

Results

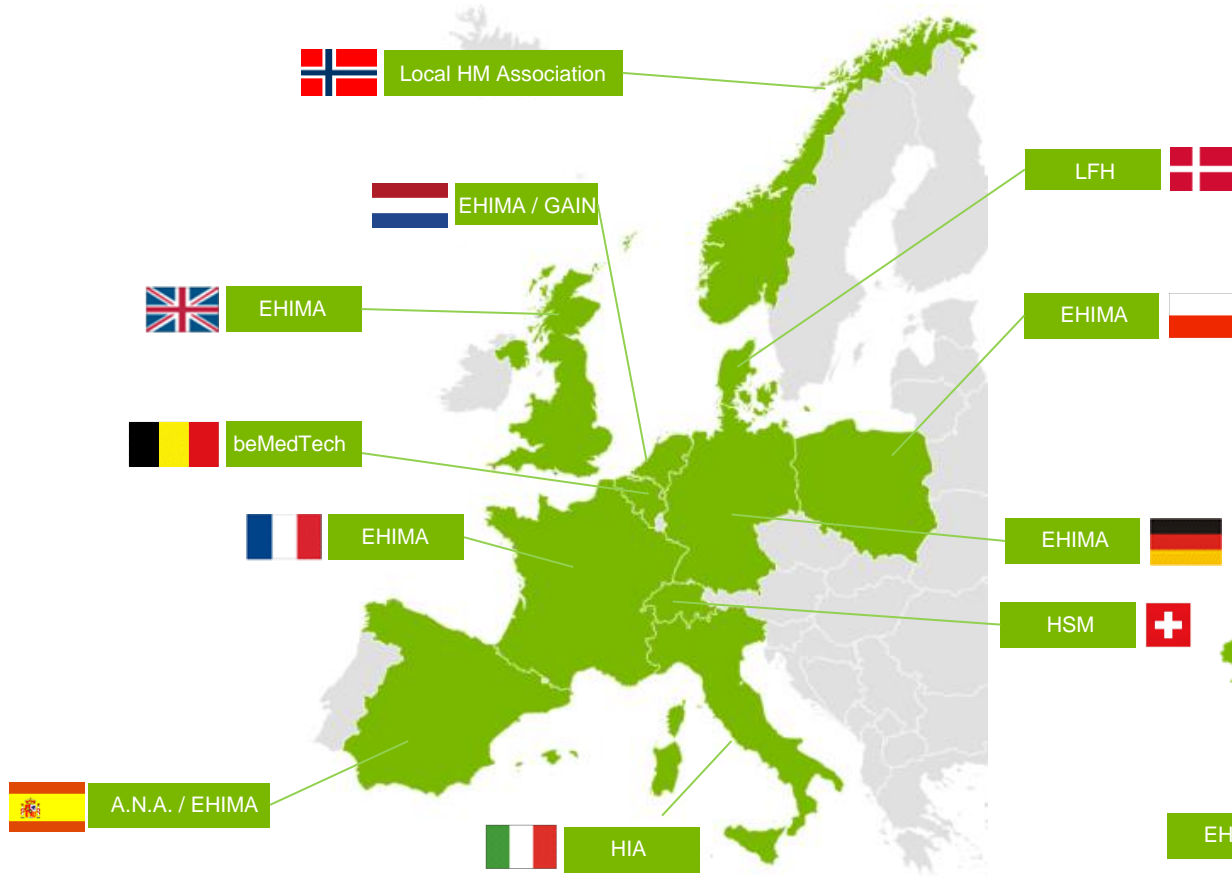
EuroTrak Netherlands 2022

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

Summary

1. Introduction

EuroTrak Netherlands 2022 is part of the EuroTrak / APACTrak studies:



EuroTrak Netherlands 2022 was designed and executed by Anovum (Zurich) on behalf of GAIN and EHIMA.

Sample sizes:

Representative sample (sample 1): n=13'314 people

Hearing impaired (sample 2): n=1'309 people

HA owners: n= 758 people

Hearing impaired non-owners: n= 551 people



Summary

2. Market overview

- Stated hearing loss prevalence
 - Total: 10.3%, 18+: 11.9% (2016: 10.1%, 18+: 11.8%).
 - Hearing Tests: 26% (2016: 27%) had a hearing test in the last 5 years, most tests done by Audiologists, followed by ENTs and family doctors.
- Hearing aid adoption rate (HA penetration)
 - 44.9% of those with self declared HL (2016: 41.1%).
 - 4.6% of total population (2016: 4.2%).
 - 76% of HA owners have binaural treatment (2016: 74%).
- The route to the hearing aid
 - 73% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
 - 53% got hearing aids recommended from the ENT or family doctor (drop out rate=27% / 2016: 31%).
 - 68% of the GP consultations referred to an ENT, 24% to an audiologist (2016: 16%). 10% recommended no action.
 - 46% of ENT consultations referred to an audiologist, 27% recommended no action (2016: 33%).
- Potential social cost-savings due to the use of hearing aids
 - Hearing aids are believed to have a positive impact on the job.
 - Hearing aid owners have a lower risk of being depressed.
 - Quality of sleep seems to improve if hearing impaired use hearing aids.

Summary

3. Analysis of hearing aid owners

- Hearing aid ownership, usage and accessories
 - 58% of the currently owned HAs were bought in 2019 or later.
 - The average age of the currently owned HAs is 3.1 years.
 - The median age of hearing aids before replacement is 5 years.
 - On average, HAs are worn 8.6 hours a day.
 - 34% of today's hearing aid owners are aware of their hearing aid brand.
 - 44% of the HA owners use an accessory/app for their hearing aids, 66% of those are satisfied with it.
 - 8% of the HA owners have already used remote fitting, but also more than half of them have never heard of it.
- Importance of listening situations and satisfaction with HAs
 - 82% of the hearing aid owners say their hearing aid works better than or as expected
 - 76% of the HA owners are satisfied with their HAs (2016: 73%).
 - The more hours worn per day, the higher the satisfaction with the HA.
 - Satisfaction with newer hearing aids is higher than with older hearing aids.
 - Talking at home with family members, talking on a phone, conversations (small/large groups, 1 person) and noisy situations are the most important listening situations.
- Positive impact of HAs
 - Significant positive impact of HAs on different aspects: Especially Communication effectiveness, ability to participate in group activities and social life improve with hearing aids.
 - 95% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.

Summary

4. Analysis of hearing impaired non-owners

- Reasons not to own/use HAs
 - The main reasons for not using hearing aids are the ENTs opinion, they hear well enough in most situations, do not work well in noisy situations, hearing loss not severe enough and they do not restore hearing to normal.
 - 5% who own hearing aids don't use them at all (0 hours); 13% use them less than one hour/day (0-1 hour).
- Social rejection and triggers to buy
 - 72% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid (only 43% say they are never made fun of because of their hearing loss).
 - The most important influencing factors for getting hearing aids are worsening hearing loss, ENT, audiologist, spouse and GP (+price, insurance coverage for the non owners).

Detailed Results: Roadmap

1. Introduction

- Organisation of EuroTrak Netherlands 2022
- Recruitment process: In search of hearing impaired people

2. Market overview

- Prevalence of hearing loss and hearing aid adoption rate
- Hearing tests and where hearing is tested
- The route to the hearing aid: Sources of information and drop-out rates
- Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities

3. Analysis of hearing aid owners

- Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
- Reasons for getting hearing aids sooner
- Channels for getting hearing aids, recommendation of channel (NPS)
- Awareness and usage of accessories
- Satisfaction with hearing aids and drivers
- Importance of listening situations
- Positive impact of hearing aids, safety due to hearing aids, quality of life

4. Analysis of hearing impaired non-owners

- Reasons for not having hearing aids
- Social rejection because of hearing loss compared to the acceptance of hearing aids
- Most important triggers to buy

5. Appendix

- Demographics: Hearing aid adoption rates and populations

1. Introduction

Organisation of EuroTrak Netherlands 2022

Organisation

- Principal of the project EuroTrak Netherlands 2022 are GAIN and EHIMA.
- Anovum Zurich developed the concept of EuroTrak Netherlands, 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

- GAIN and EHIMA 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 Netherlands/2022/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=13'314** people based on census data.

Step 2: Target population interviews

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

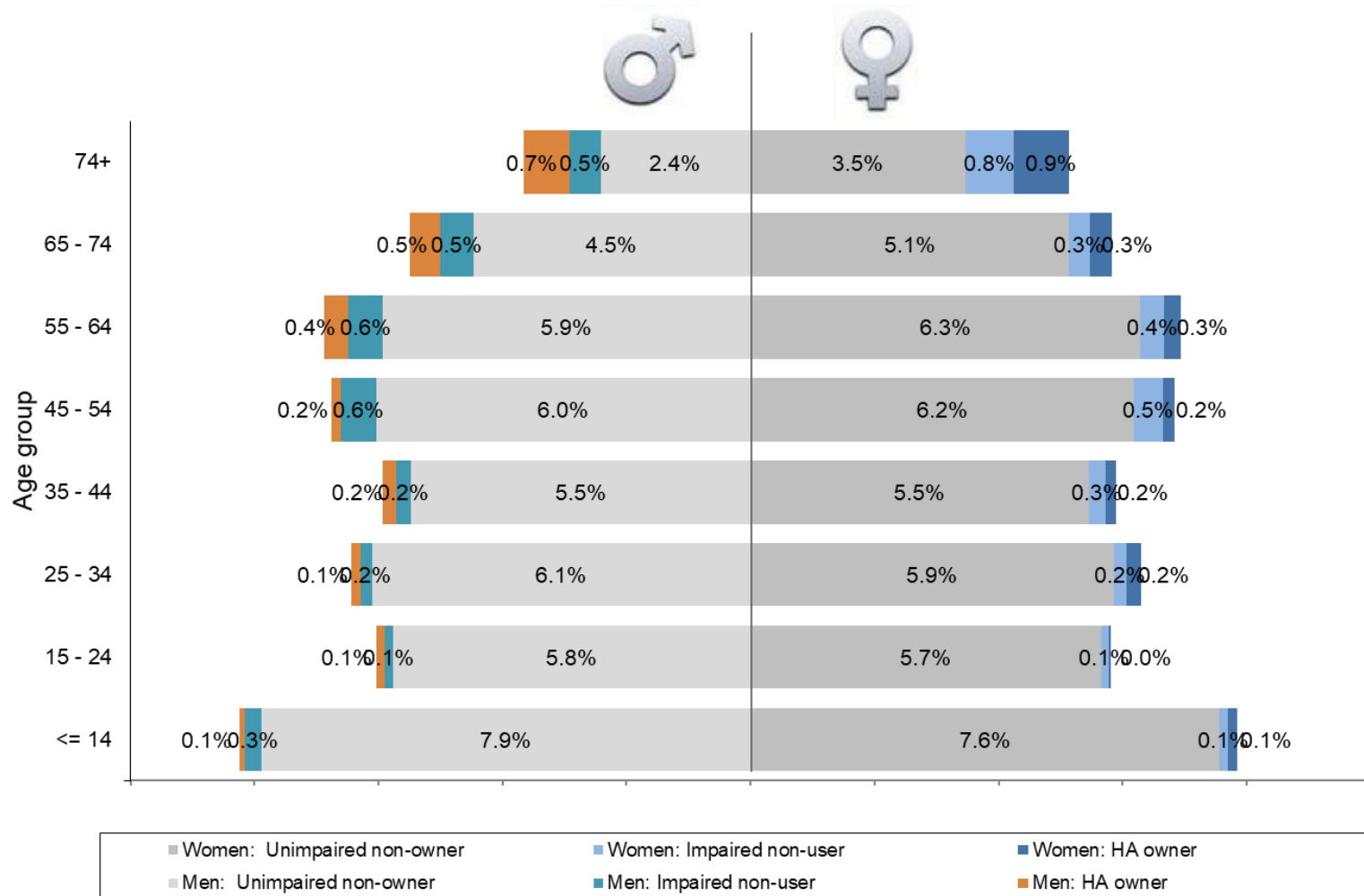
Process:

1. Main questionnaires: Owners and hearing impaired non-owners
2. Balancing through weighting according to representative screening interviews
3. Resulting sample: **n=758** hearing aid owners and **n=551** hearing impaired non-owners

2. Market overview

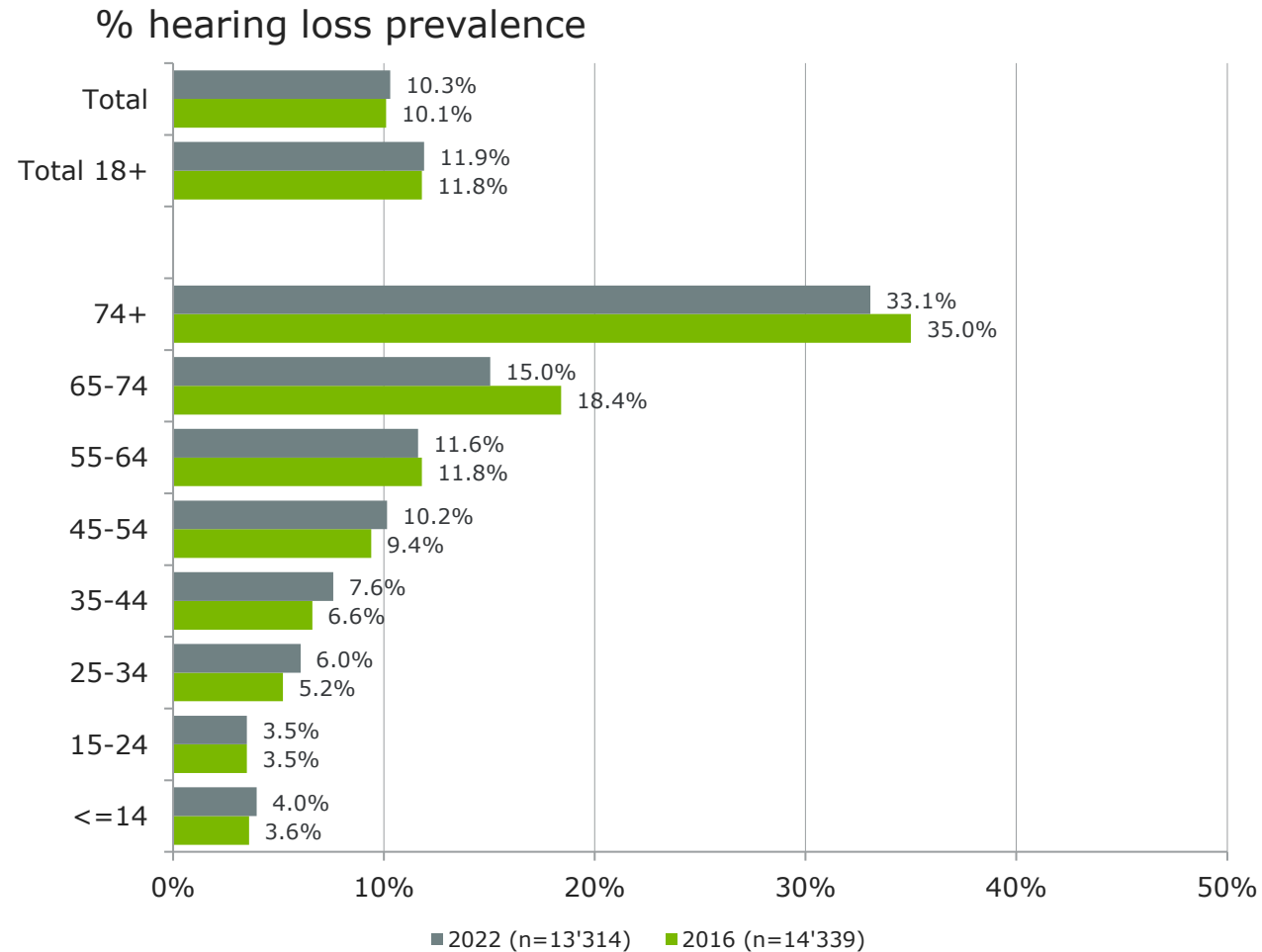
Prevalence of hearing loss and adoption rate

Hearing loss and hearing instrument ownership by gender/age



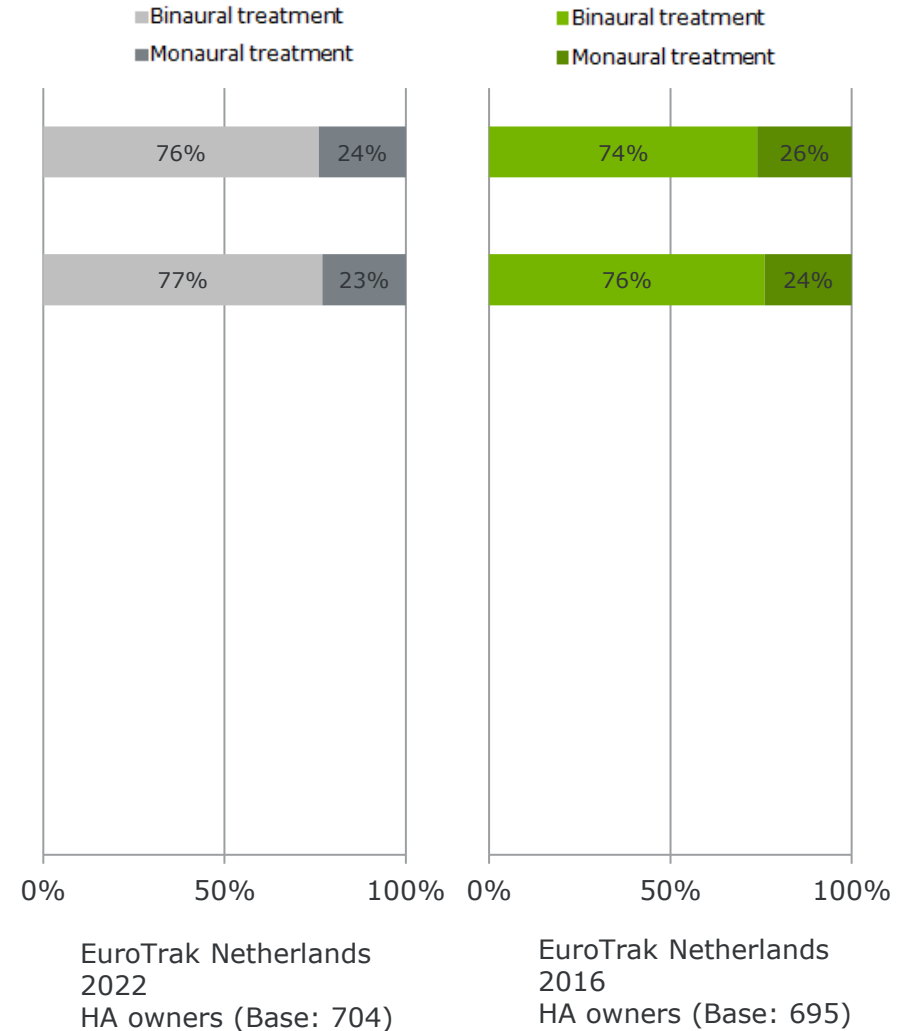
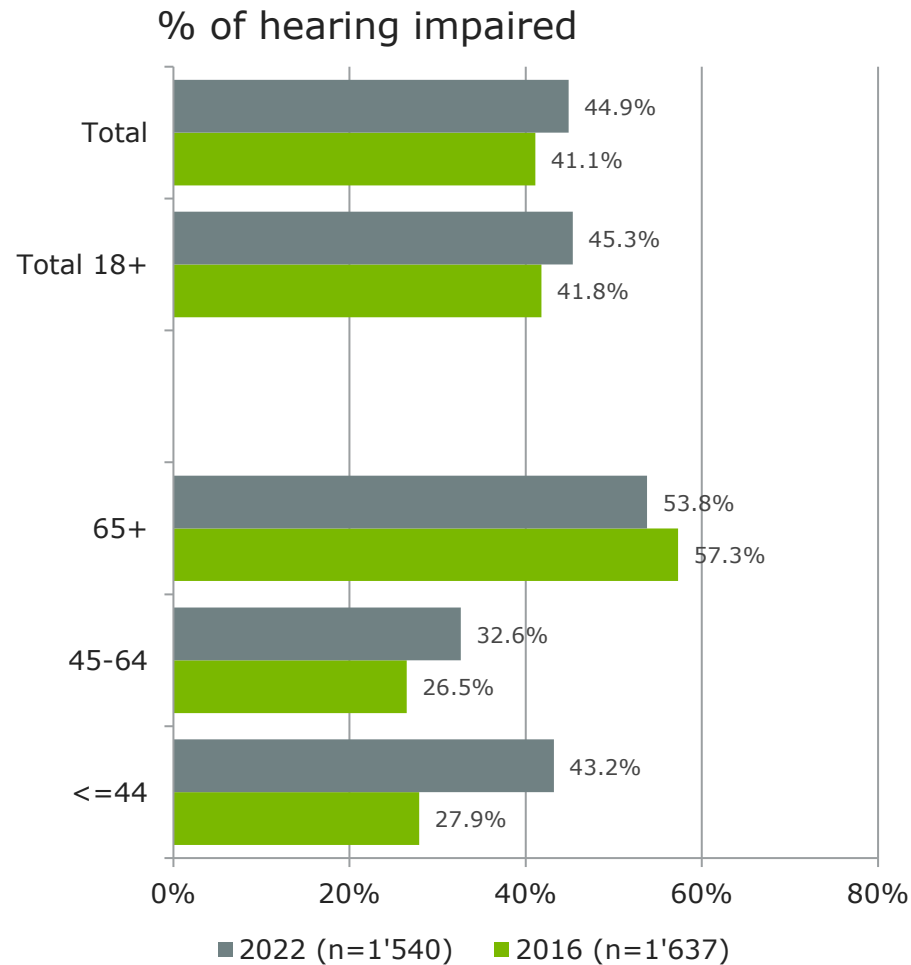
Hearing loss prevalence Netherlands

