similar hearing loss-structure

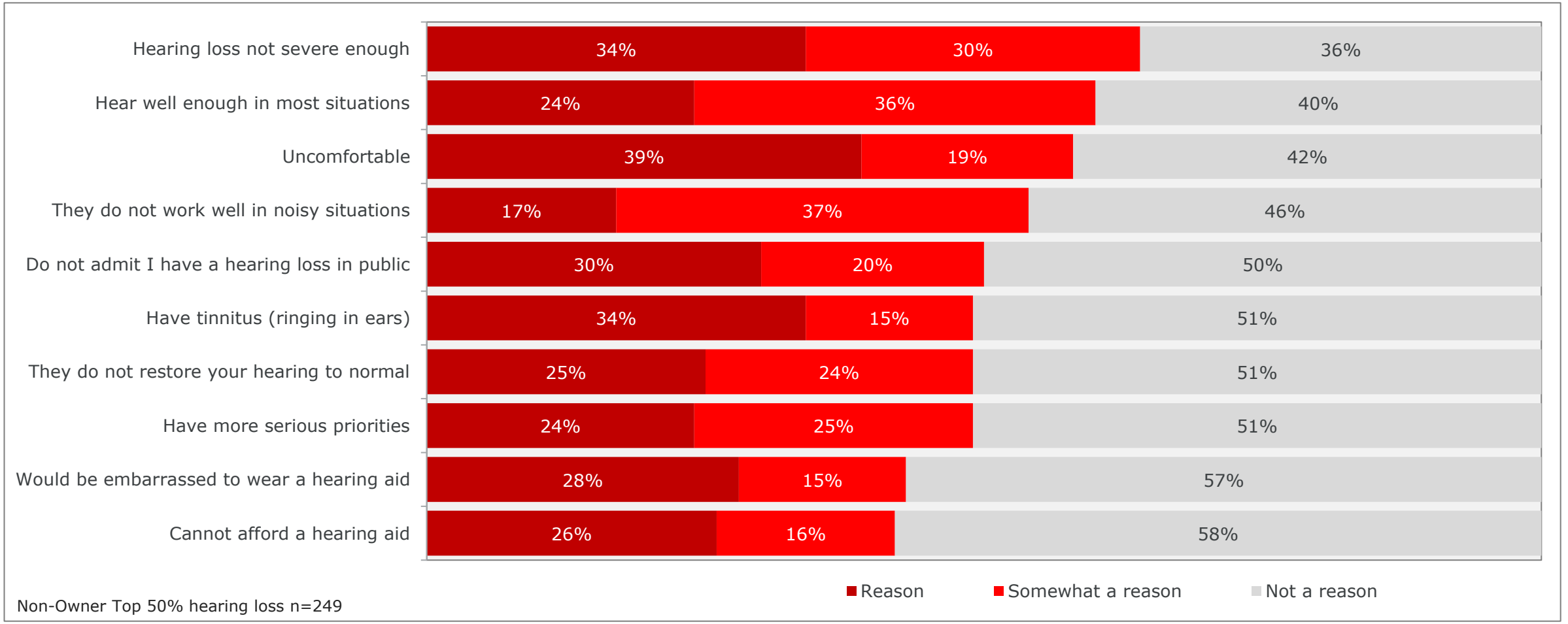
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Reasons for not having hearing aids

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Top 10 reasons for not having a hearing aid

HA Non-owner Top 50% hearing loss:

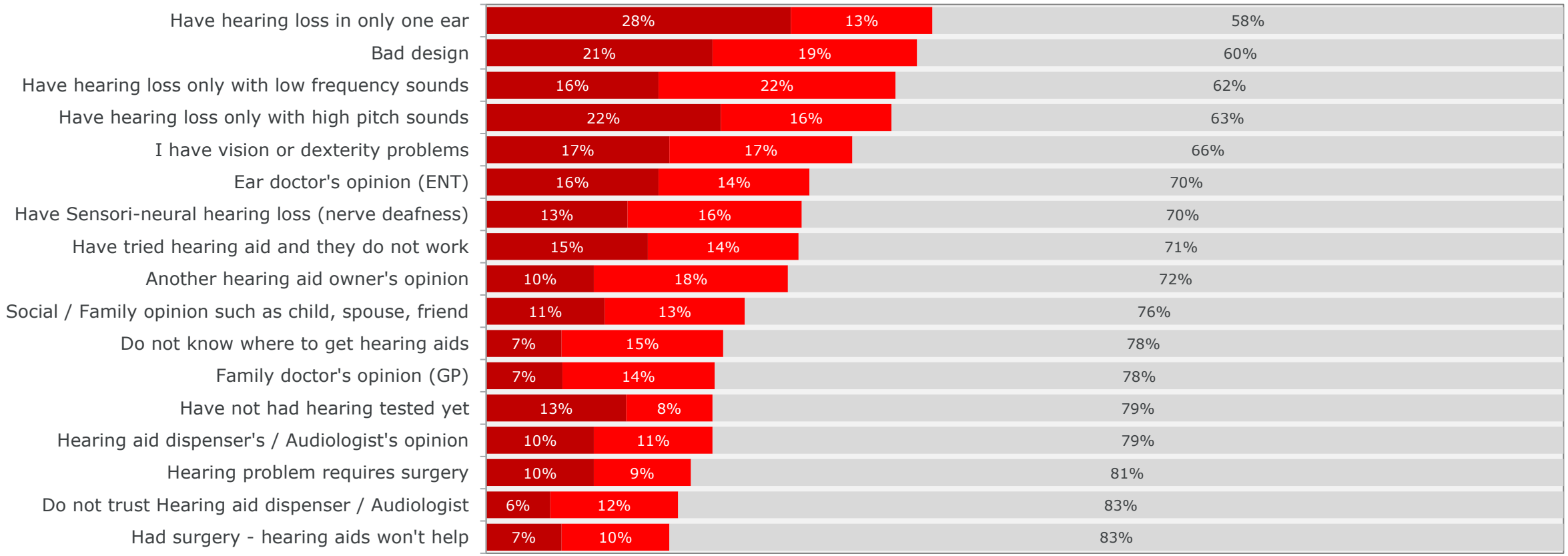


Non-Owner Top 50% hearing loss n=249

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Less important reasons for not having a hearing aid

HA Non-owner Top 50% hearing loss:

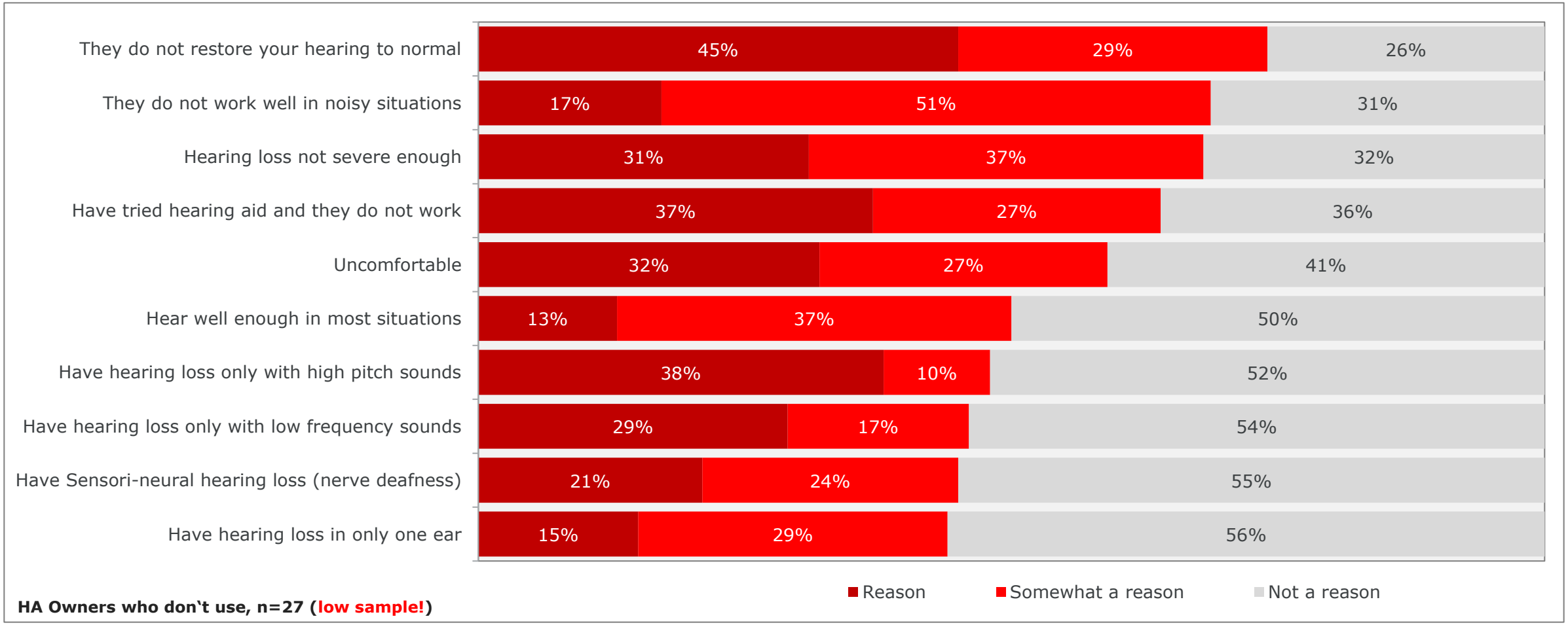


Non-Owner Top 50% hearing loss n=249

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Top 10 reasons for HA owners who don’t use them

HA Owner who don’t use it



HA Owners who don‘t use, n=27 (low sample!)

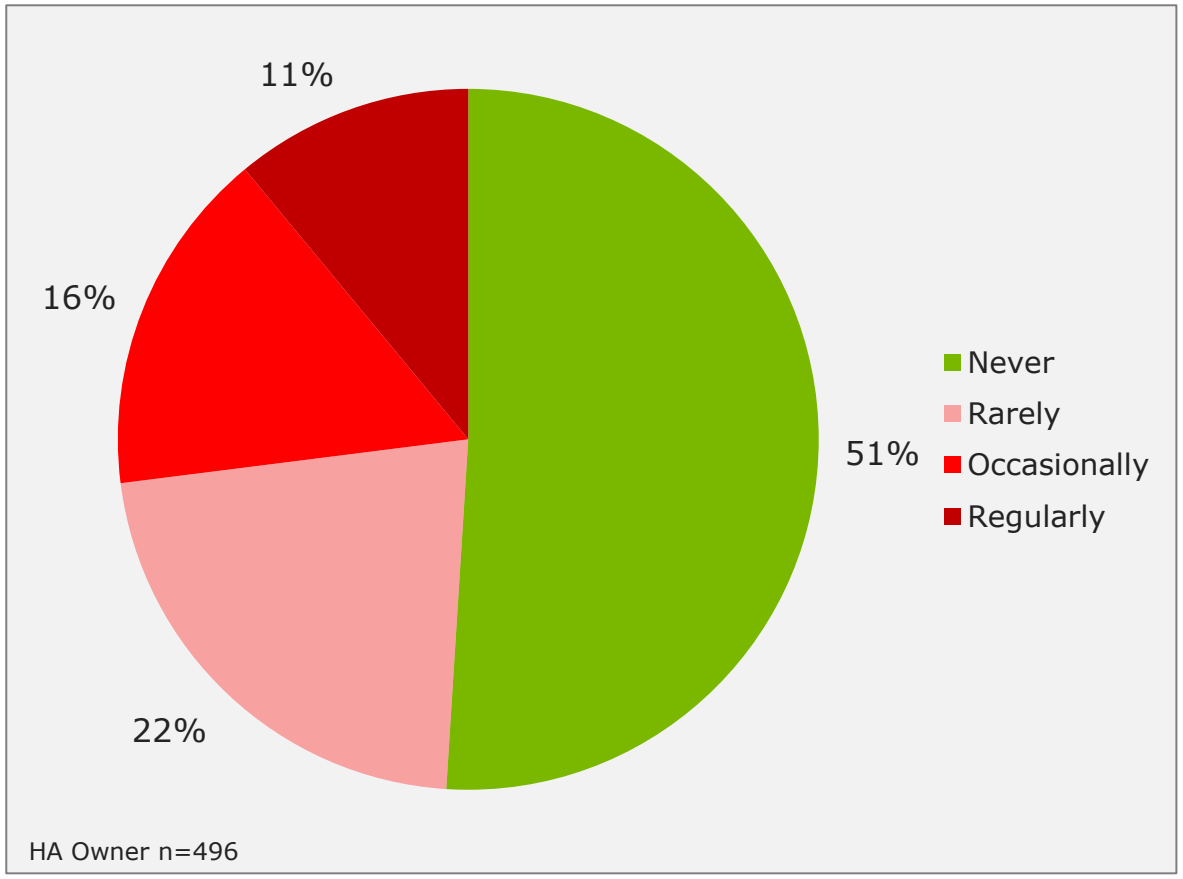
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Social rejection because of hearing loss compared to the acceptance of hearing aids