Self declared hearing loss

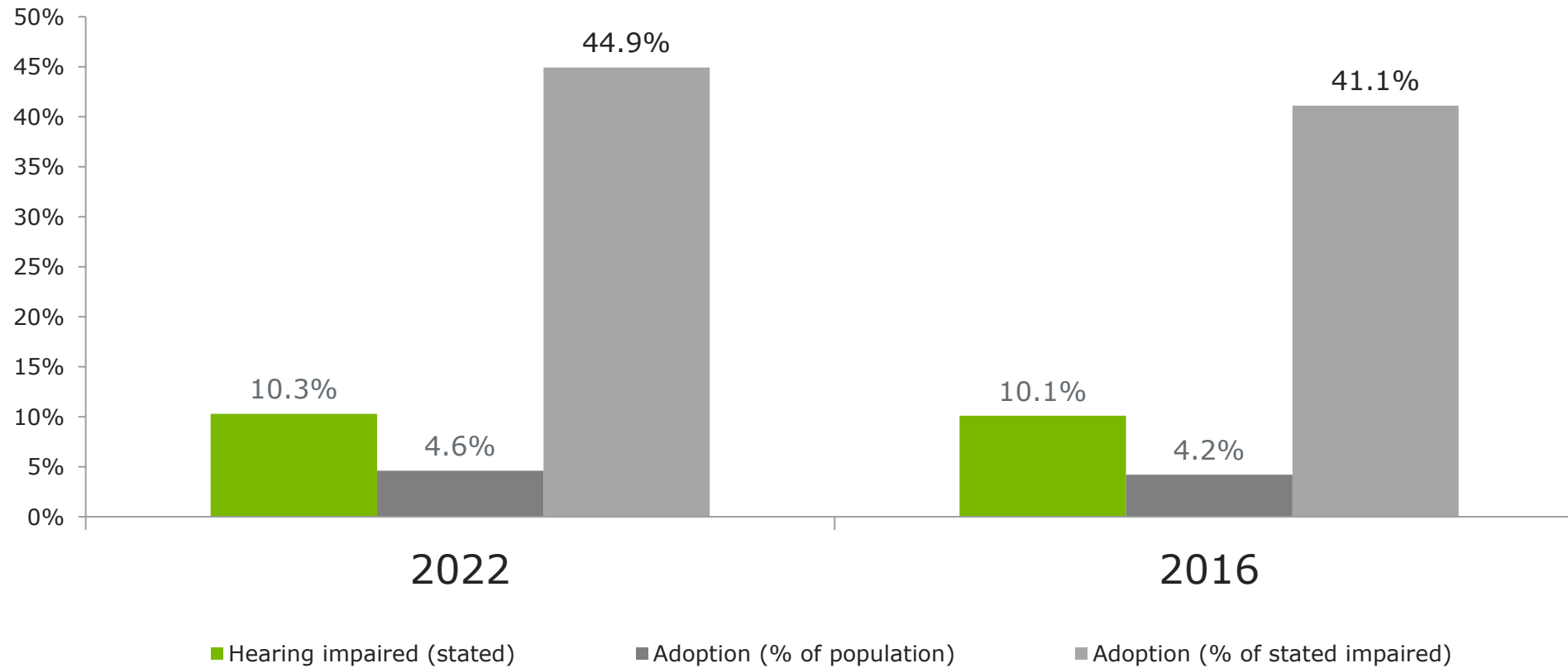




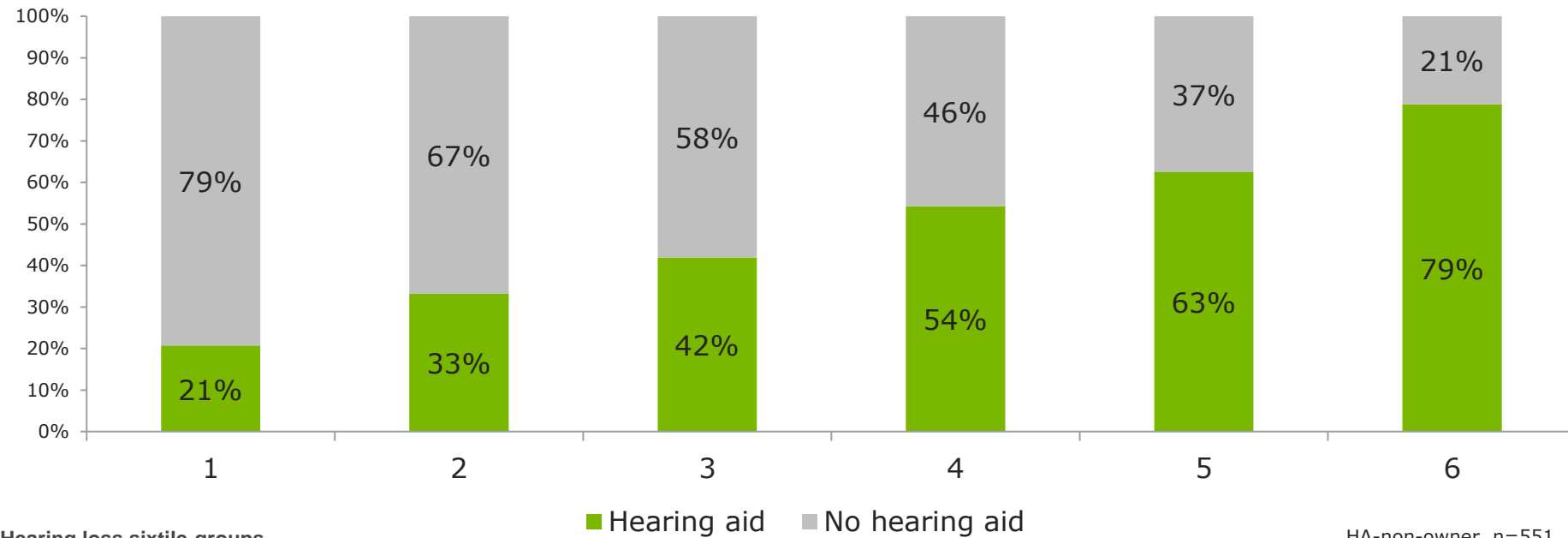
Hearing aid adoption rate: 45% of hearing impaired have hearing aid(s), 76% of them have binaural treatment



Overview hearing loss prevalence and hearing aid adoption



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



HA-non-owner, n=551
HA-owner, n=758

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

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

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



Hearing loss

Hearing loss characteristics: Owners compared to non-owners

	HA-Non-owner n=551	HA Owner n=758	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	44%	24%	34%
Bilateral loss	56%	76%	57%
Perceived loss			
Mild	35%	12%	24%
Moderate	46%	47%	47%
Severe	12%	32%	65%*
Profound	7%	9%	

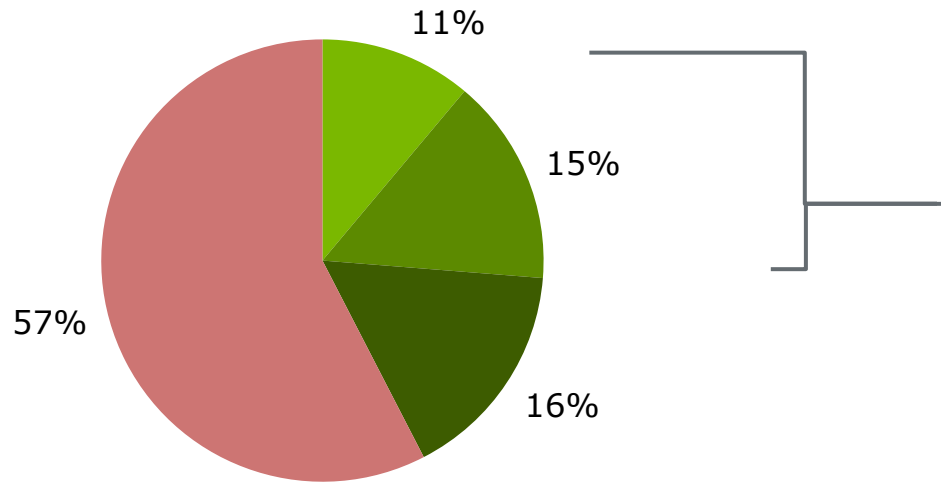
* combined "severe" and "profound" because n is too small

Hearing tests and where hearing is tested

Hearing Tests: 26% had a hearing test in the last 5 years (2016: 27%), most tests done by Audiologists, followed by ENTs and family doctors.

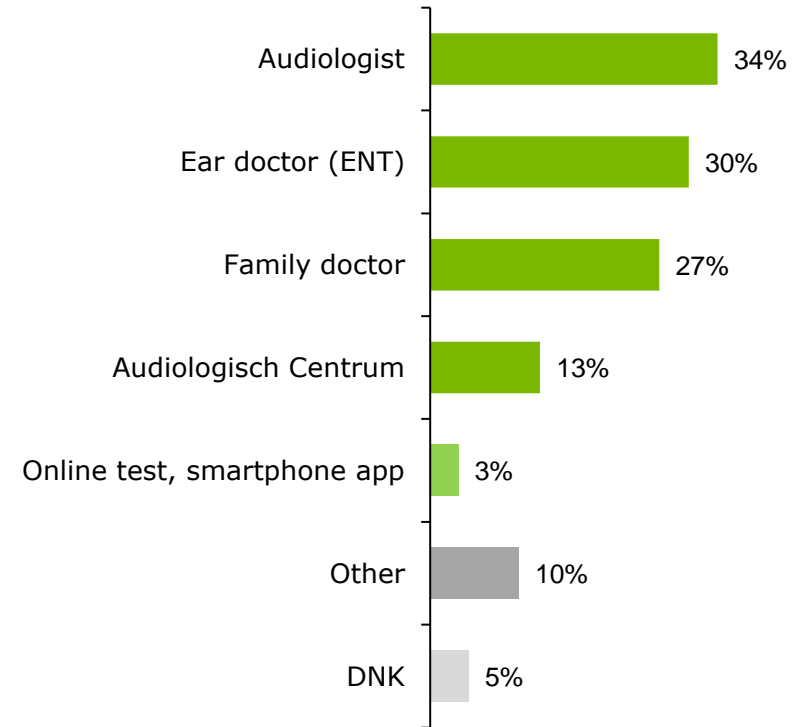
Have you ever taken a hearing test?

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



Base=10'597

Where/how was your hearing tested?

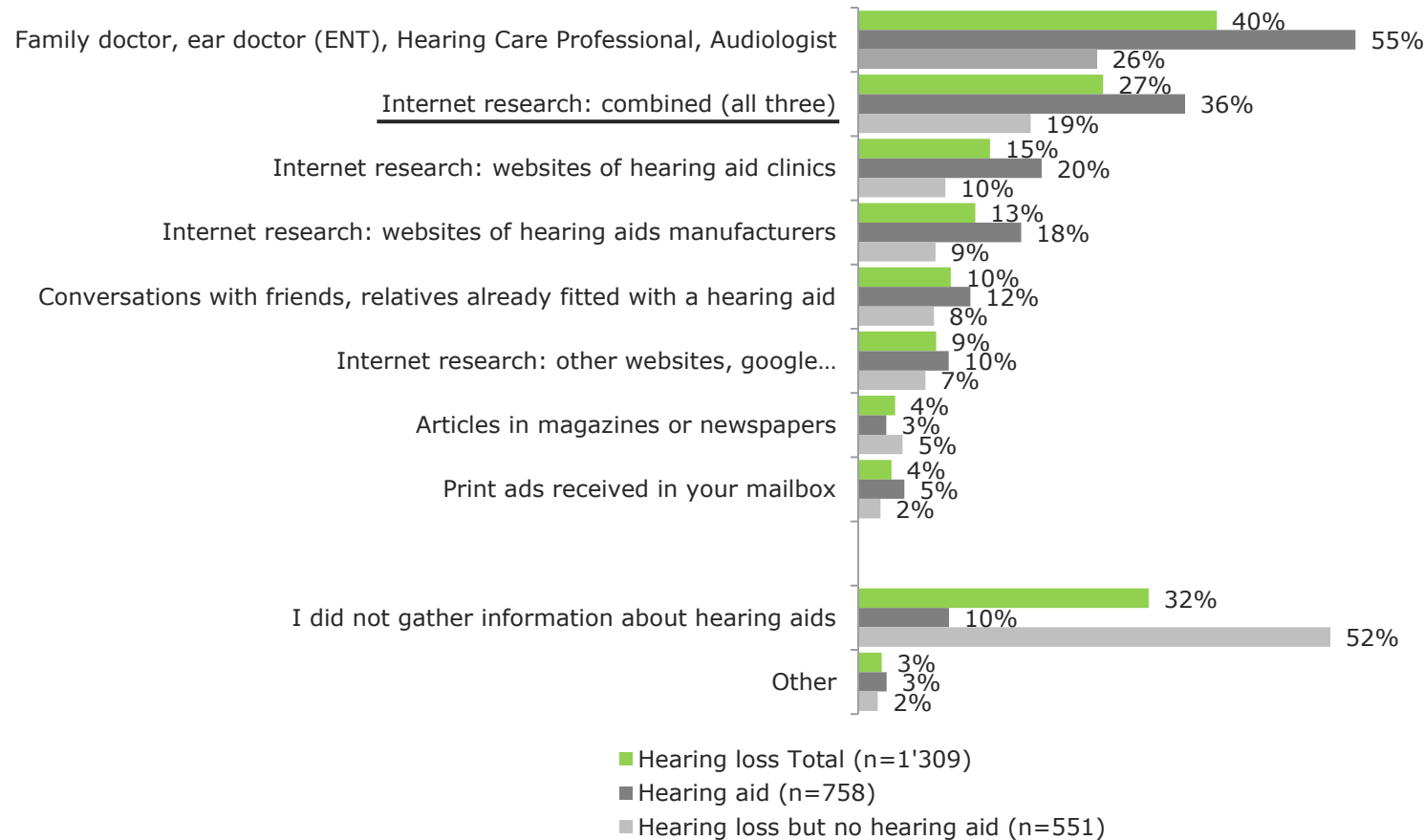


Base= 2'830

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

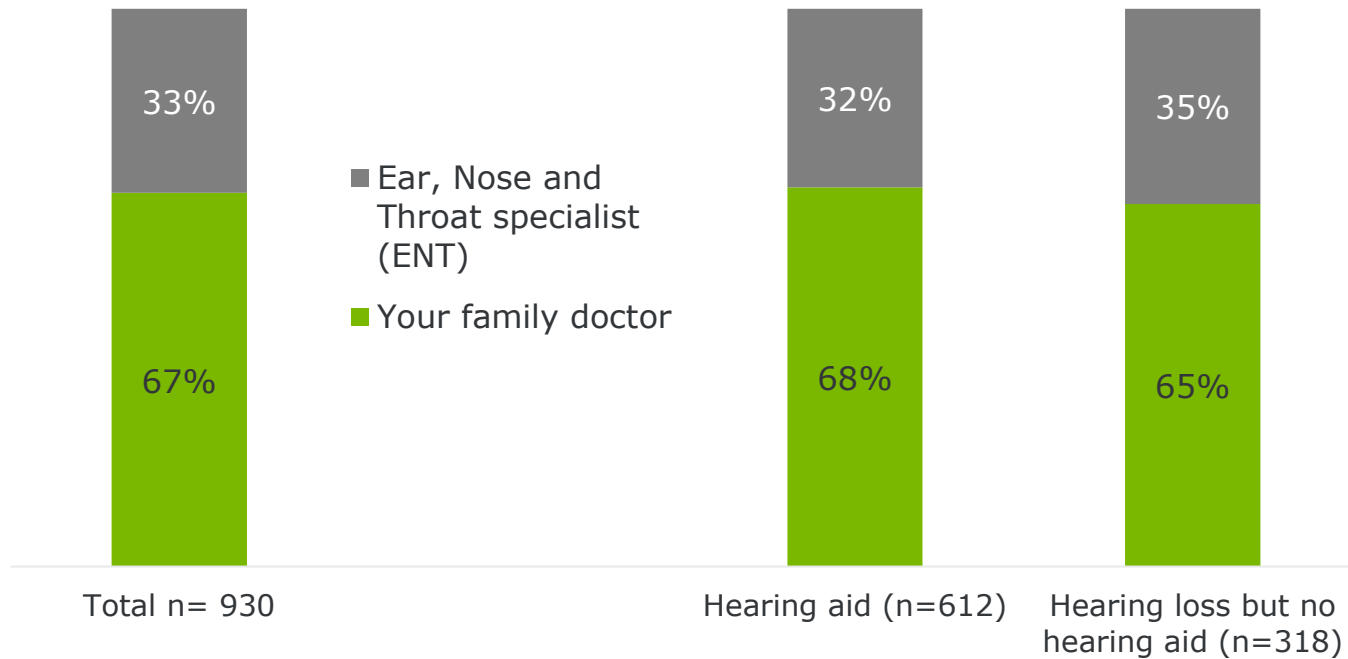
Doctors/HCPs are the most important sources of information and therefore the major gatekeepers.

Where did you gather information about hearing aids?

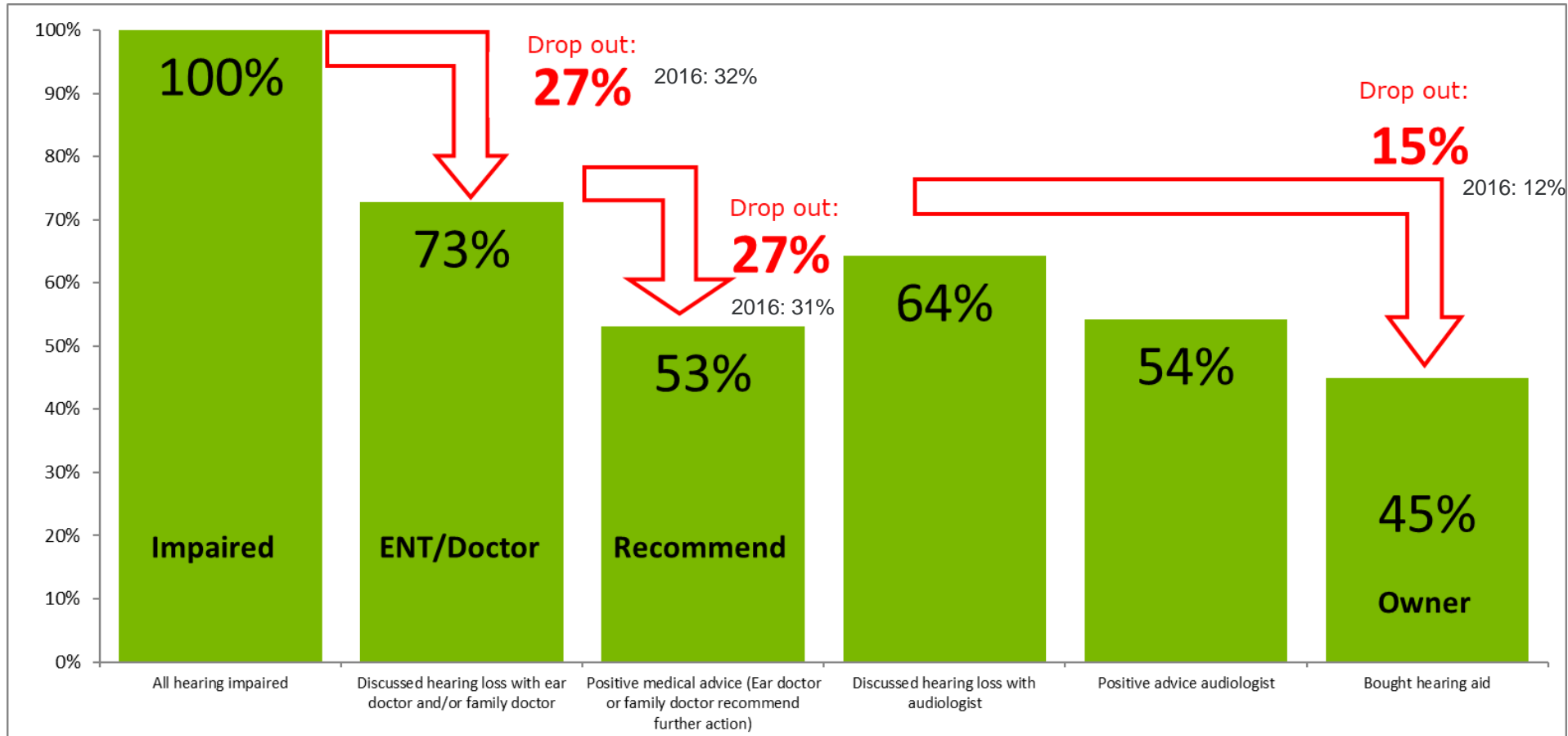


Of those who discussed the hearing loss with a doctor, 2 out of 3 talked to a family doctor first

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



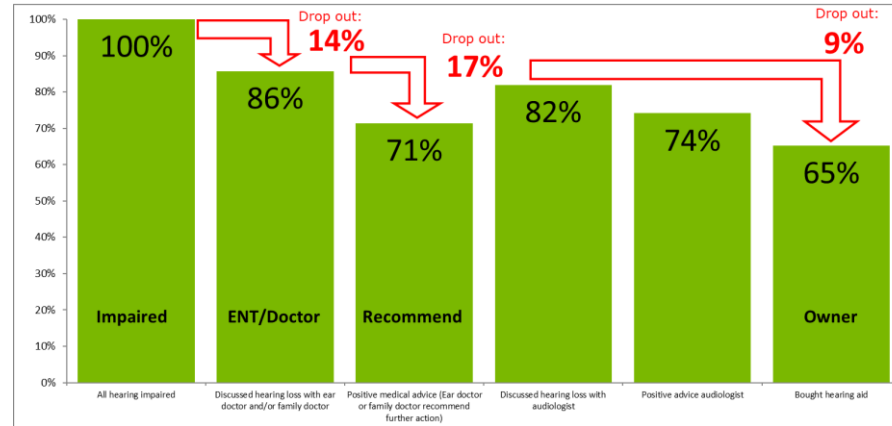
The route to the hearing aid



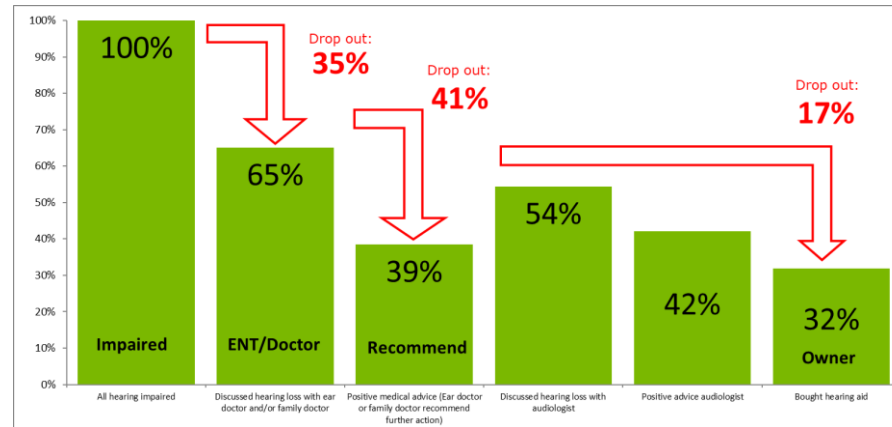
Base: n=1'309

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

Top 50% hearing loss*



Low 50% hearing loss*



Base: n=1'309

* 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:

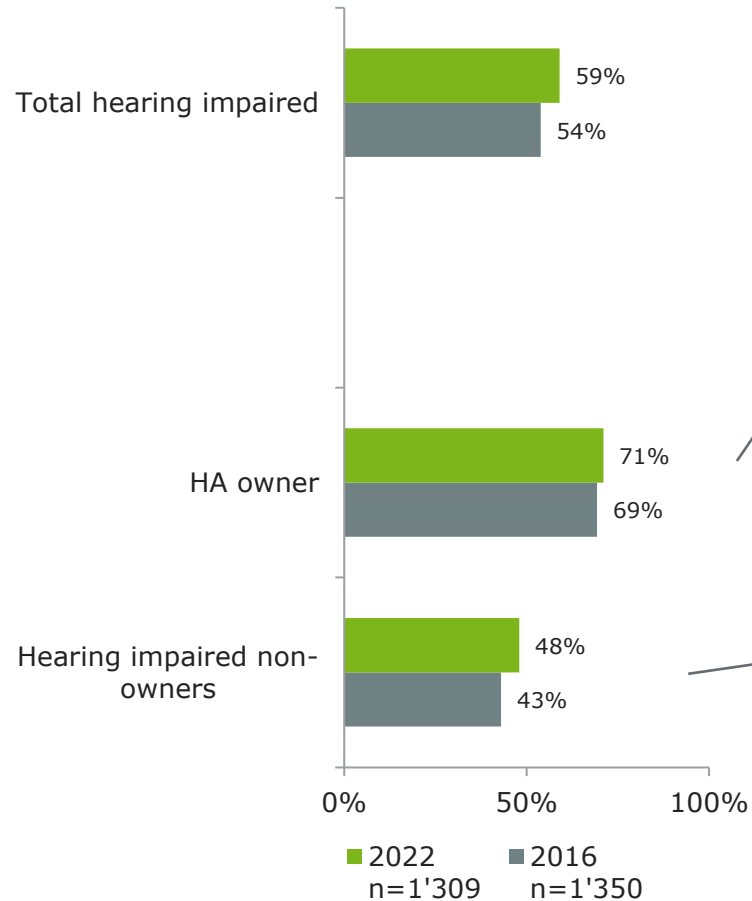
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC - like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

→ 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

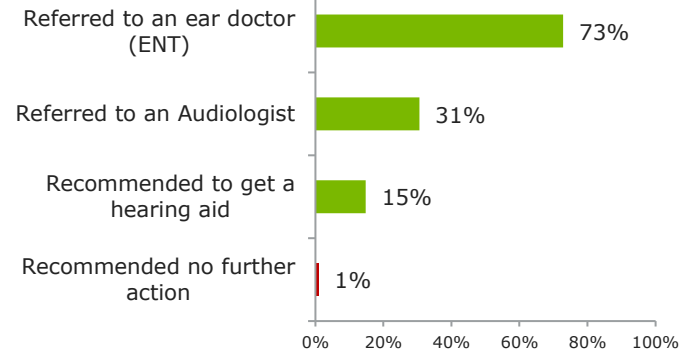
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

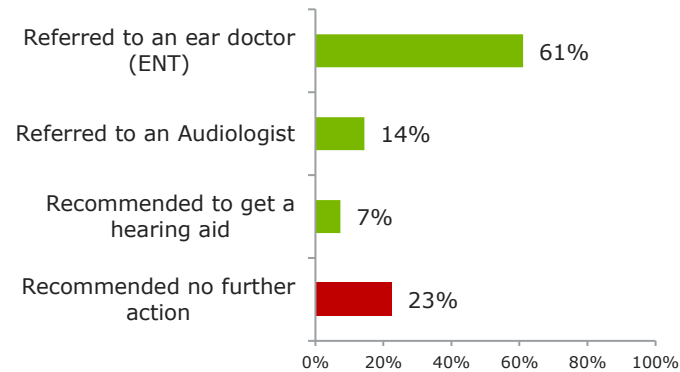


What did he/she recommend ?

HA owner (n=501)



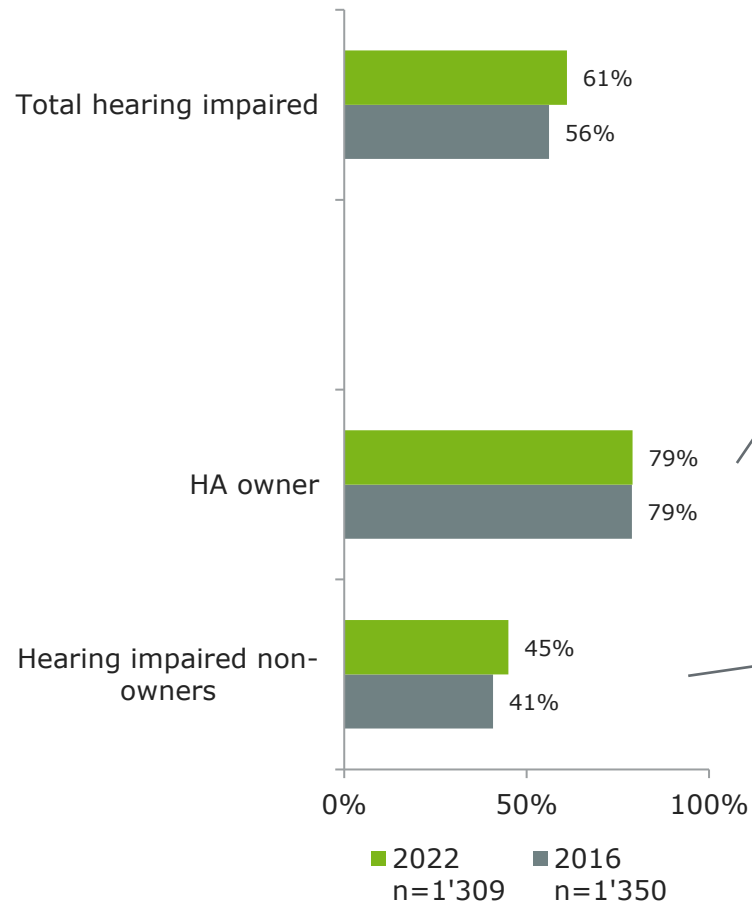
Impaired non-owner (n=258)



The route to the hearing aid: ENT

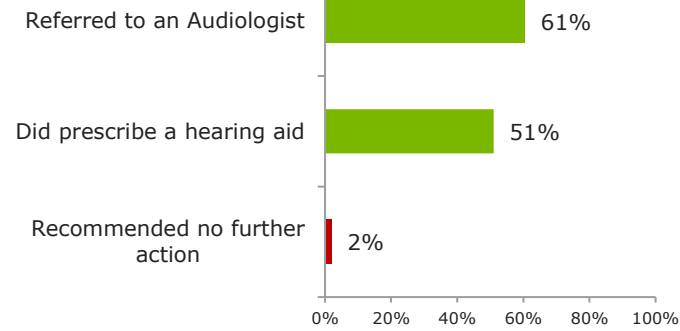
Have you ever discussed your hearing problem with an Ear, Nose and Throat specialist (ENT)?

% Discussed with ENT

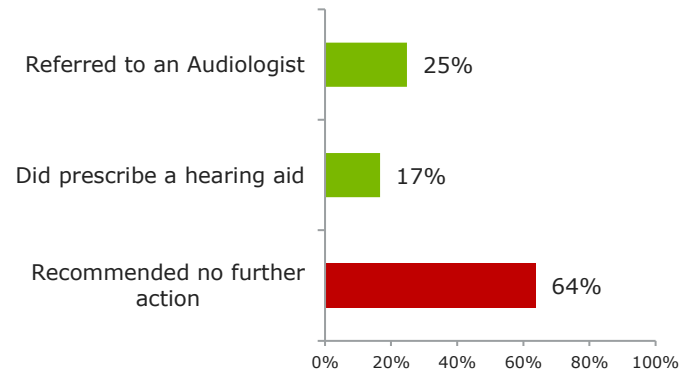


What did he/she recommend ?

HA owner (n=589)



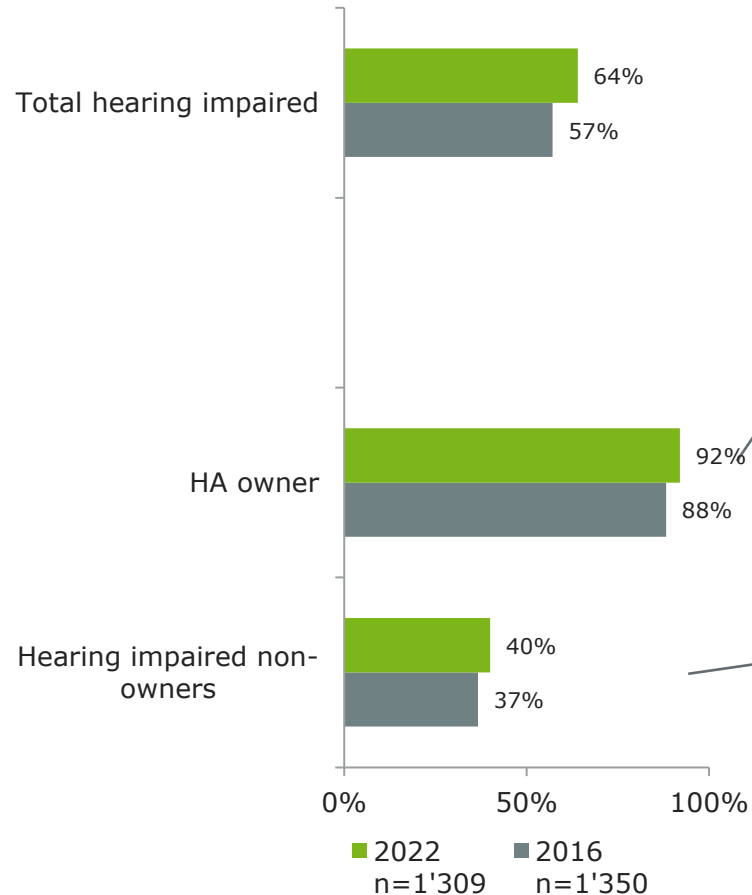
Impaired non-owner (n=262)



The route to the hearing aid: Audiologist

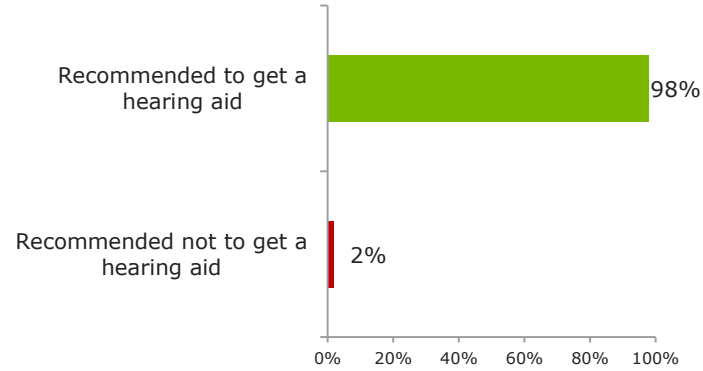
Have you ever discussed your hearing problem with an Audiologist?

% Discussed with Audiologist

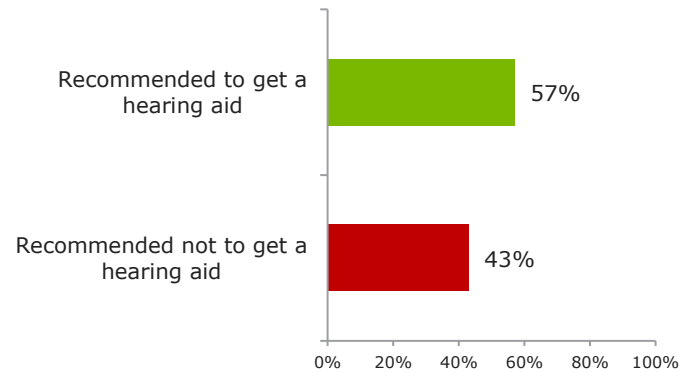


What did he/she recommend ?

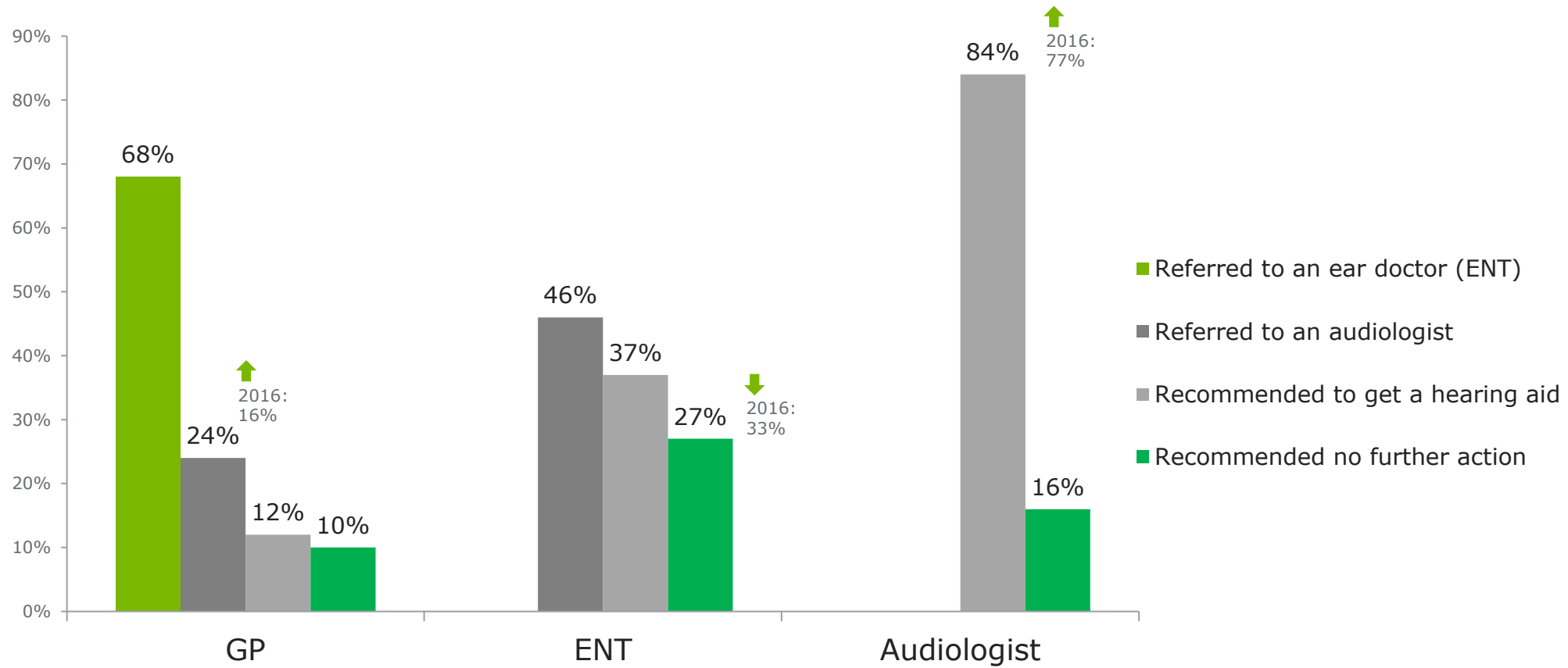
HA owner (n=704)



Impaired non-owner (n=227)



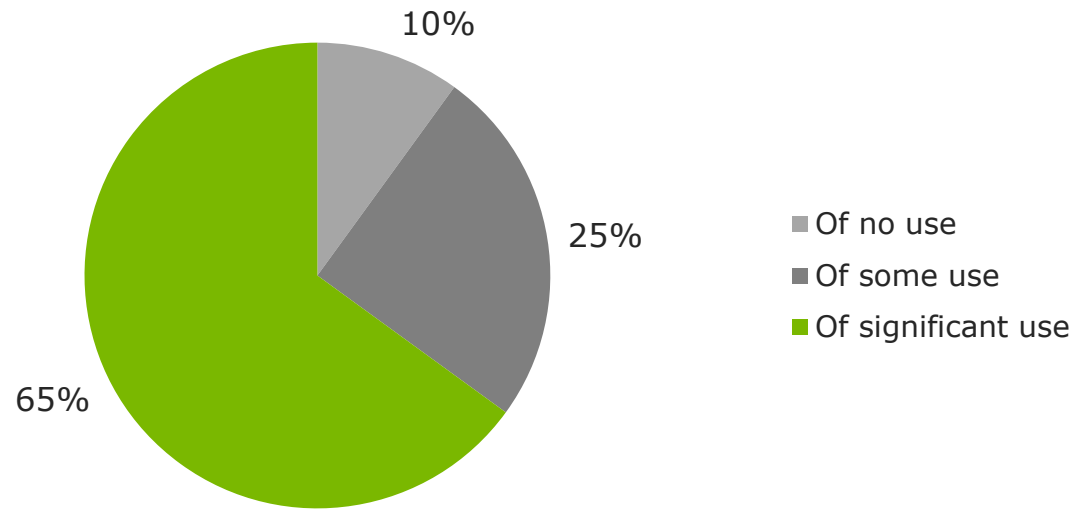
Recommendations by profession



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

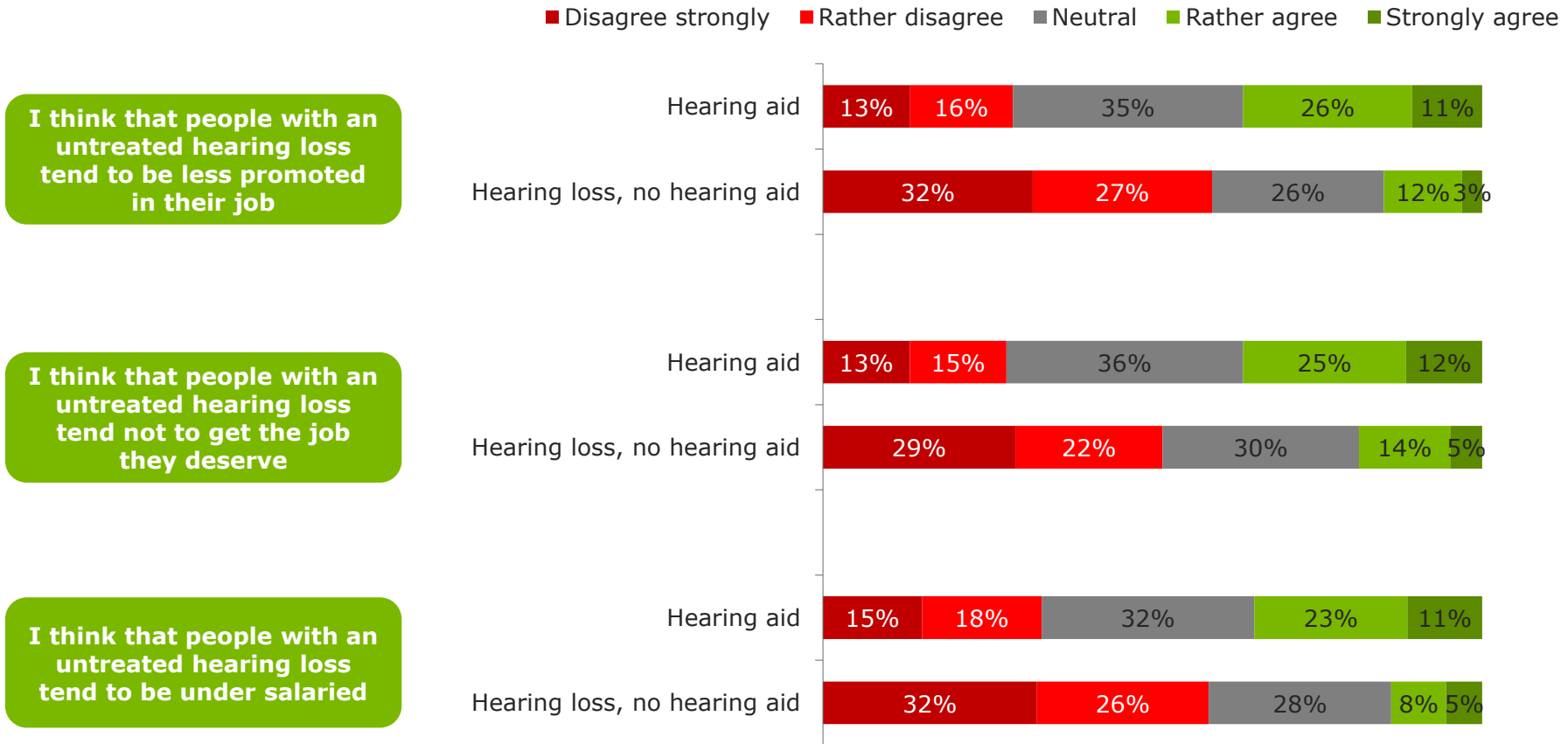
Work competitiveness: 90% of the working hearing aid owners state their hearing aid(s) are useful on their job.

How useful are your hearing aids on your job?



Base: n=232

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



Base: Hearing loss, no hearing aid n=398/ hearing aid n=498





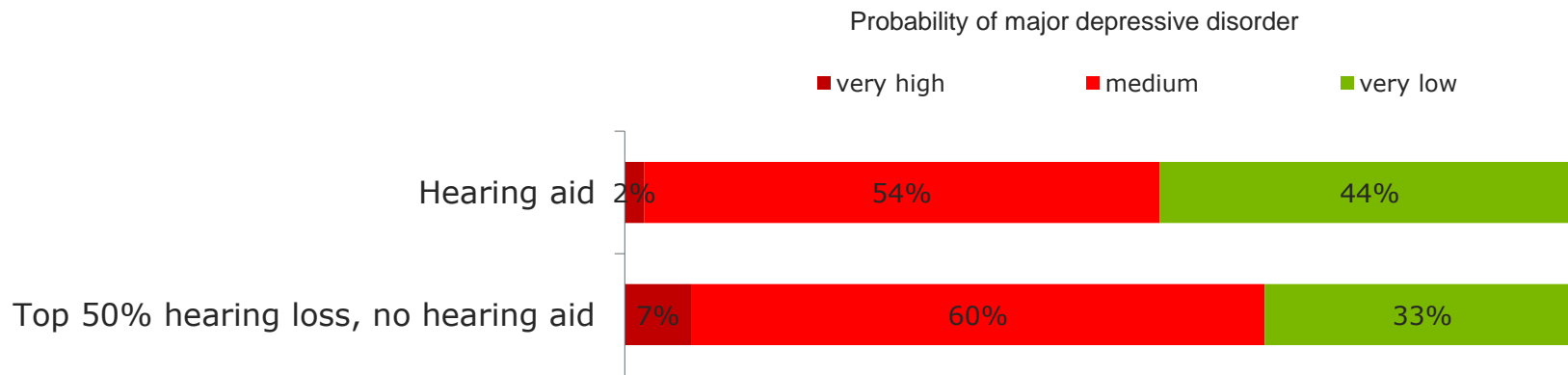
General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*).

Depression symptoms:

PHQ-2 Screening:

In the last 2 weeks:

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



Base: hearing aid n=580 / top 50% HL, no hearing aid =112

*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:

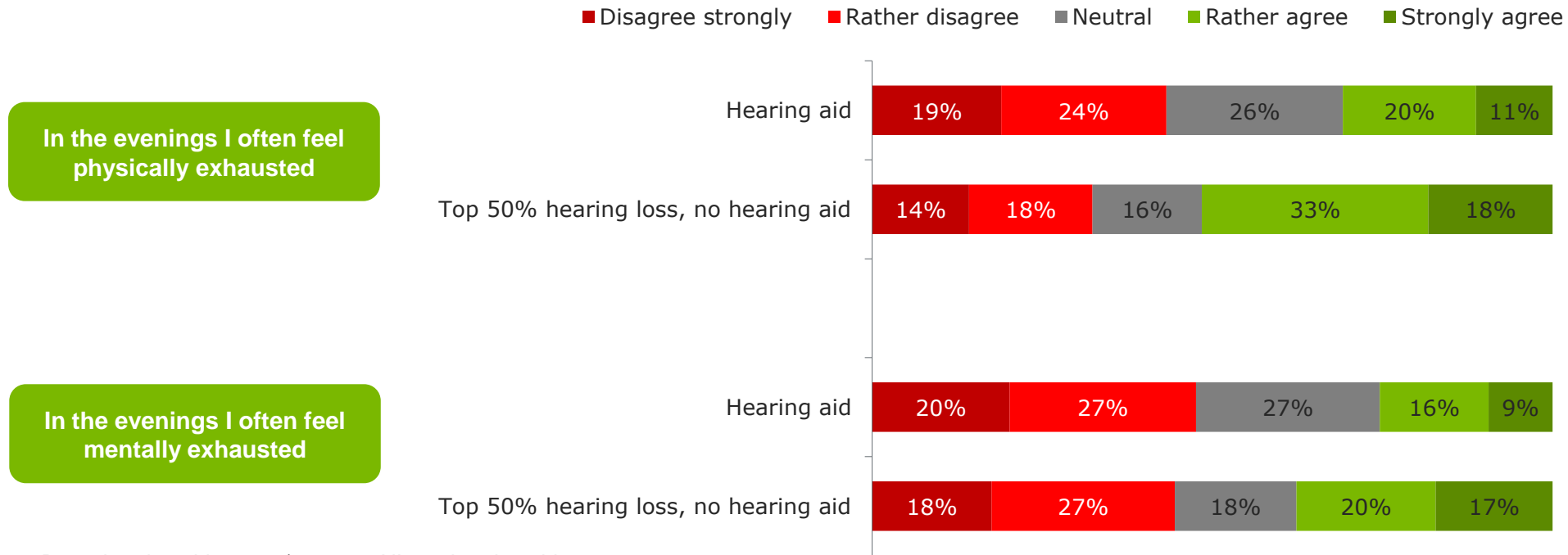
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC - like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

→ 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



Base: hearing aid n=571 / top 50% HL, no hearing aid =112

*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:

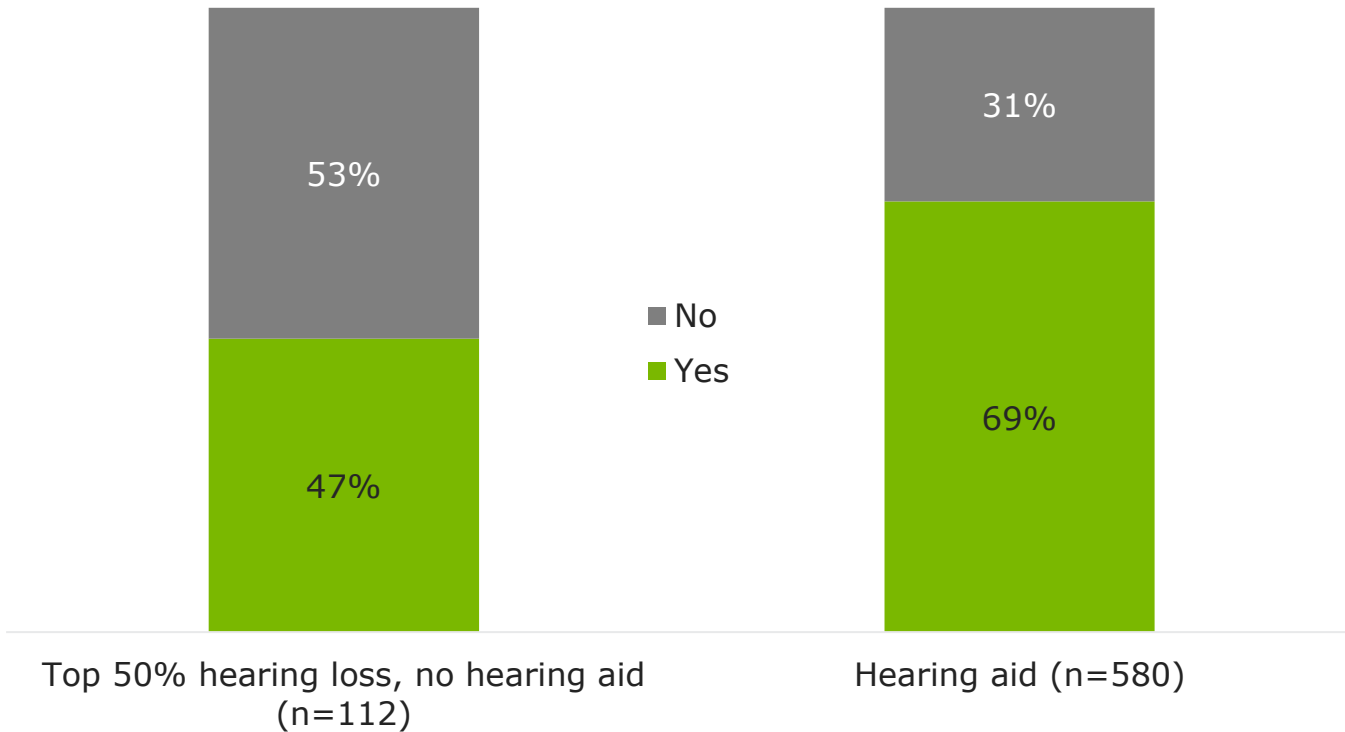
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC - like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

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



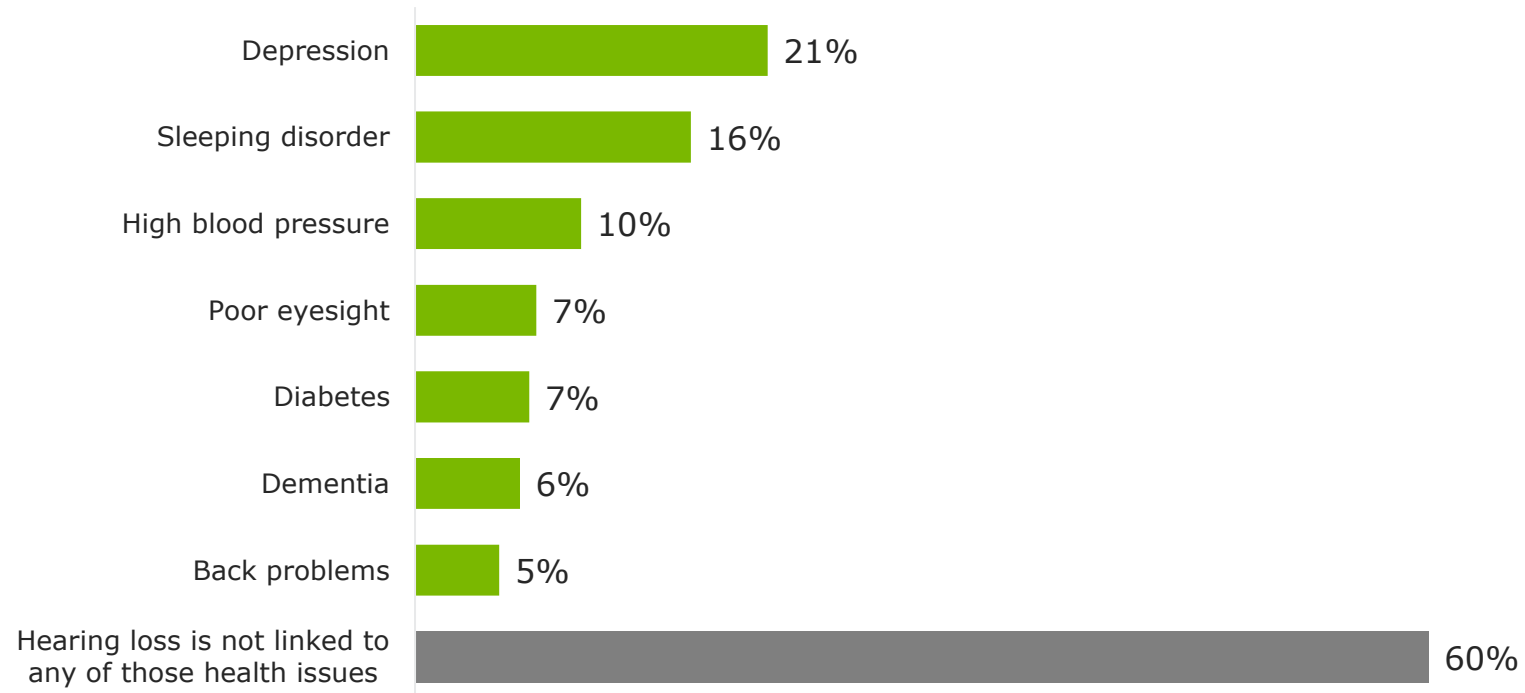
General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids

Are you generally satisfied with the quality of your sleep?



21% of all hearing impaired think that hearing loss could be linked to depression

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

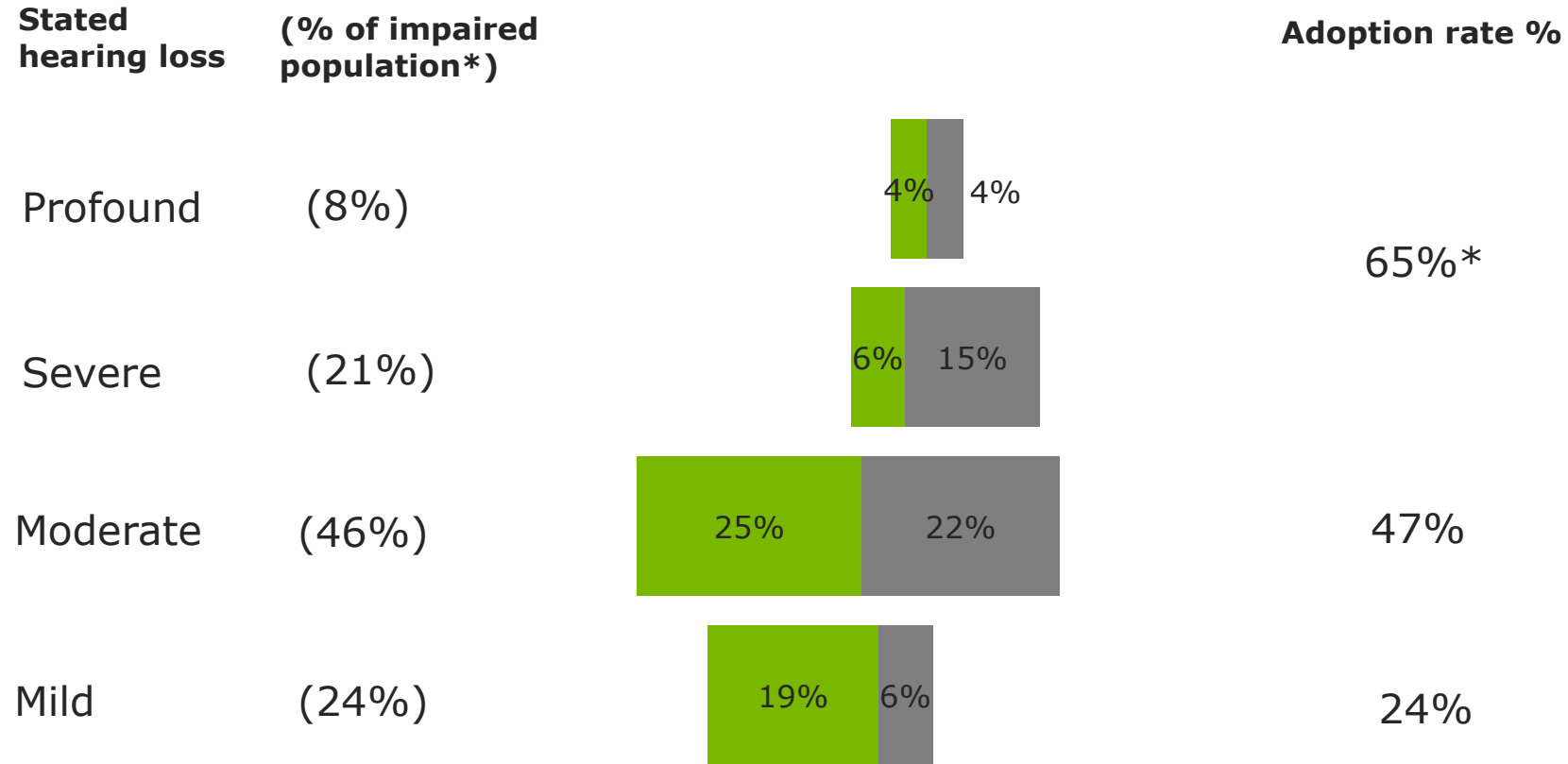


Hearing impaired, n=1'309

3. Analysis of hearing aid owners

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

Low adoption rates within mild hearing loss



Base: n=1'309

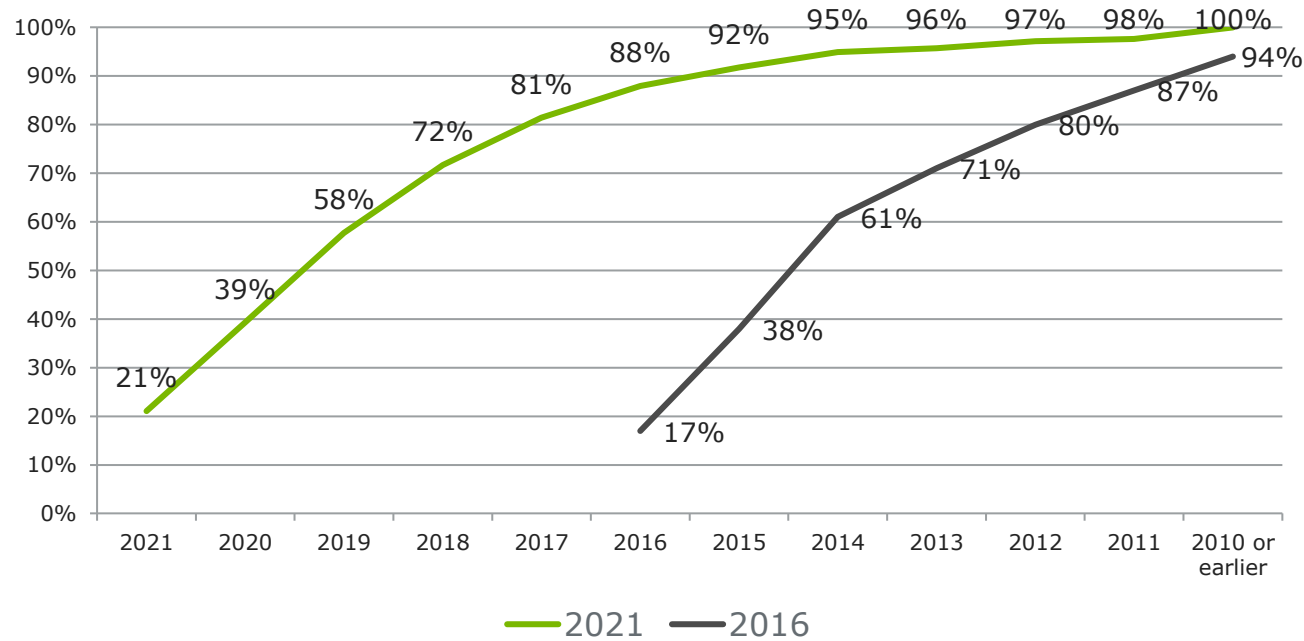
Sums can differ from 100% due to rounding

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

■ No hearing aid
■ Hearing aid

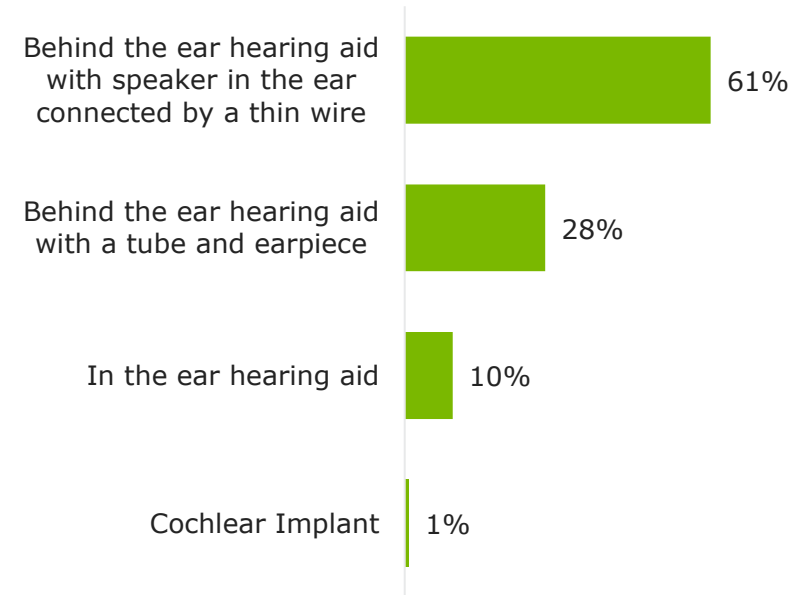
58% of the currently owned HAs were acquired in 2019 or later RIC is the most often purchase type of HA

Year of purchase



Age of currently owned HAs (Mean):
2022: 3.1 years
2016: 3.1 years

Type of HA

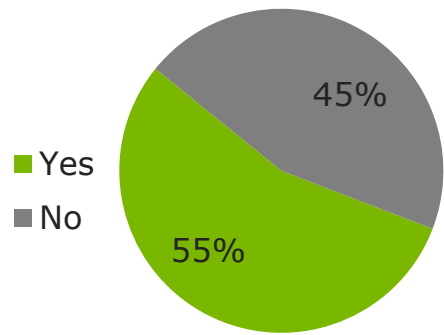


HA-owner, n=744



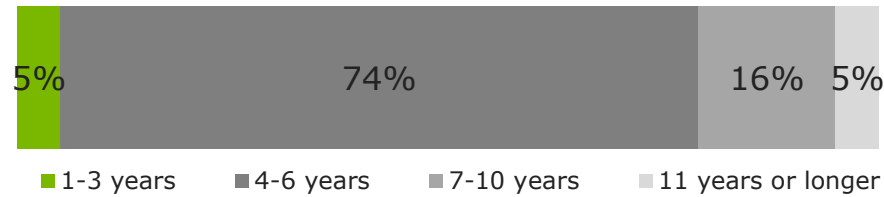
On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 5 years before they are being replaced.

Current HAs = first HAs?



HA-owner, n=758

How many years did you own your previous HAs?



Base: n=342

Age of HA before it has been replaced:
 2022: 5 years (median)
 2016: 5 years (median)

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



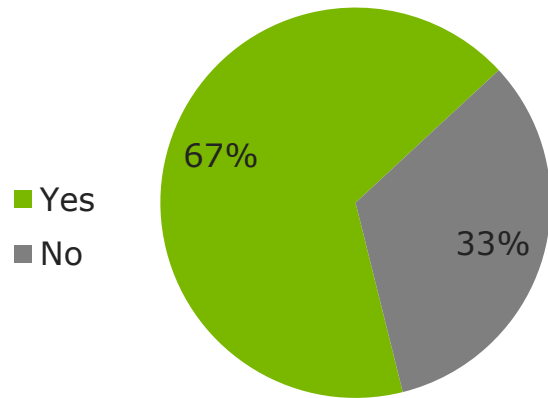
■ 1 year ■ 2 years ■ 3 years ■ 4-6 years ■ more than 6 years

Base: n=363



67% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on social life.

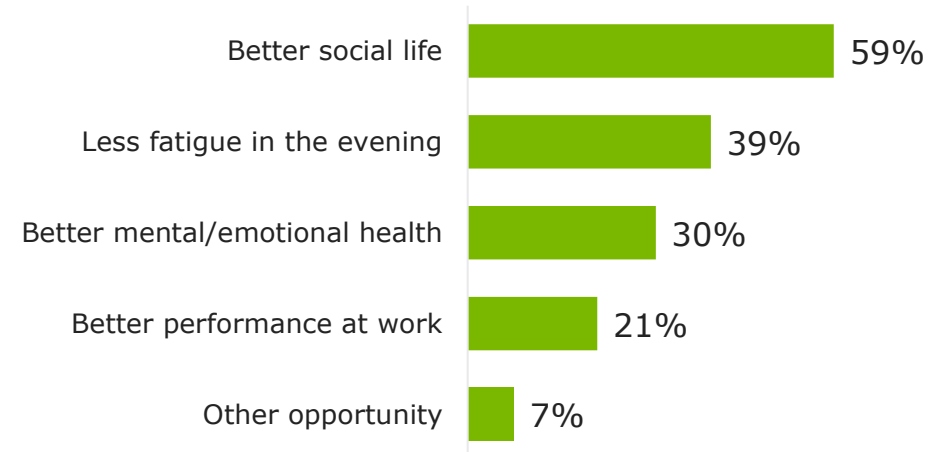
Thinking back before you obtained your first hearing aid(s): do you think, you should have gotten them sooner?



HA-owner, n=758

IF YES:

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

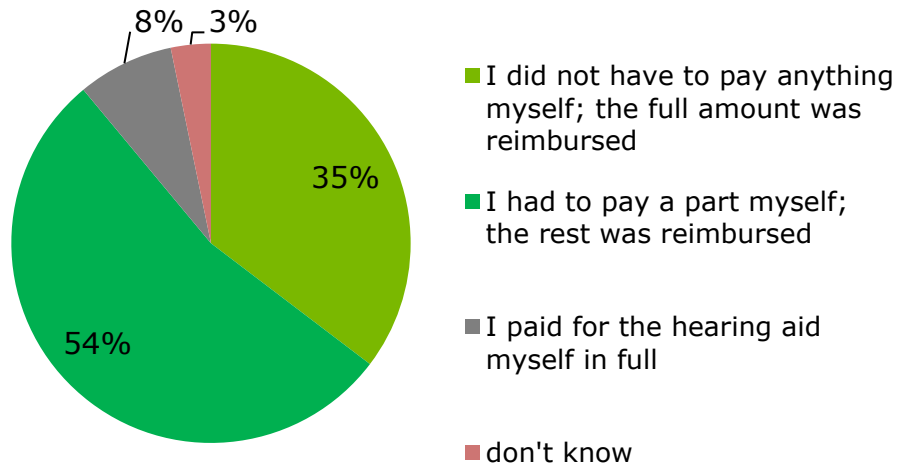


Base: n=503

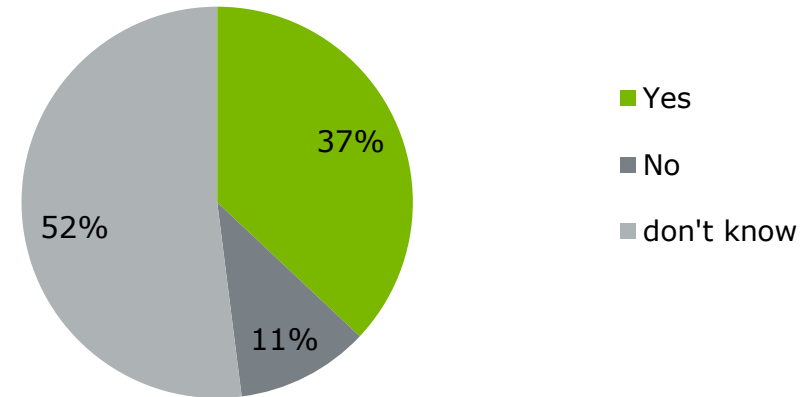
89% received 3rd party reimbursement. Information deficit non-owners: only 37% know whether HAs would be reimbursed

Owners: To what extent did you pay for your hearing aid yourself?
 This is the amount you paid the hearing care professional for the device; therefore excluding the costs of any extras such as dry box, cleaning set, extra batteries, etc.

Non-owners: Will your hearing aid(s) be fully or partially reimbursed, as far as you know now?
 (health insurance, ...)



HA-owner, n=758



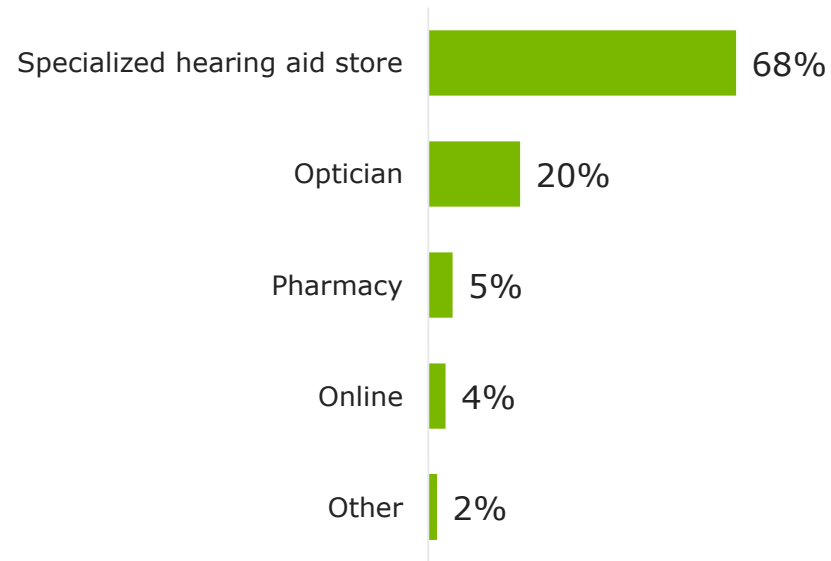
HA-non-owners, n=551



Specialized hearing aid stores are by far the preferred place for obtaining hearing aids (both for owners and non owners).

OWNERS:

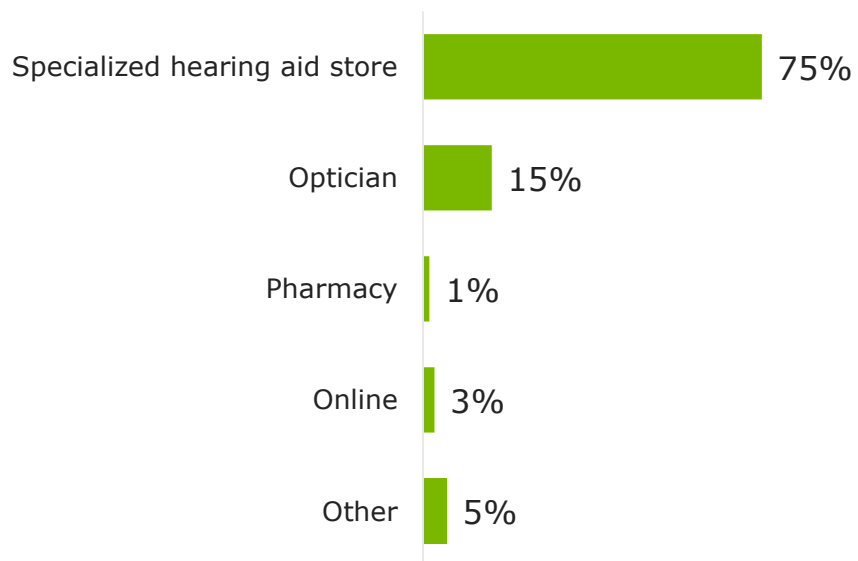
Where was your most current hearing aid obtained?