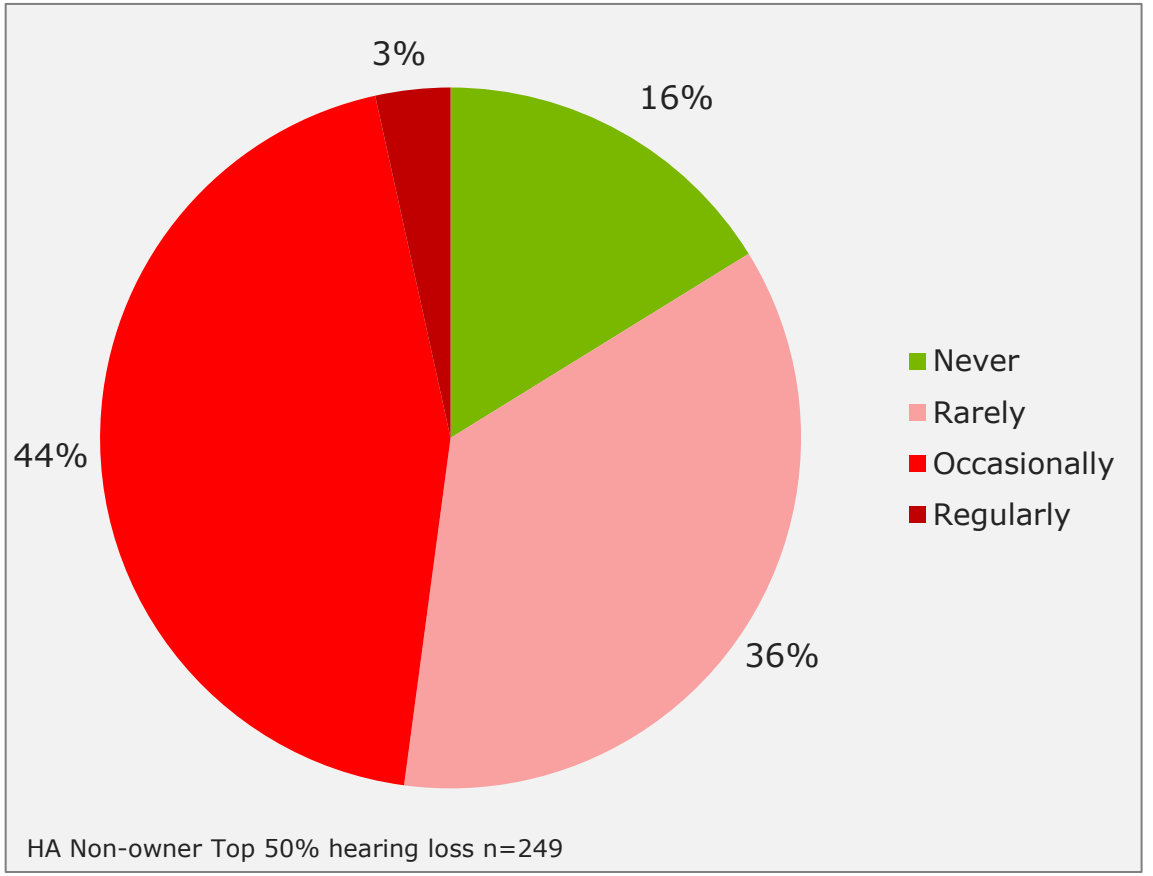
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51% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is much more likely that somebody makes fun of or rejects a hearing impaired without a hearing aid