HA-owner, n=758

NON OWNERS:

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



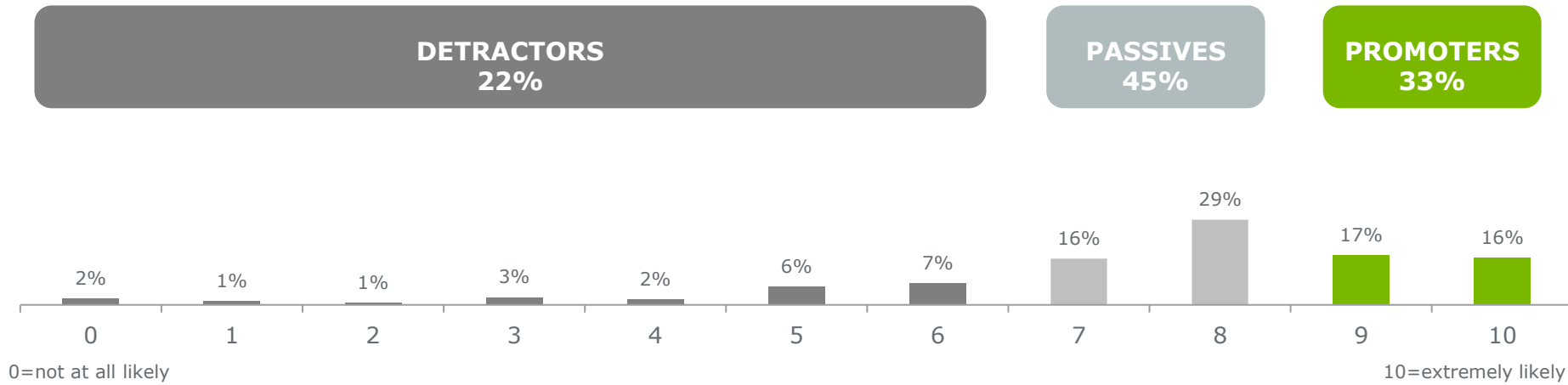
HA-non-owner, n=551



NPS place of purchase

Recommendation intention of the place where the hearing aid(s) have been obtained is good, with a positive NPS score of 11.

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



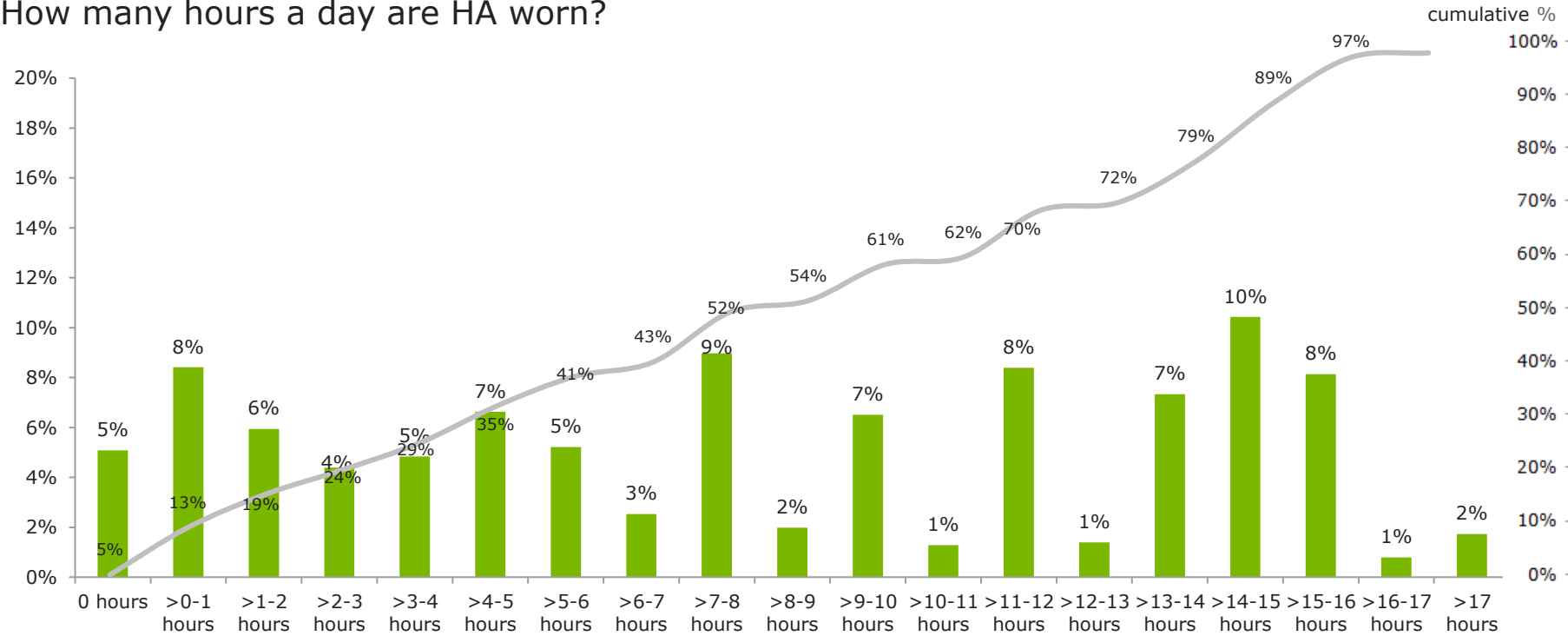
NPS = PROMOTERS – DETRACTORS = 11

HA-owner, n=758



On average, HAs are worn 8.6 hours a day

How many hours a day are HA worn?



HA worn:
 2022 Mean: 8.6 hours/day
 2016 Mean: 9.1 hours/day

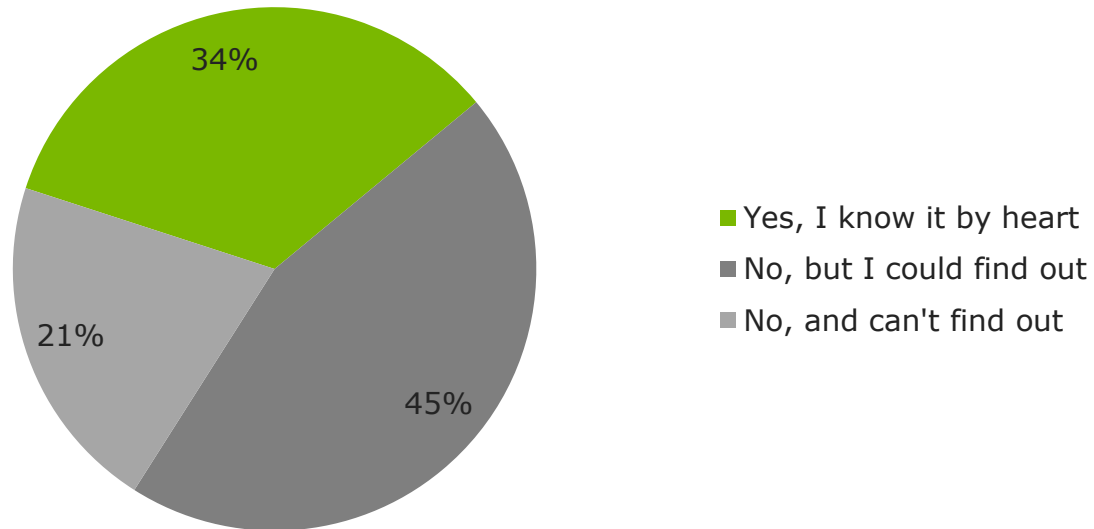
In the drawer (0 hours):
 2022: 5%
 2016: 5%

HA-owner, n=758



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)?



HA-owner, n=758



44% of the HA owners use an accessory/app for their hearing aids, 66% of those are satisfied with it.

Have you been informed by your hearing care professional about hearing aid accessories, such as TV-Streamer/ Apps / Remote Control / etc. ? (HA owners, n=758)

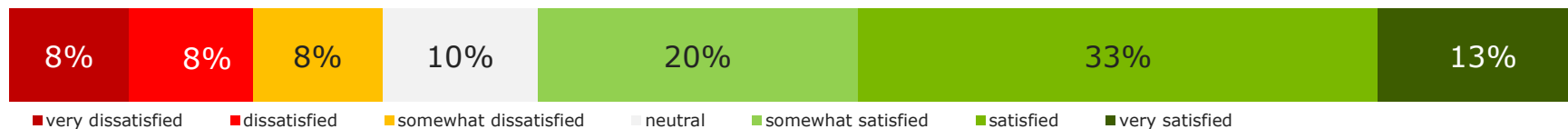


Do you personally use accessories for your hearing aids (TV-Streamer/ Apps / Remote Control / etc.) ? (HA owners, n= 758)



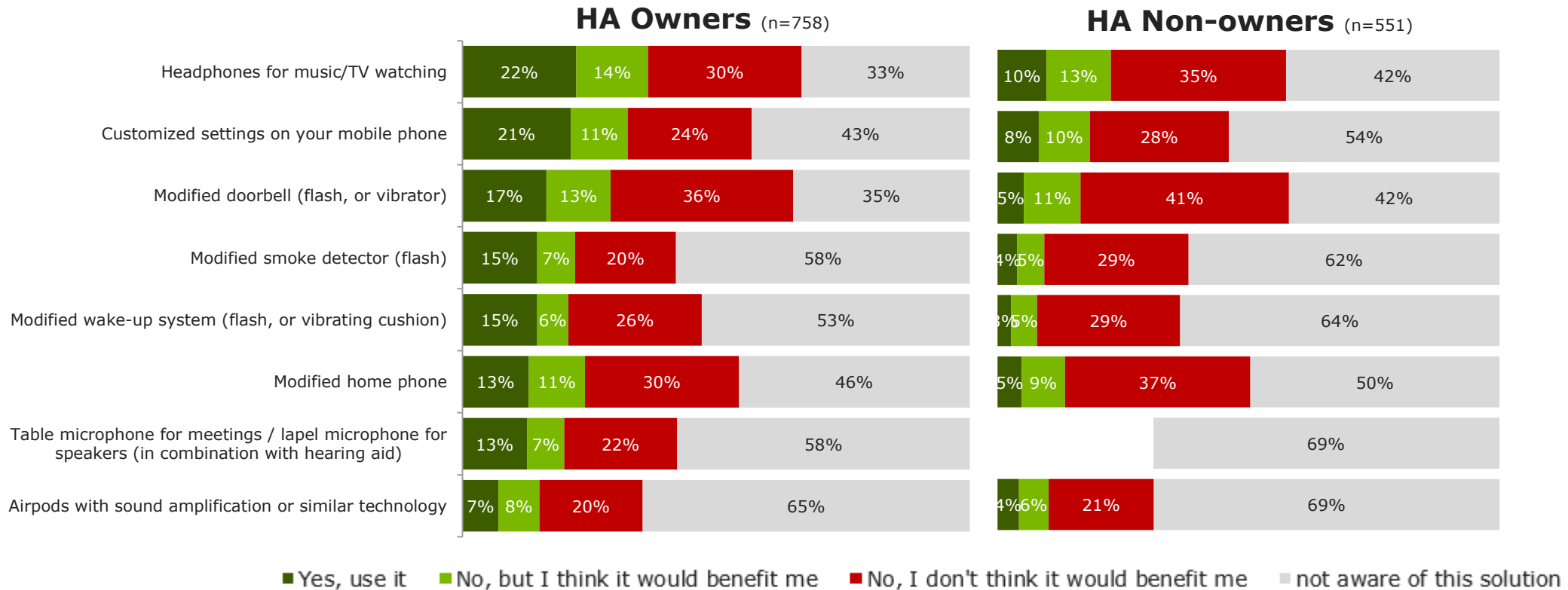
IF ACCESSORIES USED (n=315):

Overall, how satisfied with the performance of your accessorie(s)?



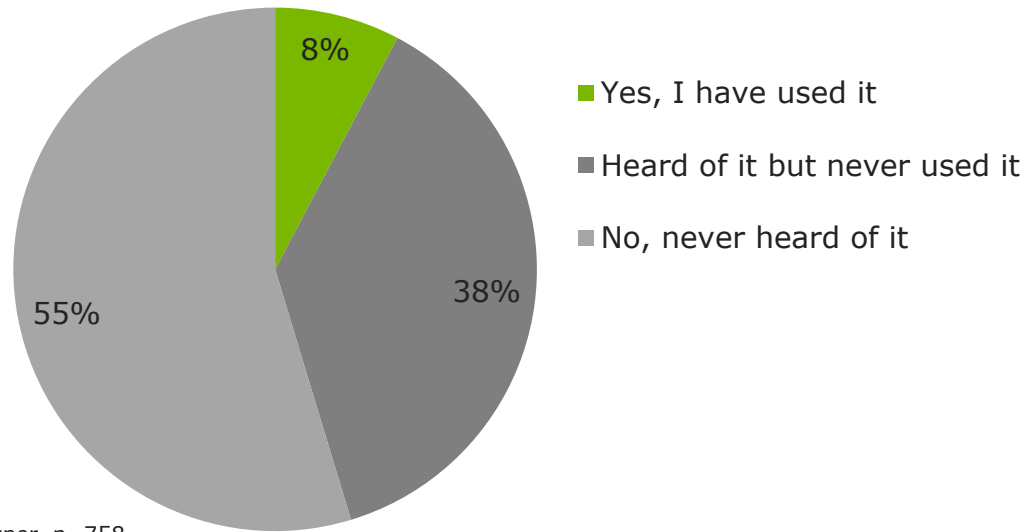
Awareness and usage of solutions/alternatives for hearing impaired is higher among HA owners. Headphones and customized mobile phone settings are the most often used solutions.

Are you aware/do you use the following solutions/alternatives for the hearing impaired?



8% of the HA owners have already used remote fitting, but also more than half of them have never heard of it.

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

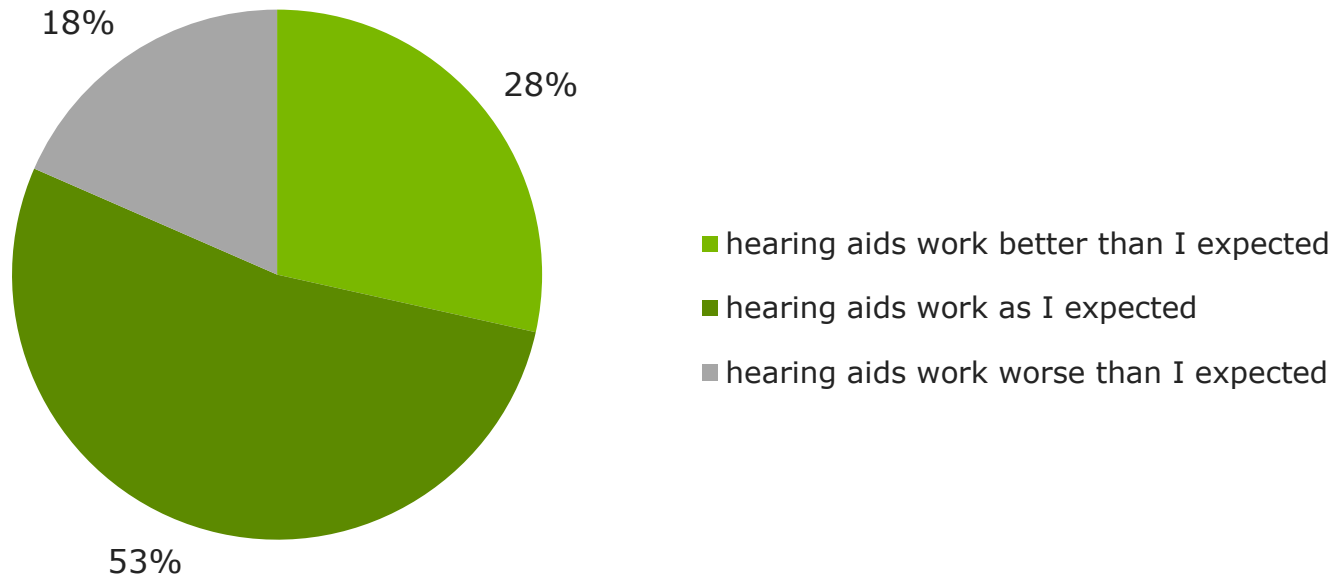


HA-owner, n=758

Satisfaction with hearing aids and drivers

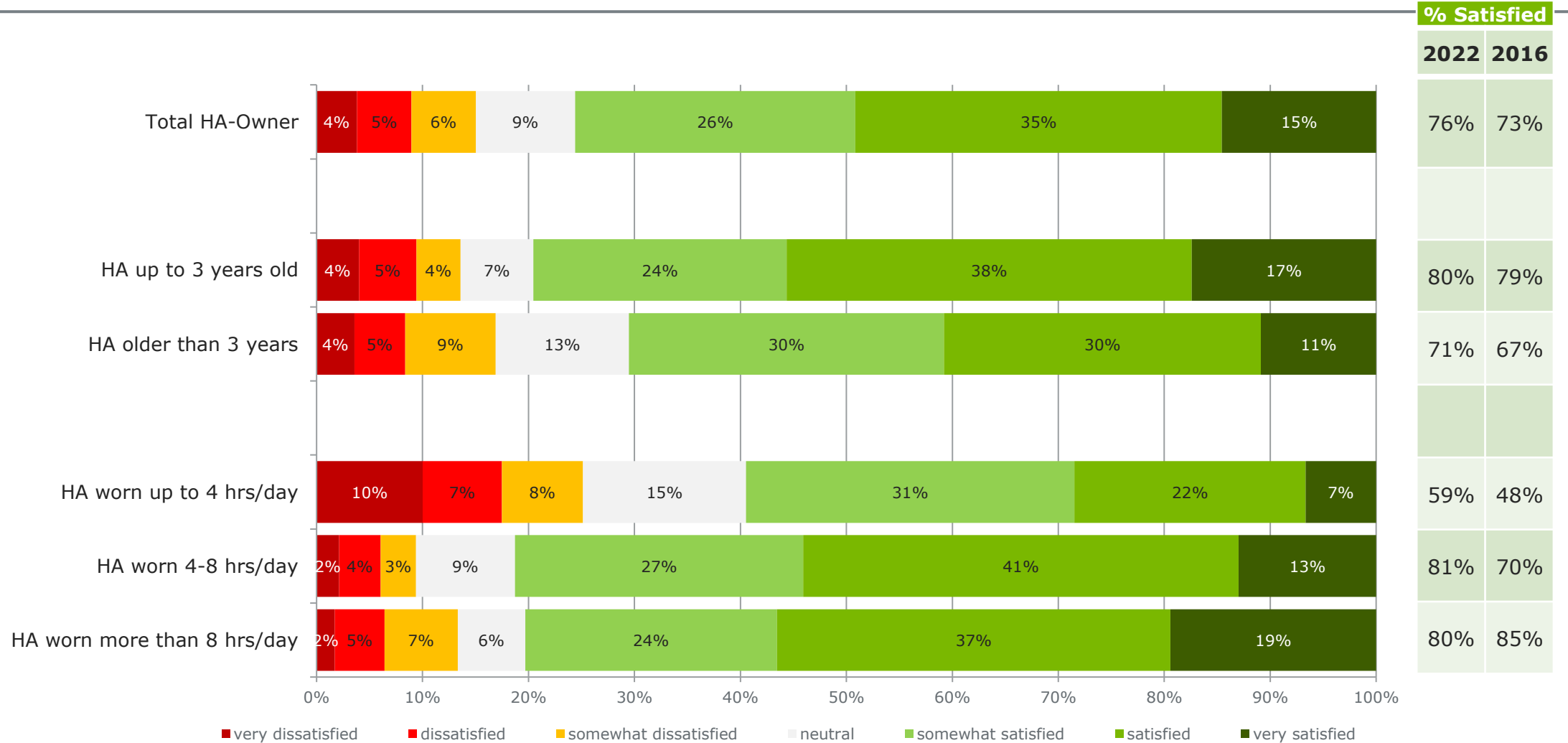
82% of the hearing aid owners say their hearing aid works better than or as expected

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

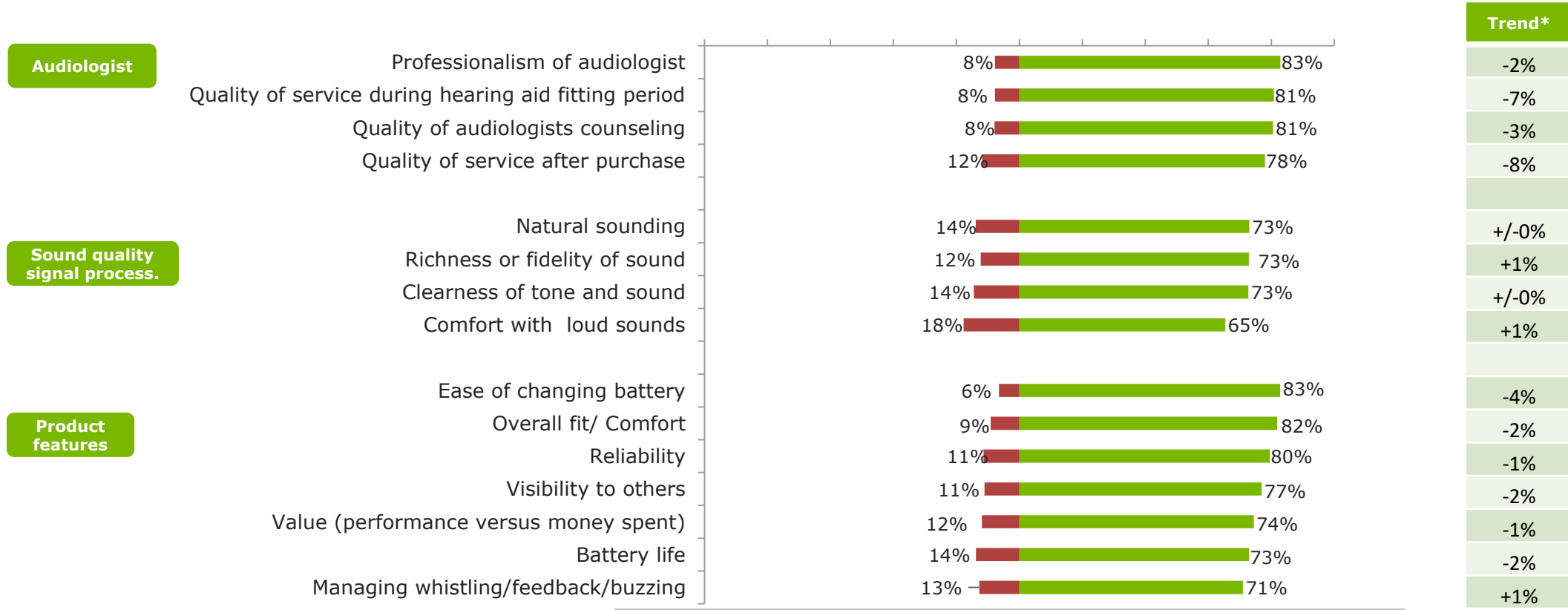


Base: n=758

Overall satisfaction with HA: 76% of hearing aid owners are satisfied with their hearing aid(s)



Satisfaction with current hearing aids



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

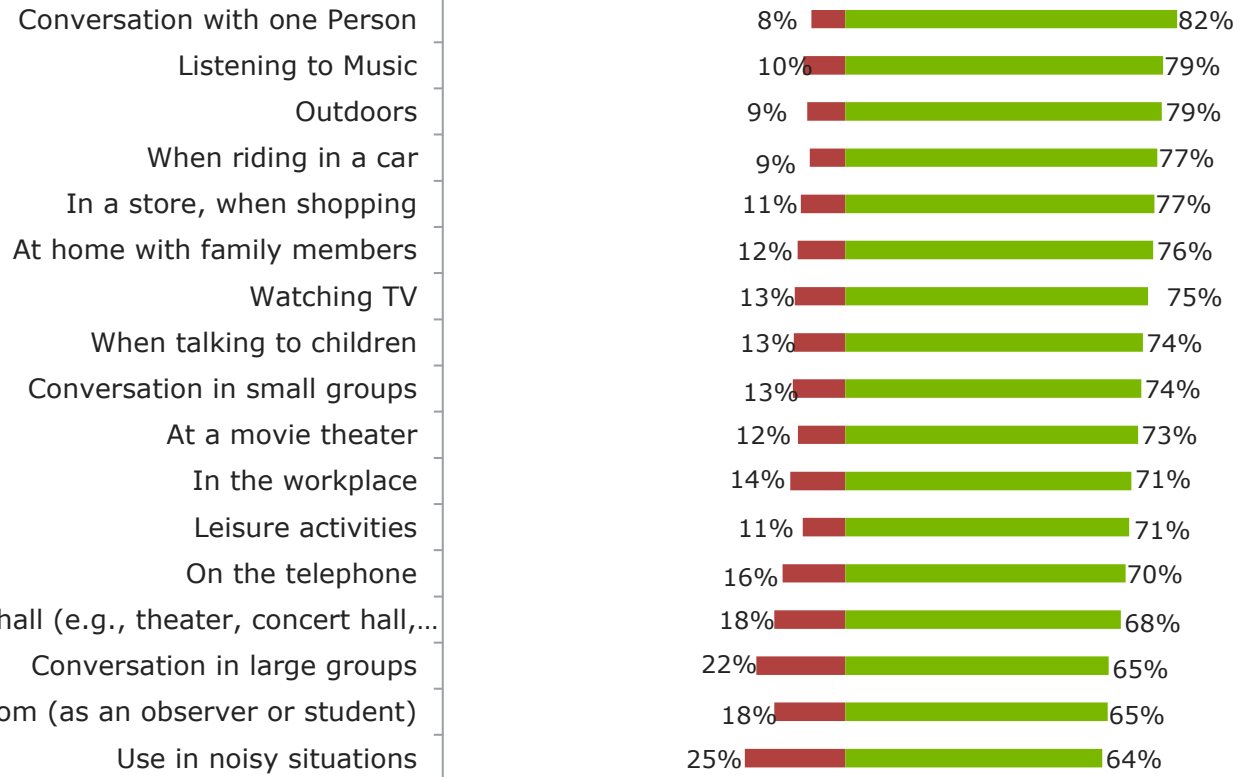
■ dissatisfied ■ satisfied HA-owner, n=758

*% of satisfied HA owners compared to 2016



Satisfaction with current hearing aids

Listening situation



Trend*
-5%
+2%
-2%
-1%
-5%
-5%
-2%
-3%
-2%
+4%
+3%
+2%
-1%
+1%
+/-0%
-1%
+2%

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

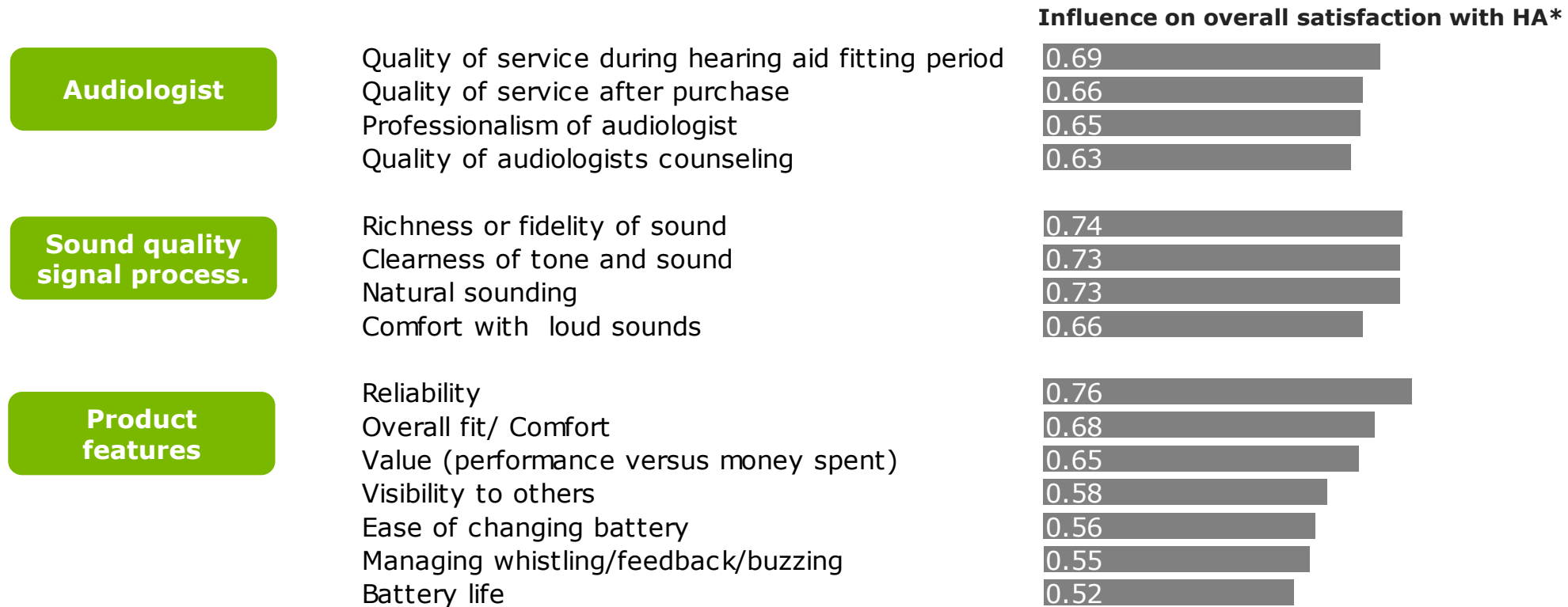
*% of satisfied HA owners compared to 2016

■ dissatisfied ■ satisfied

HA-owner, n=758



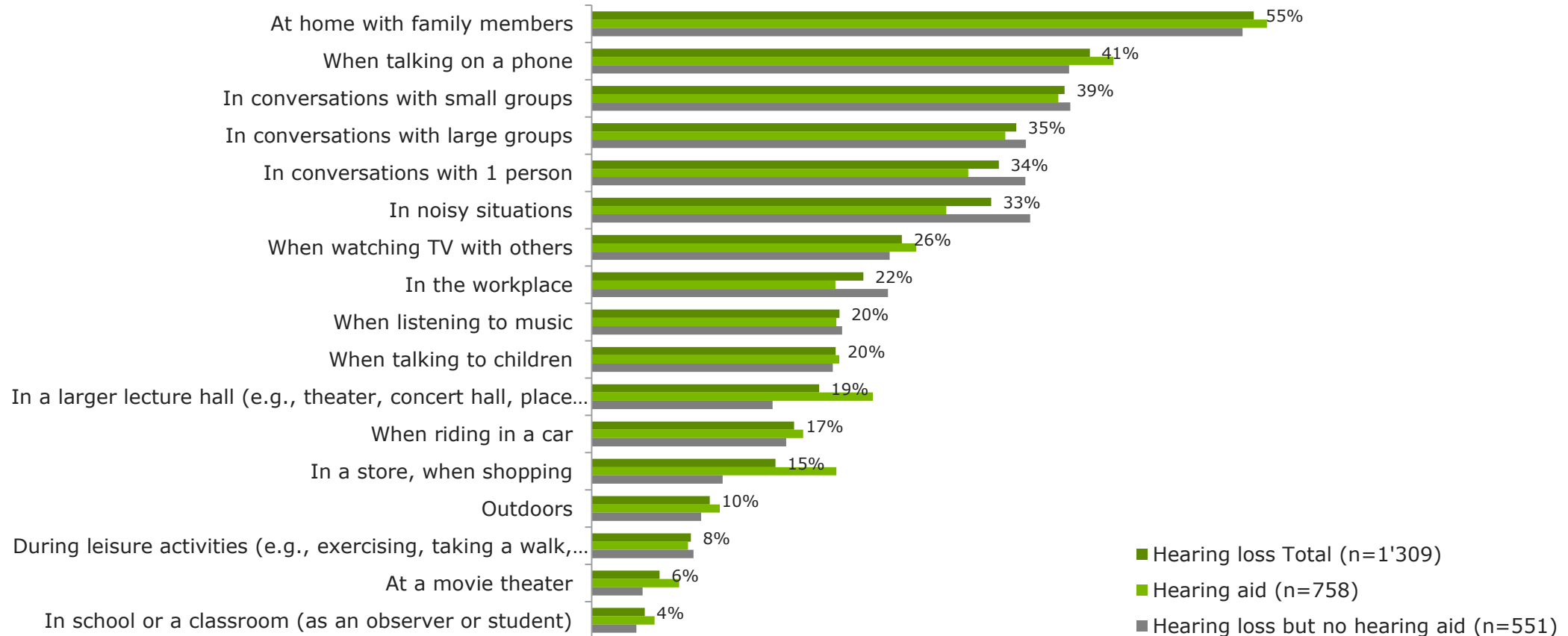
Factors influencing satisfaction with current HA: Sound quality/signal processing and reliability are most important for overall satisfaction with HA



*The Influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction, 1 means a maximal relationship. **Read:** Reliability is the most important criteria for satisfaction.

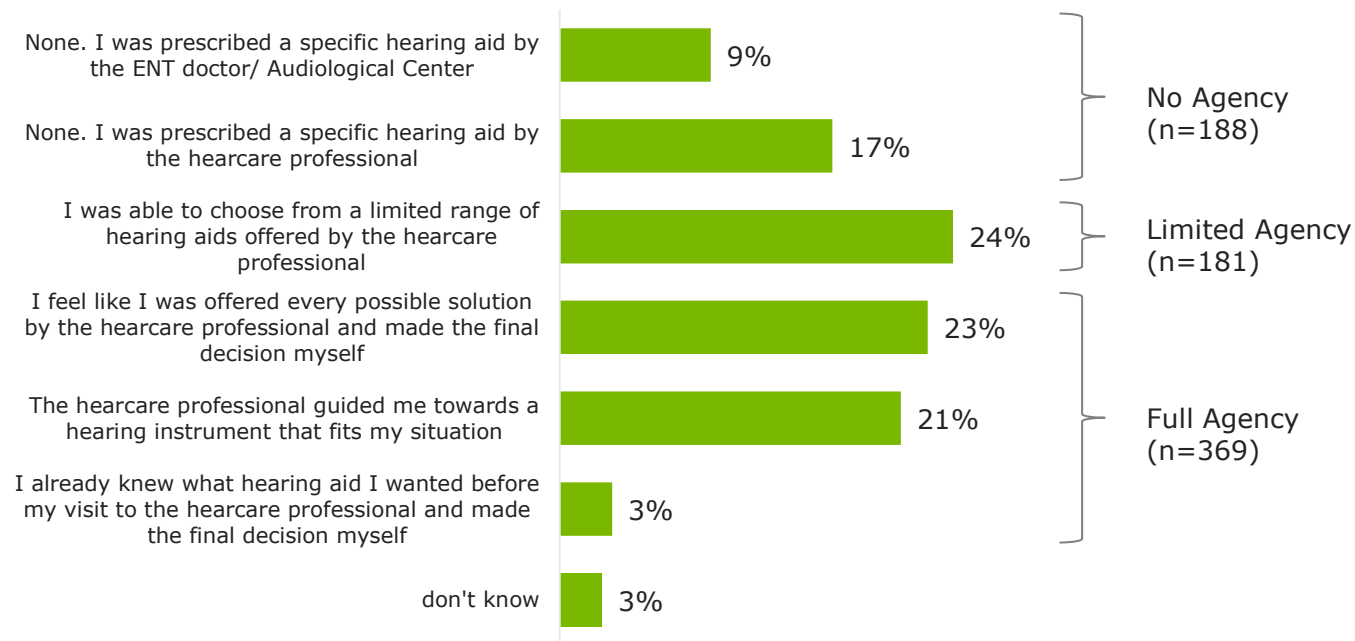
Important listening situations

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



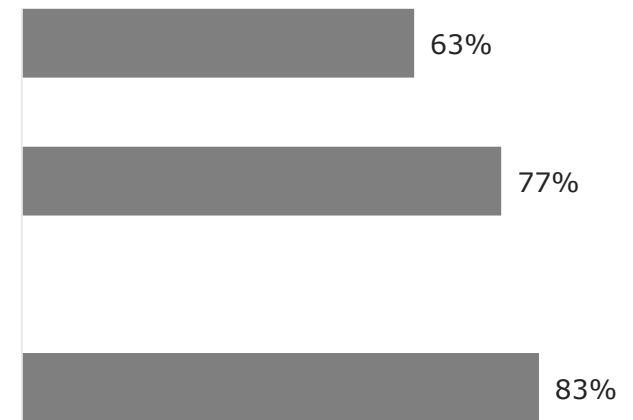
HA owners who experienced a high degree of freedom when choosing the HA, are most satisfied with their device!

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



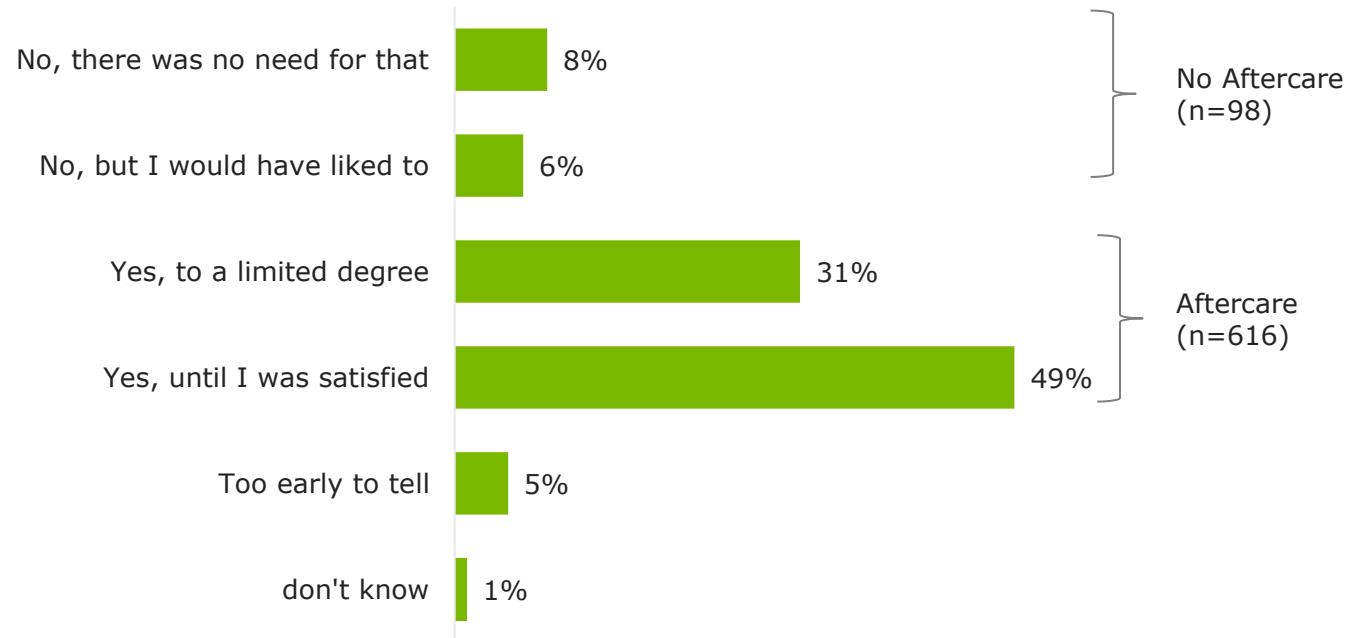
HA-owner, n=758

Overall Satisfaction with HA
% Satisfied



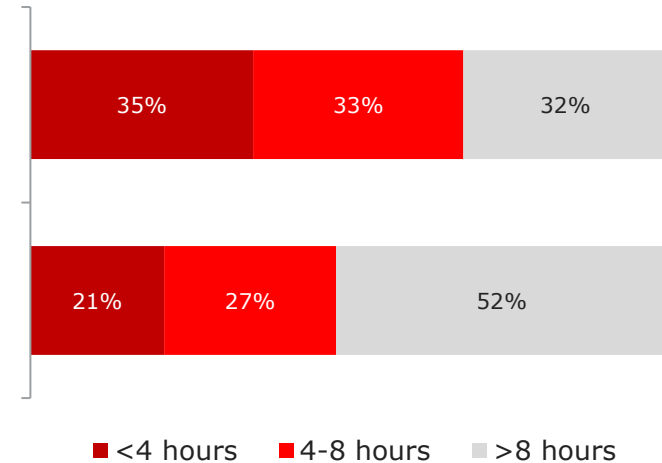
Most HA owners had aftercare for their HAs – those who didn't receive aftercare, wear the HAs for fewer hours per day!

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



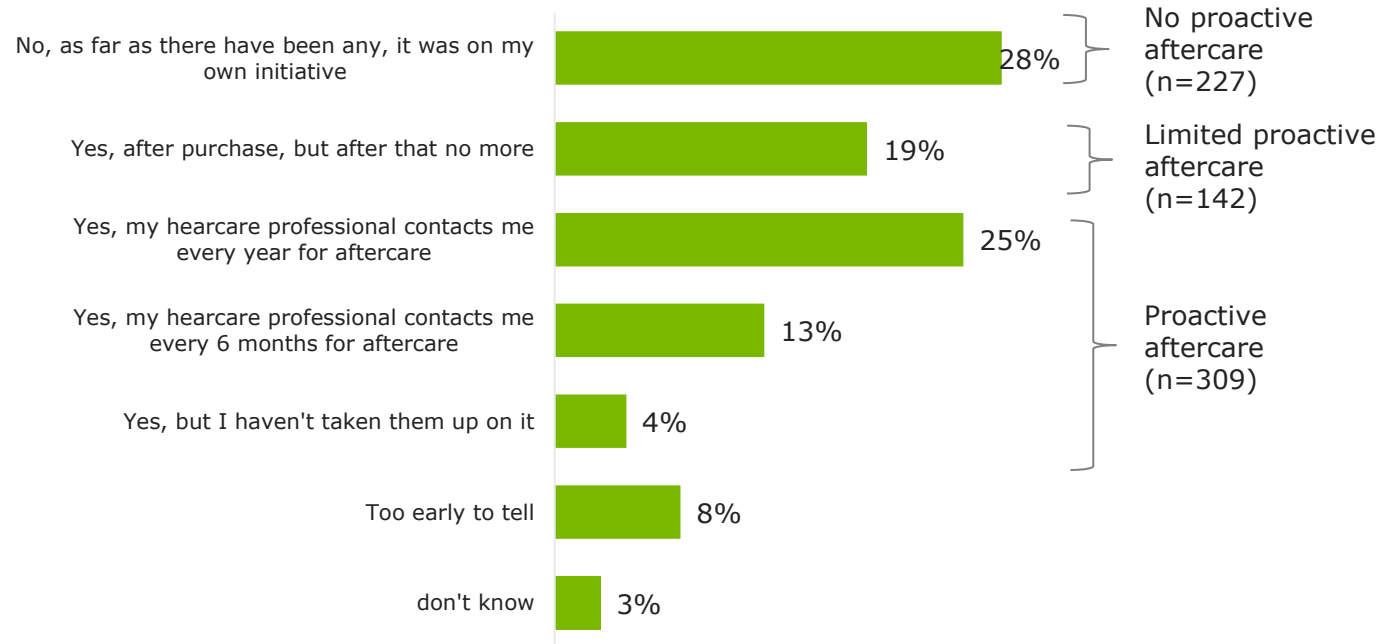
HA-owner, n=758

Hours HA is worn per day



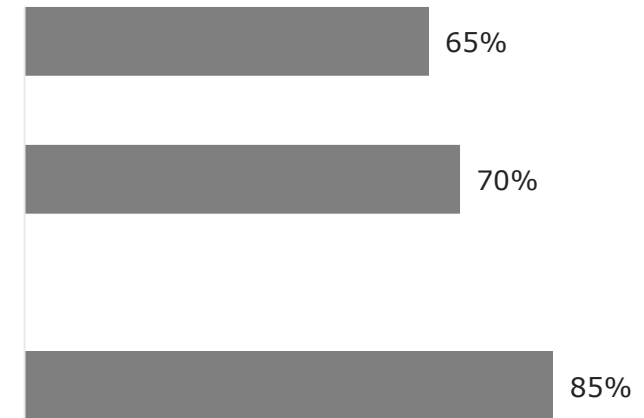
HA owners who are contacted proactively by their hearcare professional, are far more satisfied with their HAs!

Are you contacted proactively by your hearcare professional for aftercare/checkups/evaluation?



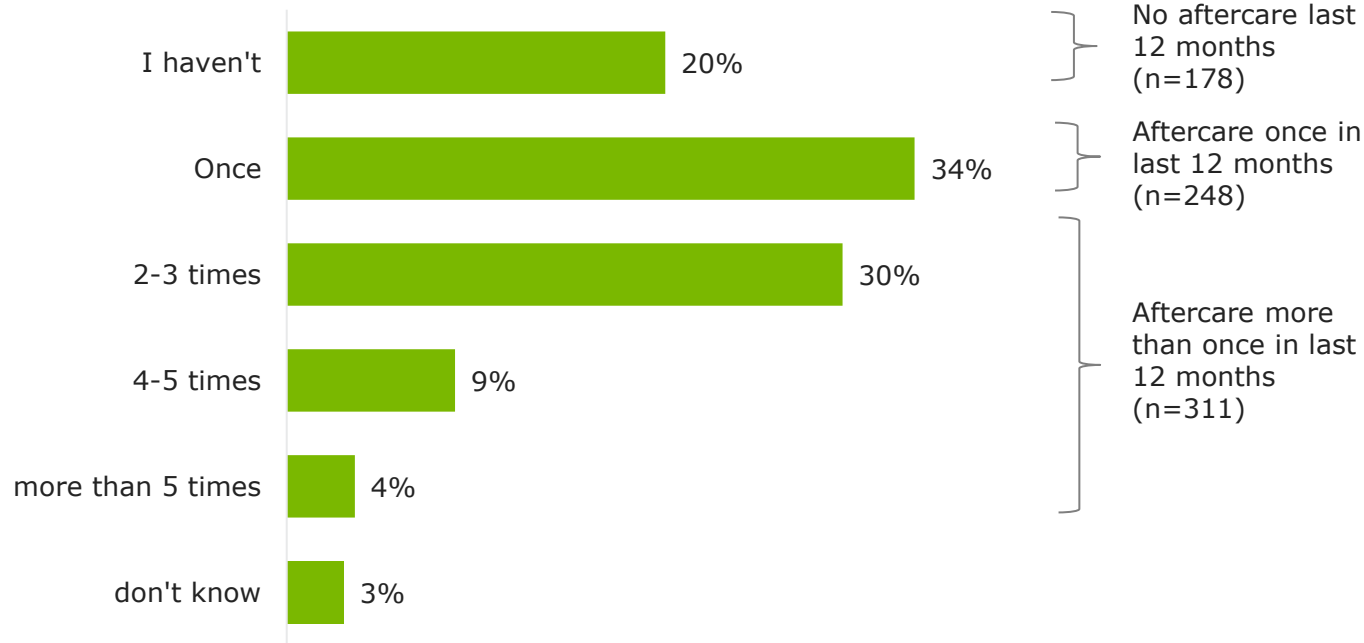
HA-owner, n=758

Overall Satisfaction with HA
% Satisfied



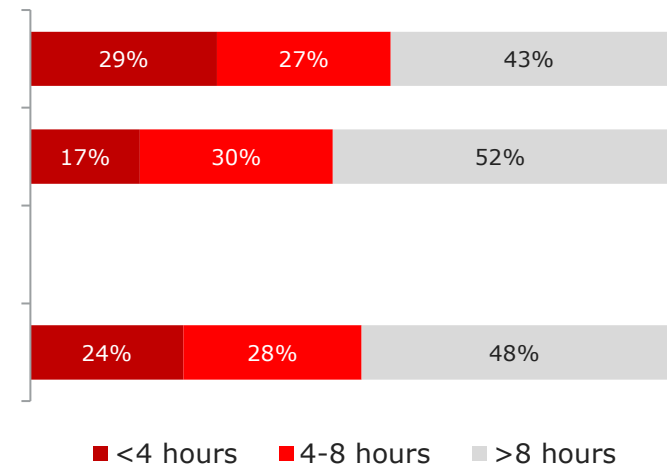
HA owners who didn't see their hearcare professional in the last 12 months, wear the HAs for fewer hours per day.

How many times have you seen your hearcare professional in the past twelve months for aftercare/checkup/service?