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?



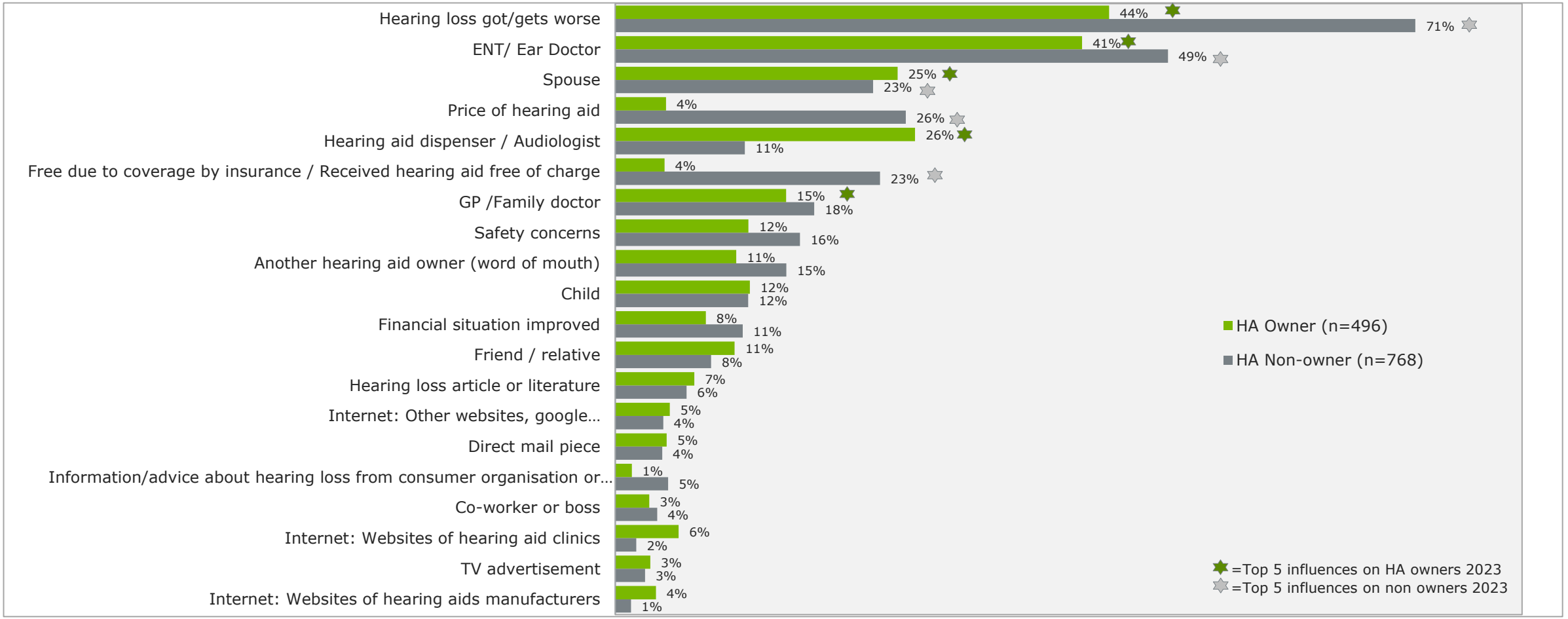
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Most important triggers to buy

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The key drivers for getting hearing aids are worsening hearing, ENT specialists and spouses; hearing care professionals are particularly important among owners, while price and insurance coverage matter more among non-owners

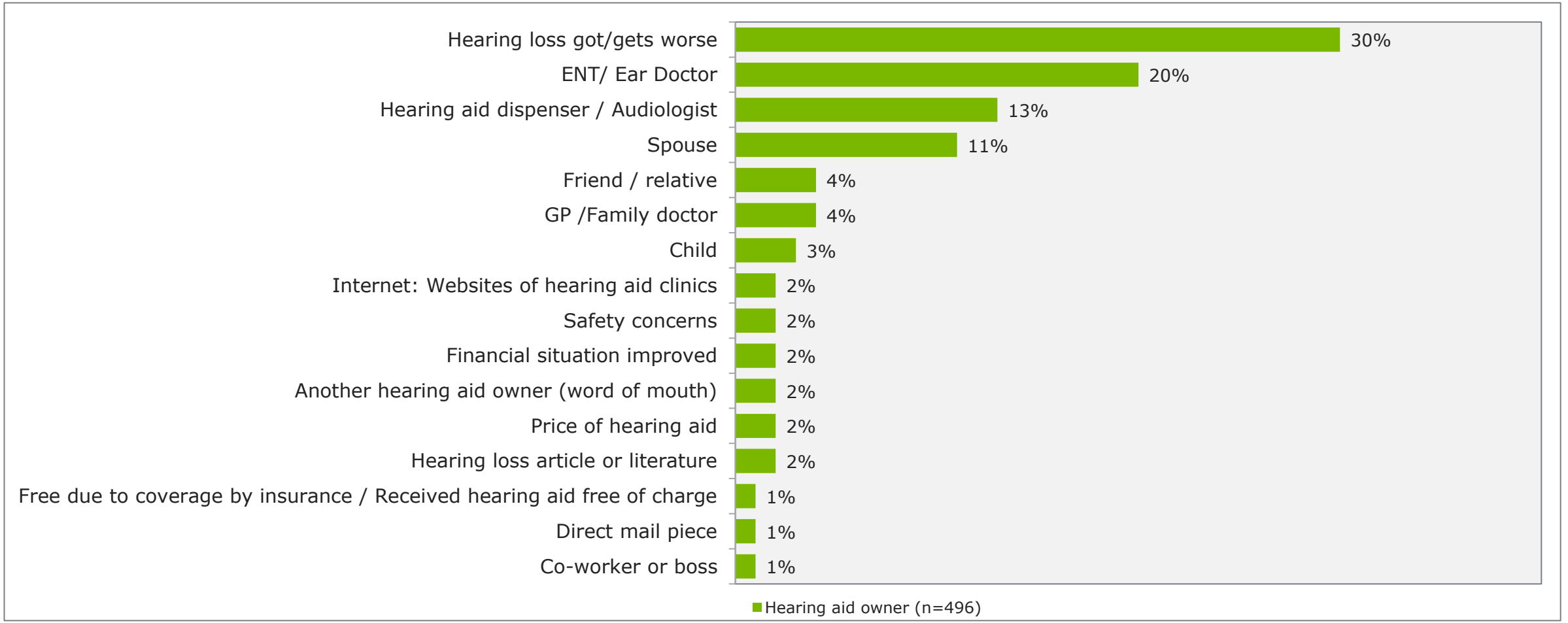
HA Owner: Thinking back to when you obtained your first hearing aid(s), what influenced you to obtain /purchase the hearing aid(s)?
HA Non-owner: What do you think would influence you to obtain / purchase a hearing aid?