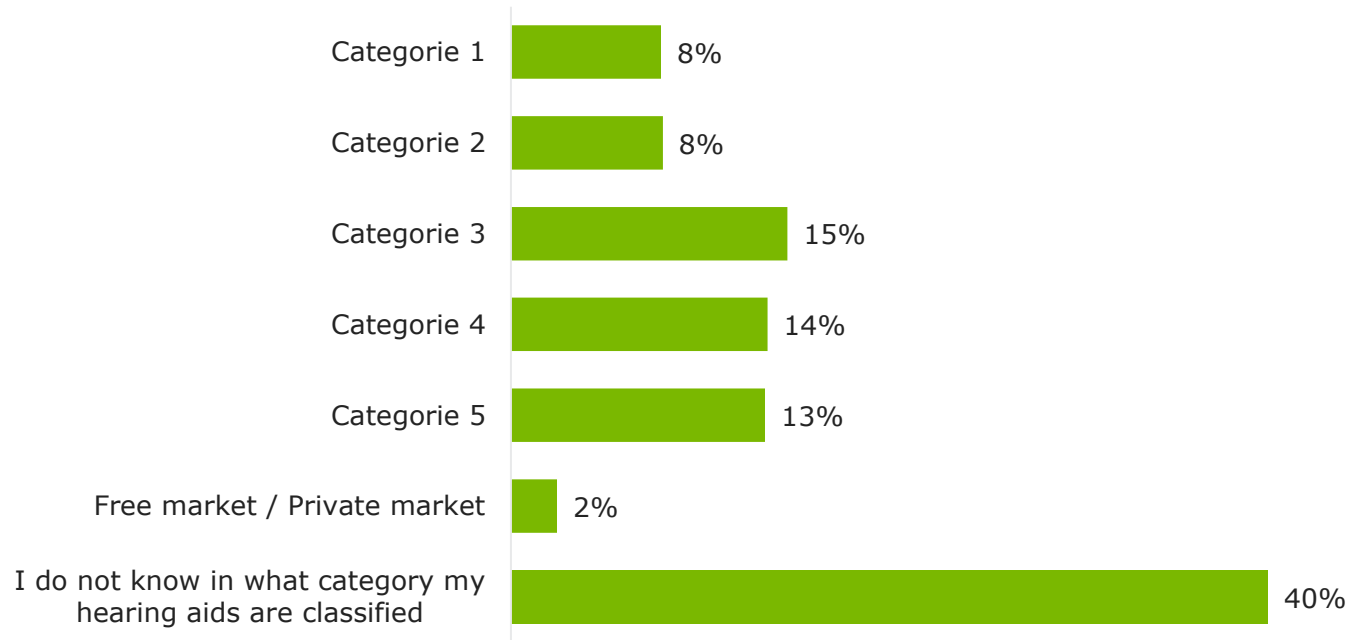
HA-owner, n=758

Hours HA is worn per day



Most HAs were purchased in categories 3-5 – but 40% of the owners don't know in which category their HA falls into.

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



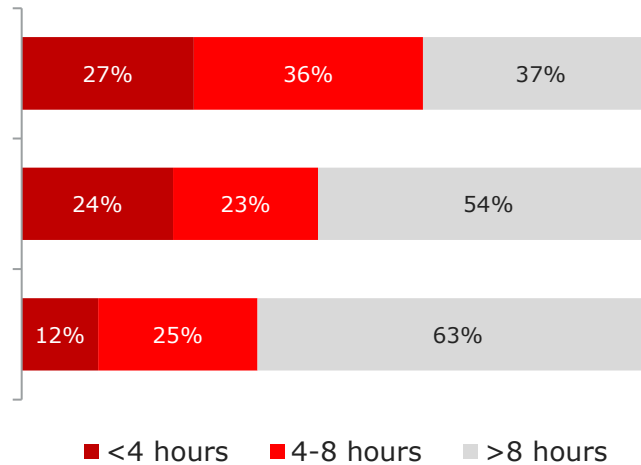
HA-owner, n=758



HA owners with category 1-3 HAs are less satisfied and wear the HAs for fewer hours per day than higher categories/private market.

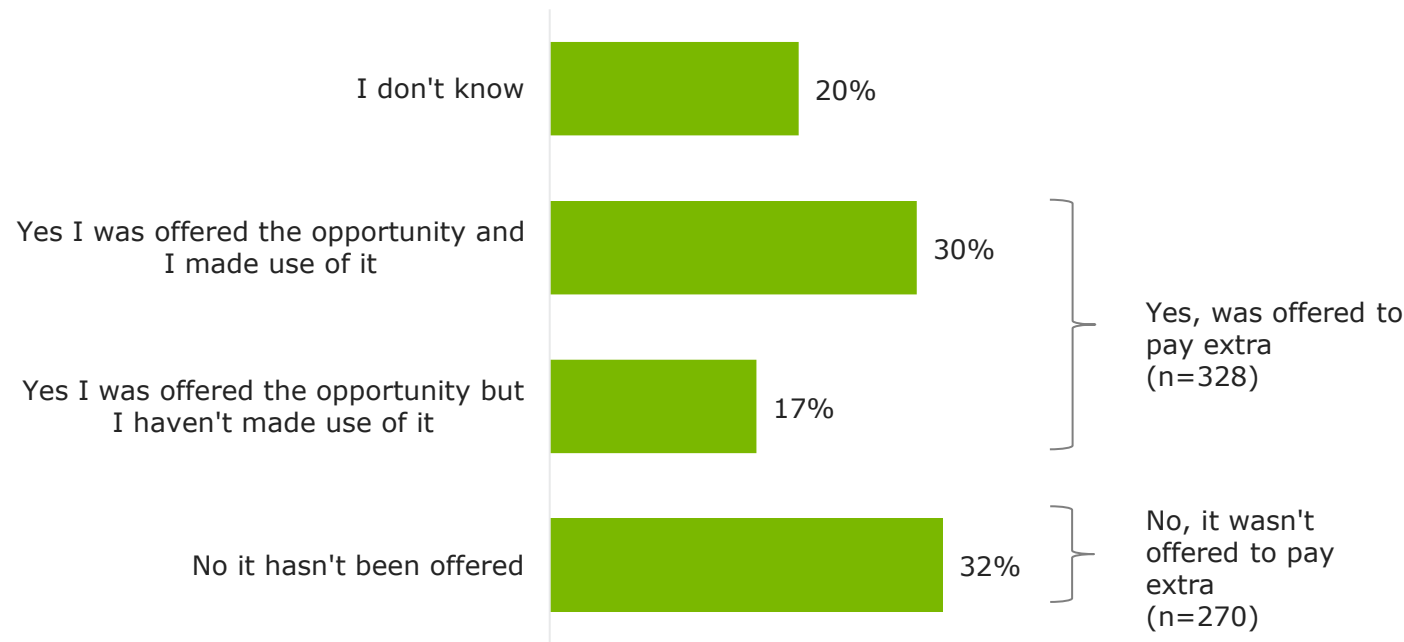
Overall Satisfaction with HA
% Satisfied

Hours HA is worn per day



Around half of the HA owners were offered the option to pay extra for a higher category HA – those who received the offer are slightly more satisfied with the HA.

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. Have you made use of this option?



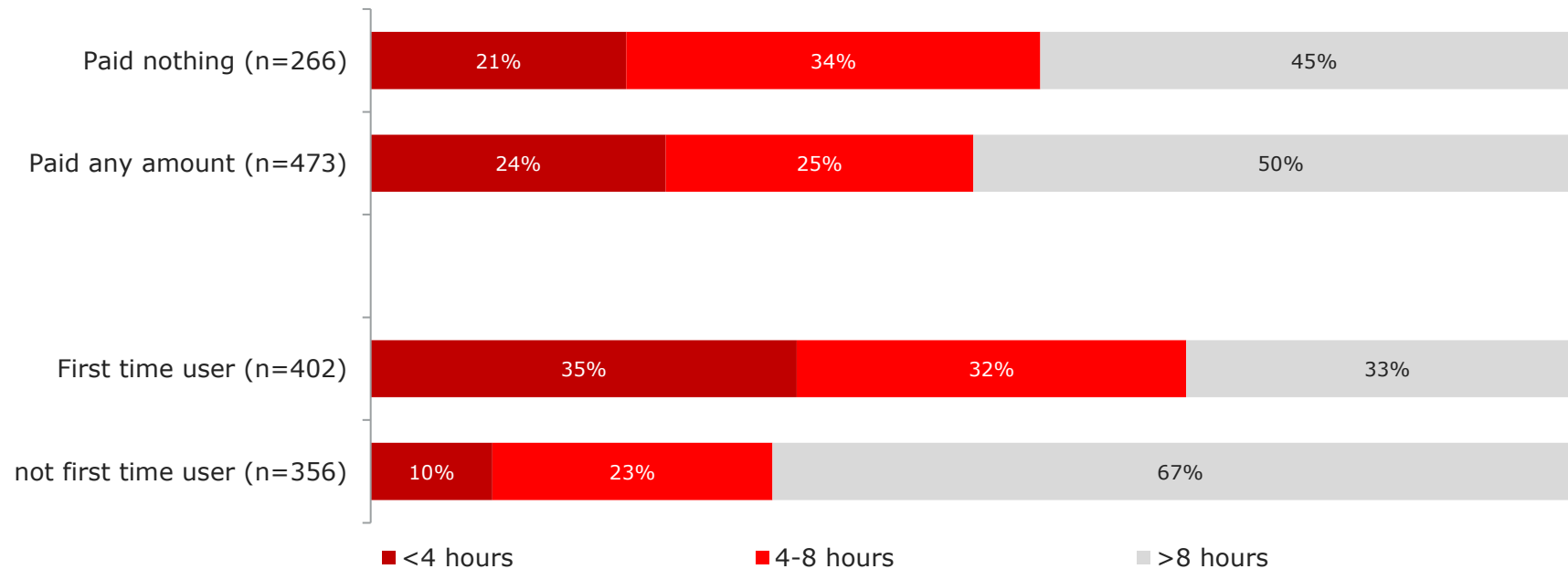
HA-owner, n=758

Overall Satisfaction with HA % Satisfied



Those who paid nothing towards their HAs, wear them for fewer hours than those who paid any amount. First time HA users wear the HA for fewer hours per day than non first time users.

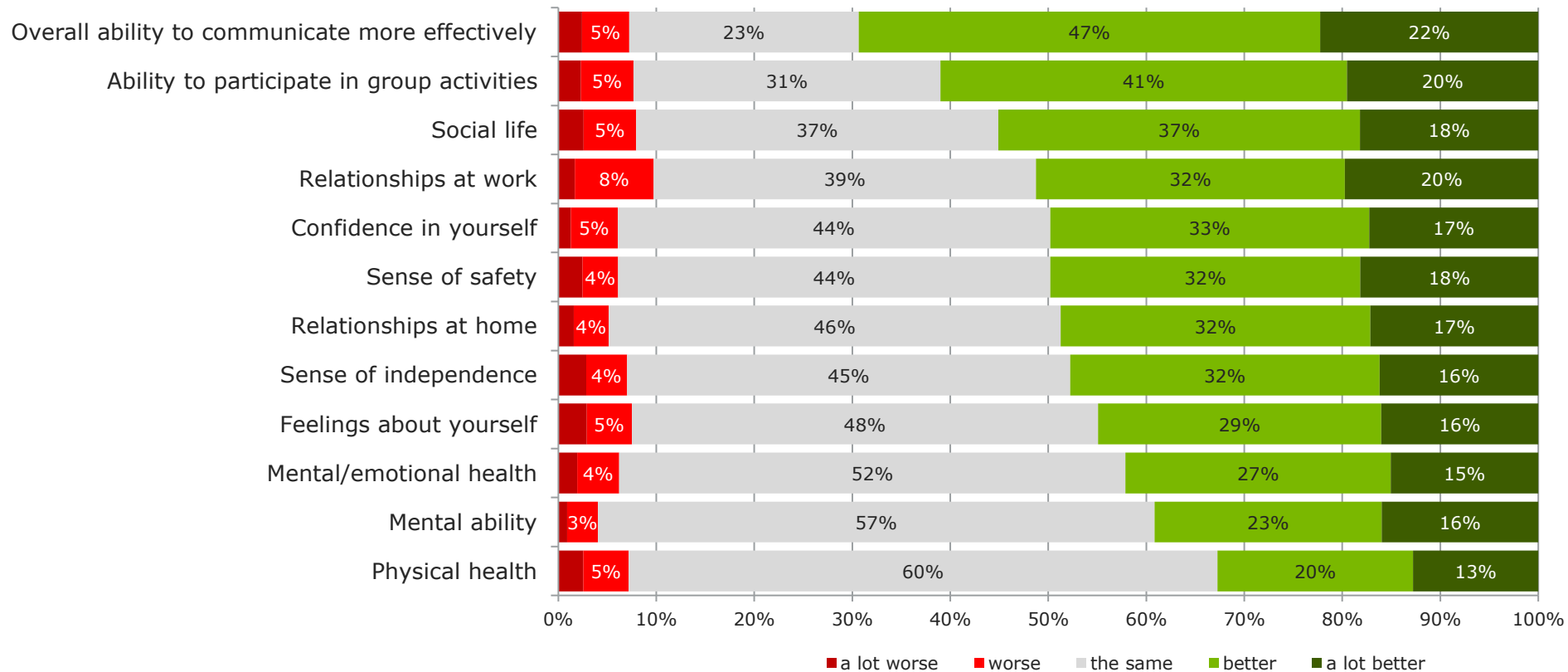
Hours HA is worn per day



Positive impact of hearing aids, quality of life

Significant positive impact of HAs on different aspects: Especially Communication effectiveness, ability to participate in group activities and social life improve with hearing aids.

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

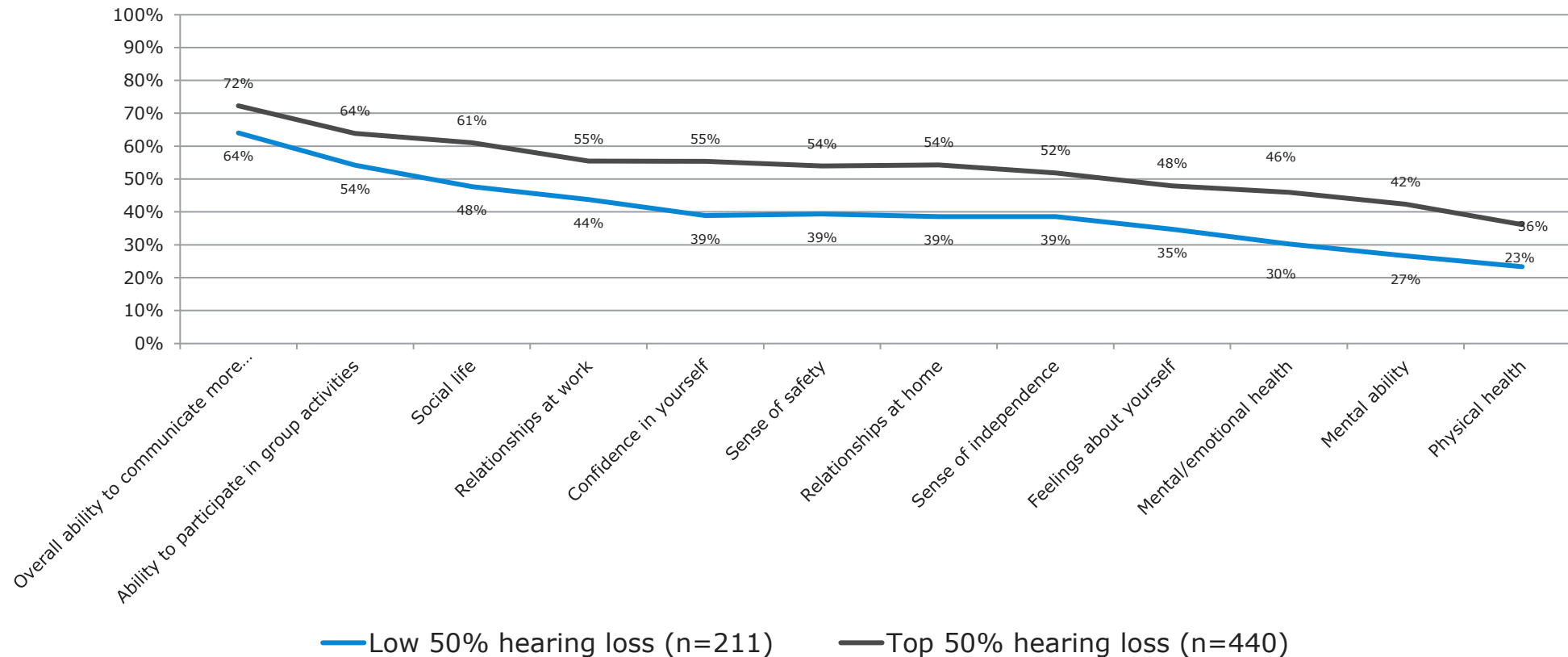


HA-owner, n=758



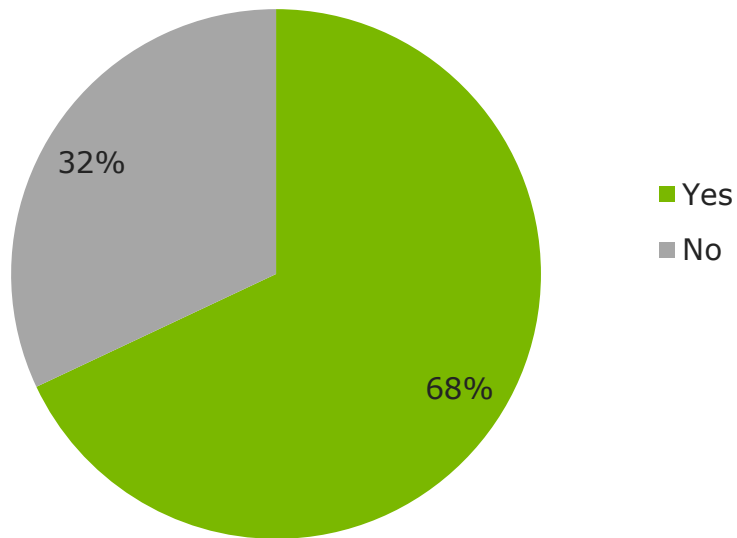
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

% of HA owners feeling better/a lot better



68% of the hearing aid owners feel more confident moving in a city since wearing hearing aids!

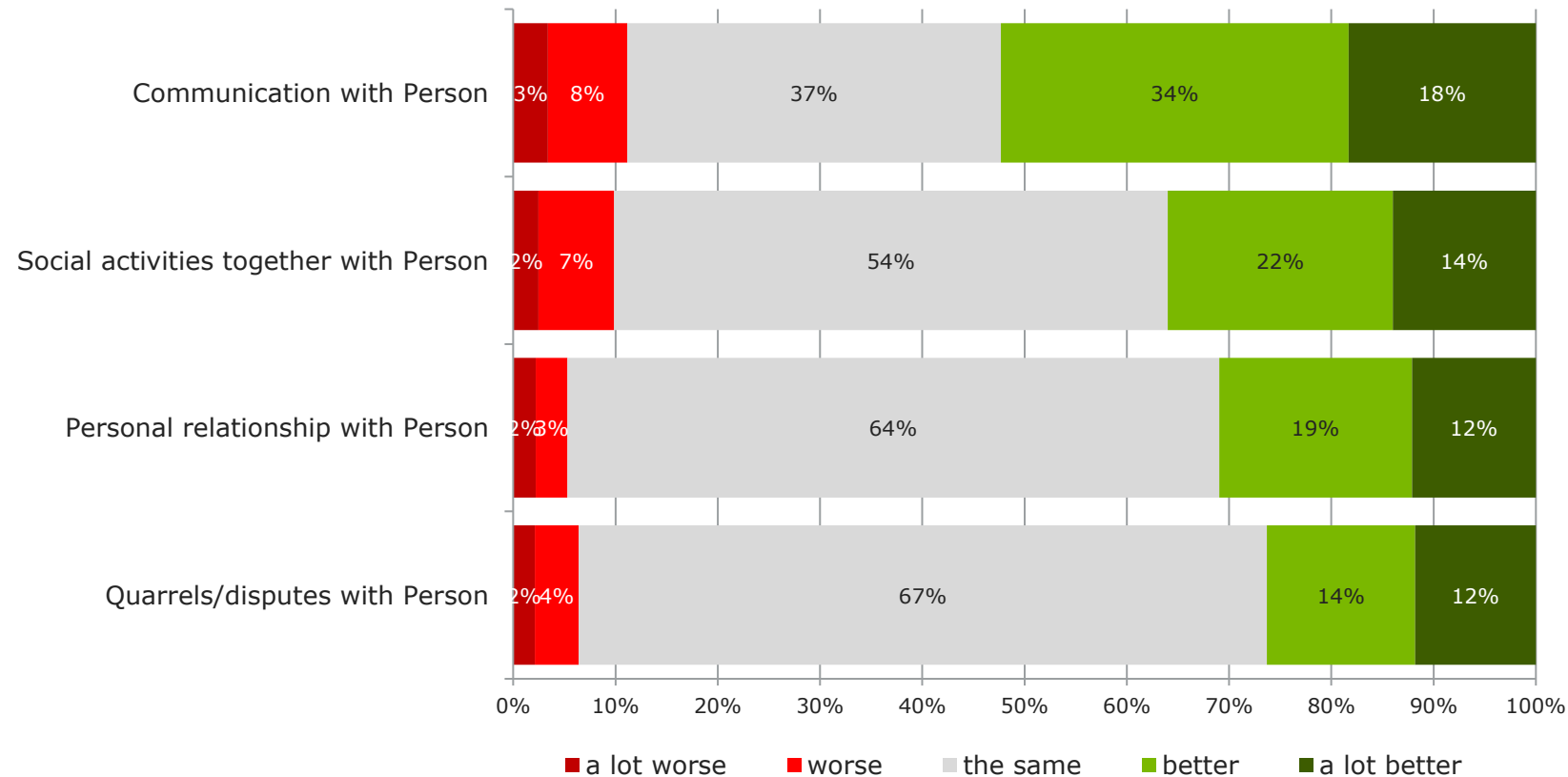
Since wearing a hearing aid, do you feel more confident moving in a city, e.g. because you hear traffic signals/vehicles approaching?