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The most important reasons for buying a hearing aid are worsening hearing loss and advice from doctors, audiologists and spouses

HA Owner: 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	7’120	13.2%	34.0%	47.5%	50.8%	48.4%
Female	7’772	12.1%	36.1%	52.5%	49.2%	51.6%
Age						
1 - 14	2’064	4.1%	47.5%	15.2%	3.7%	6.1%
15 - 24	1’510	7.4%	45.4%	10.7%	5.0%	7.7%
25 - 34	1’716	8.3%	38.4%	12.1%	7.2%	8.3%
35 - 44	2’422	9.5%	40.0%	16.8%	11.3%	13.9%
45 - 54	2’338	10.0%	24.0%	16.2%	14.6%	8.5%
55 - 64	1’740	13.7%	22.1%	11.5%	15.2%	8.0%
65 - 74	1’827	20.7%	30.9%	11.1%	21.4%	17.7%
75+	1’276	35.9%	42.6%	6.3%	21.6%	29.7%
Type of household						
Single household	1’483	20.0%	44.6%	9.1%	13.5%	20.1%
Couple, no kids	3’232	15.4%	30.3%	21.0%	28.6%	22.9%
Couple with kid(s)	7’068	8.8%	34.8%	49.5%	33.3%	33.0%
Single mom/dad with kid(s)	873	14.4%	38.7%	5.7%	6.3%	7.4%
Retirement home, hospital etc.	93	21.3%	56.9%	0.6%	0.7%	1.7%
Other	2’143	14.6%	31.3%	14.1%	17.6%	14.9%

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* Small sample sizes in some categories

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)	7’872	15.5%	35.6%	51.1%	64.5%	65.9%
The spouse of the head of the household	2’358	14.3%	34.1%	15.5%	18.2%	17.5%
Daughter/son of head of household	3’717	3.6%	34.7%	27.5%	7.1%	7.0%
Other	946	19.9%	33.9%	5.8%	10.2%	9.7%
Employment						
Full time employed	6’710	10.8%	33.0%	54.8%	41.4%	38.7%
Part time employed	659	10.1%	35.4%	5.4%	3.7%	3.8%
Unemployed / not working	787	9.1%	25.9%	6.6%	4.5%	3.0%
Retired under a disability pension scheme (fully or partly)	416	18.8%	50.5%	3.1%	3.3%	6.4%
Early retired under an early retirement benefit scheme	145	18.5%	30.9%	1.1%	1.6%	1.3%
Retired (at the official retirement age)	2’980	26.4%	35.6%	20.1%	43.3%	45.4%
Student / pupil / in training	1’010	3.4%	24.3%	8.9%	2.2%	1.3%
Education						
Niepełne podstawowe	64	30.3%	46.3%	0.4%	0.9%	1.4%
Podstawowe	586	21.5%	33.6%	4.2%	7.1%	6.8%
Gimnazjalne	179	15.3%	50.0%	1.4%	1.2%	2.2%
Zasadnicze zawodowe	1’675	20.3%	34.7%	12.2%	18.9%	19.0%
Średnie ogólnokształcące	1’669	12.5%	43.8%	13.4%	10.0%	14.8%
Średnie zawodowe	2’250	17.1%	35.3%	17.1%	21.3%	22.0%
Policealne	774	16.6%	41.1%	5.9%	6.5%	8.5%
Wyższe	5’269	10.1%	27.8%	43.4%	32.8%	24.0%
Other	249	8.6%	32.5%	2.1%	1.2%	1.1%

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* Small sample sizes in some categories

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

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