Base: n=758

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

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

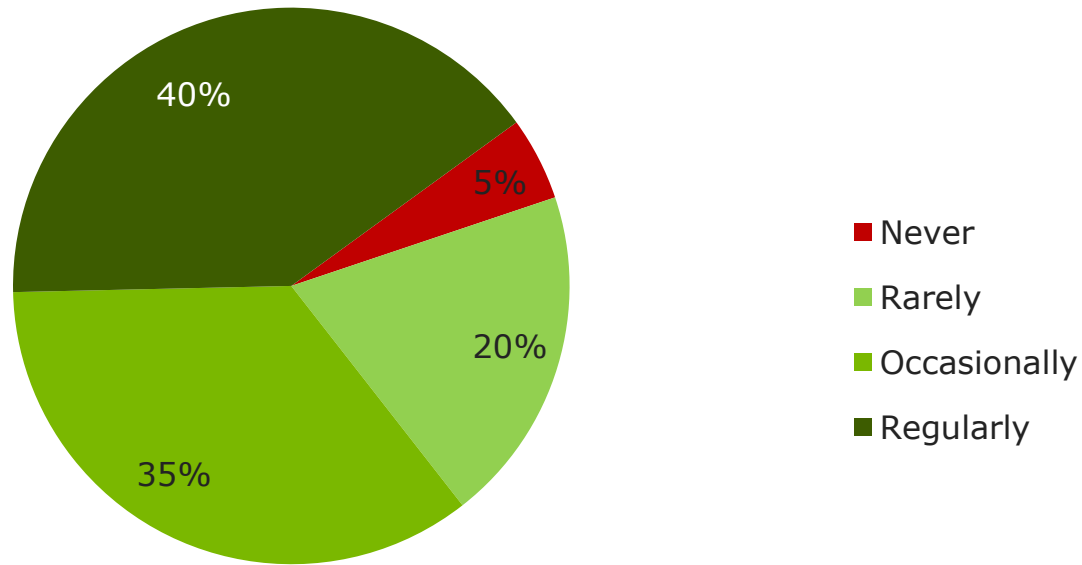


Someone in HH / parent has HA, n=532



95% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

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



Base: n=758

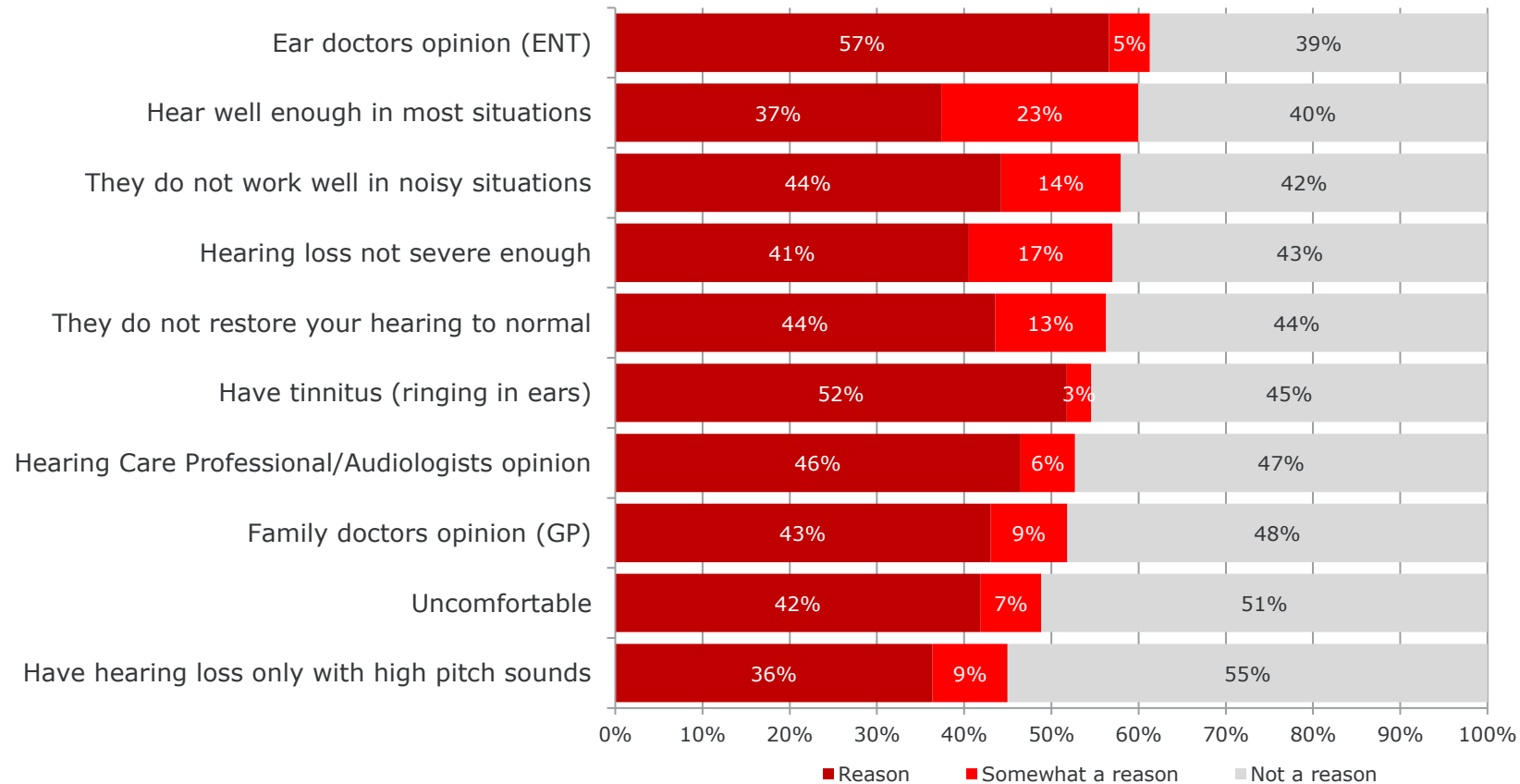
4. Analysis of hearing impaired non-owners

To analyse reasons of non-adoption we look at the Top 50% HL group, as the structure of hearing loss is more similar to that of HA owners

Hearing loss characteristics: Owners compared to non-owners

	HA Owner n=758	HA-Non-owner Low 50% HL n=302	Non-owner Top 50% HL n=144
Ears impaired (stated)			
Unilateral loss	24%	44%	42%
Bilateral loss	76%	56%	58%
		More similar hearing loss-structure	
Perceived loss			
Mild	12%	43%	7%
Moderate	47%	47%	55%
Severe	32%	8%	20%
Profound	9%	2%	18%

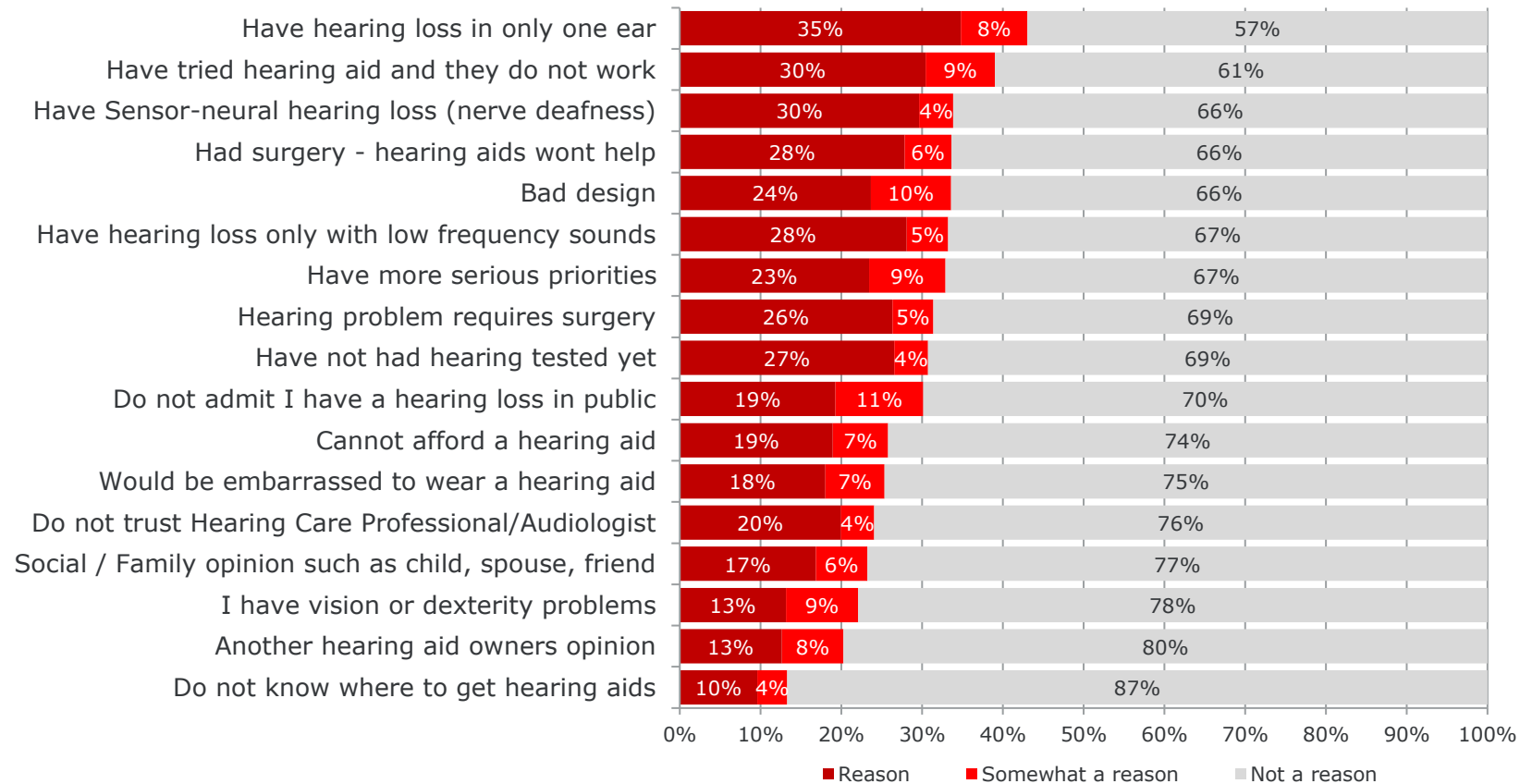
Top 10 reasons for not having a hearing aid (I/II)



Base: non owners Top 50% HL: n=144



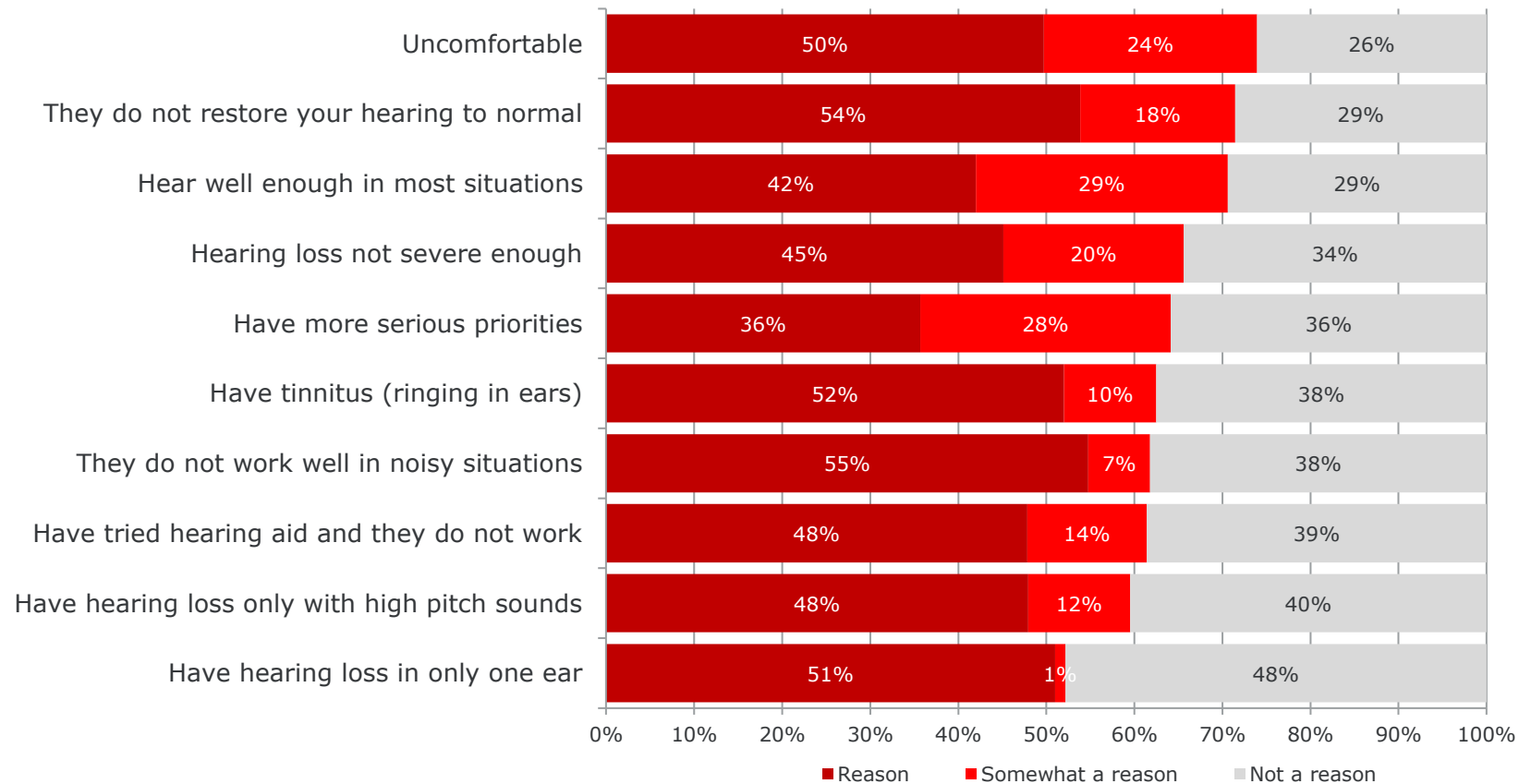
Less important reasons for not having a hearing aid (II/II)



Base: non owners Top 50% HL: n=144



Top 10 reasons for HA owners NOT using them



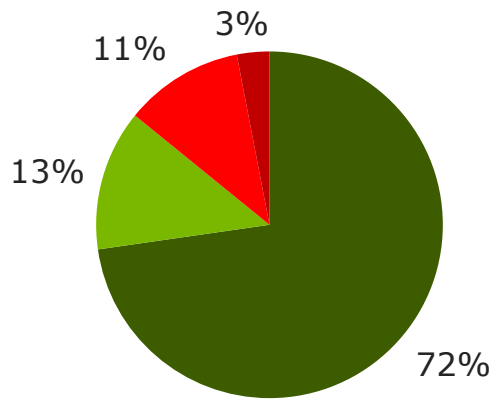
Owners who don't use, n=41 (low sample)



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

72% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.

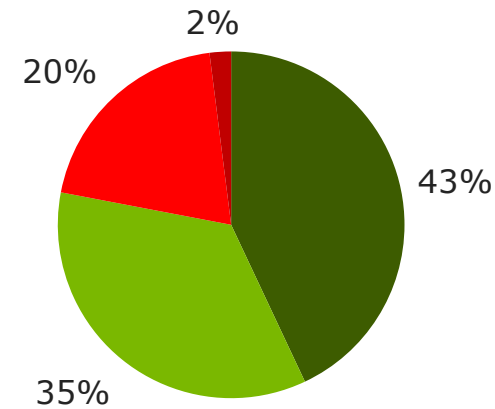
Hearing aid owners:
How often do you feel you are made fun of or rejected because you are wearing a hearing aid?



Base: n=758

Hearing impaired non-owners:
How often do you feel you are made fun of or rejected because your hearing loss?

- Never
- Rarely
- Occasionally
- Regularly



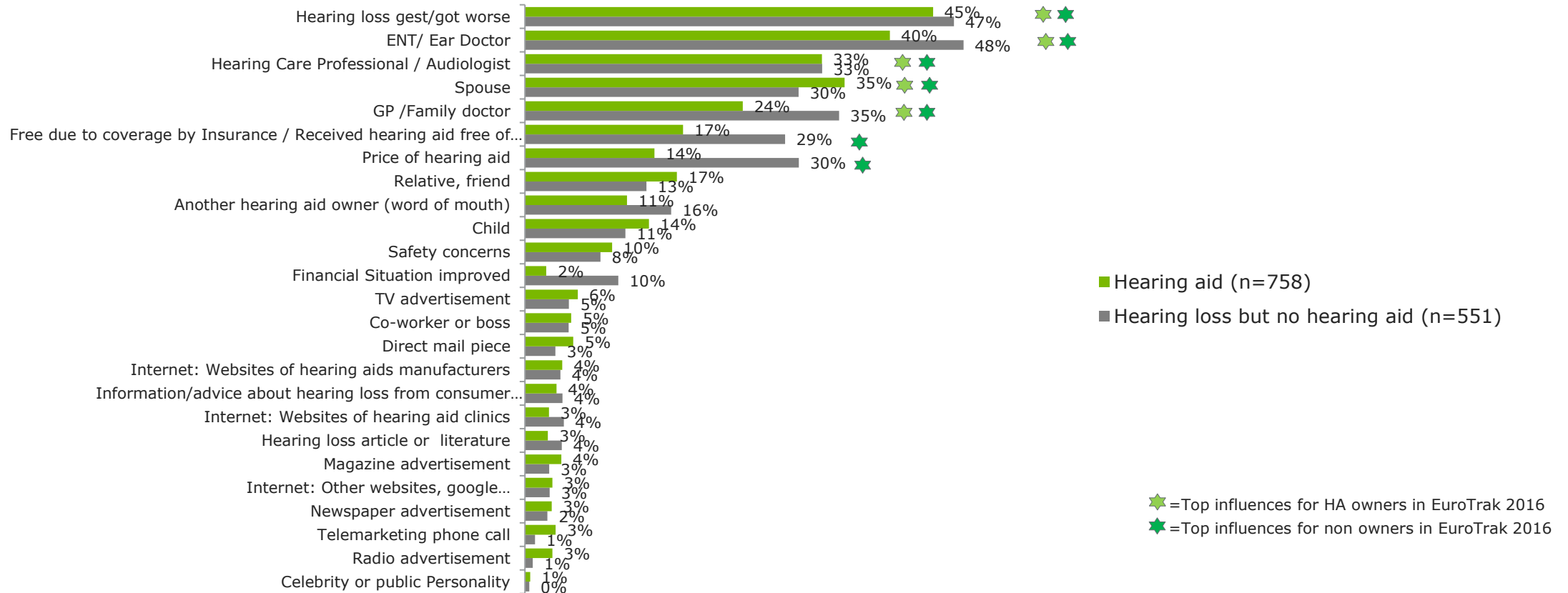
Base: Top 50% hearing loss, no hearing aid n=144

Most important triggers to buy

The most important influencing factors are worsening hearing loss, ENT, audiologist, spouse and GP (+price, insurance coverage for the non owners).

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

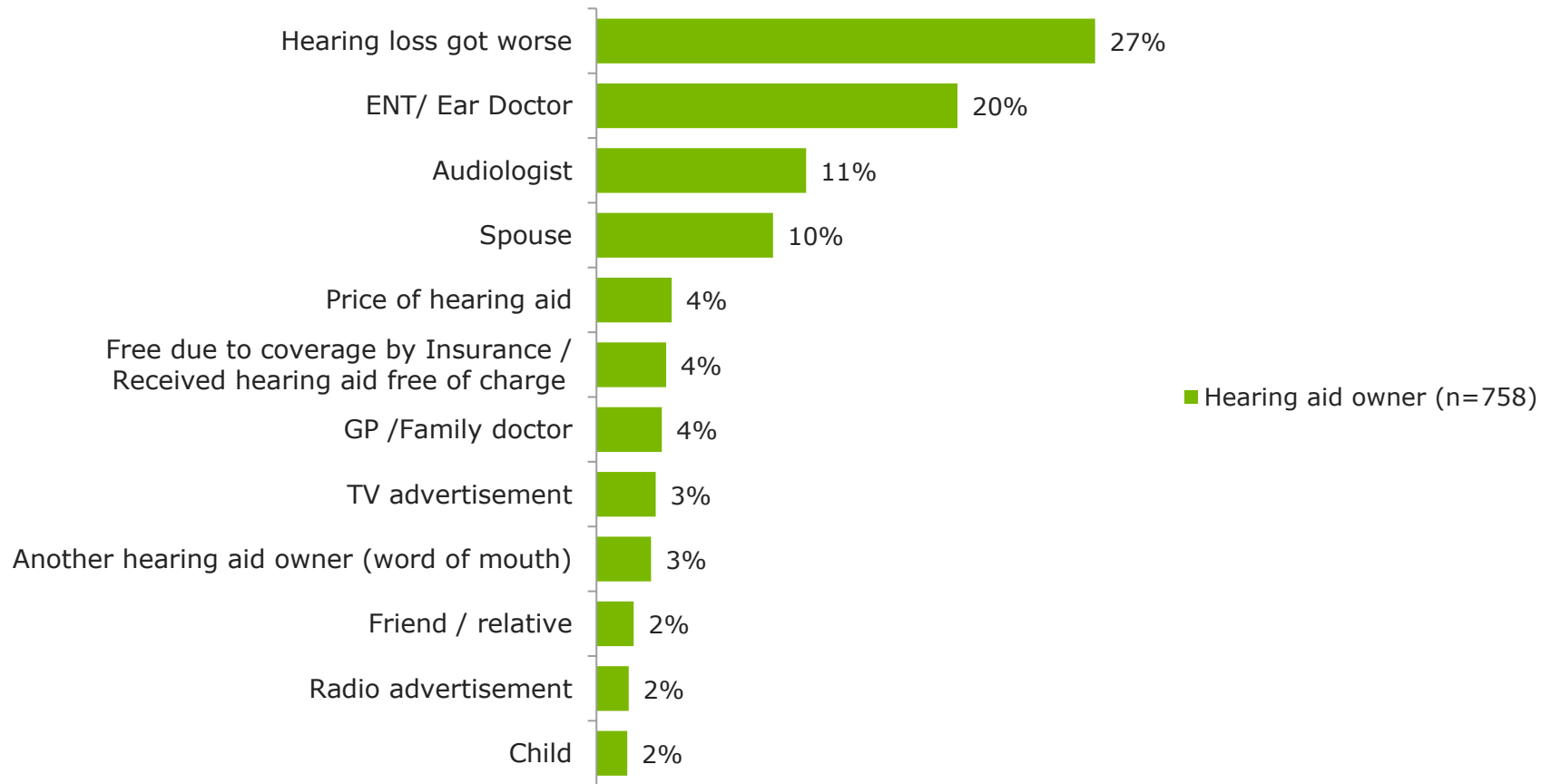
Non-owner: What do you think would influence you to obtain / purchase a hearing aid ?





The most important trigger to buy a hearing aid is worsening hearing loss, followed by ENTs, audiologists and the spouse

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





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Demographics (1) Hearing instrument adoption rates and populations

					Profiles: Categories add to 100%*		
		Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
Gender							
	Male	6'582	10.8%	43.9%	49.1%	52.8%	50.8%
	Female	6'732	9.8%	45.9%	50.9%	47.2%	49.2%
Age							
	1 - 14	2'142	4.0%	36.8%	17.2%	7.1%	5.1%
	15 - 24	1'577	3.5%	41.6%	12.7%	4.3%	3.7%
	25 - 34	1'695	6.0%	49.4%	13.3%	6.8%	8.2%
	35 - 44	1'575	7.6%	43.3%	12.2%	9.0%	8.4%
	45 - 54	1'809	10.2%	23.7%	13.6%	18.5%	7.1%
	55 - 64	1'839	11.6%	40.3%	13.6%	16.9%	14.0%
	65 - 74	1'507	15.0%	49.2%	10.7%	15.2%	18.1%
	74+	1'171	33.1%	56.5%	6.6%	22.3%	35.5%
Type of household							
	single household	1'858	15.9%	52.0%	13.1%	18.8%	25.0%
	Couple, no kids	3'513	13.5%	49.4%	25.5%	31.6%	37.9%
	Couple with kid(s)	5'680	7.0%	37.1%	44.2%	33.1%	24.0%
	Single mom/dad with kid(s)	965	5.5%	32.4%	7.6%	4.7%	2.8%
	Retirement home, hospital etc.	184	29.5%	61.5%	1.1%	2.8%	5.4%
	Other	1'114	8.8%	30.7%	8.5%	9.0%	4.9%

Demographics (2) Hearing instrument adoption rates and populations

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	Profiles: Categories add to 100%*		
				No hearing loss	Hearing loss but no hearing aid	Hearing aid
Status						
The head of the household (alone or together with someone)	6'608	14.2%	48.3%	47.5%	64.1%	73.6%
The spouse of the head of the household	2'907	9.9%	44.7%	21.9%	21.1%	21.0%
Daughter/son of head of household	3'162	2.9%	19.3%	25.7%	9.6%	2.8%
Other person	637	8.6%	29.7%	4.9%	5.1%	2.6%
Employment						
Zelfstandig ondernemer	966	11.0%	49.2%	8.8%	7.7%	9.0%
Werkzaam in loondienst	4'628	7.7%	37.2%	43.8%	31.6%	22.6%
Werkzaam bij de overheid	432	9.0%	38.3%	4.0%	3.4%	2.6%
Arbeidsongeschikt	657	14.8%	33.6%	5.7%	9.2%	5.6%
Werkloos / werkzoekend / bijstand	427	9.4%	42.2%	4.0%	3.3%	2.9%
Gepensioneerd of VUT	2'201	23.7%	54.3%	17.2%	34.0%	48.6%
Studerend / schoolgaand	877	2.3%	11.0%	8.8%	2.6%	0.4%
Huisvrouw / huisman / anders	865	12.4%	45.7%	7.8%	8.3%	8.4%
Education						
Geen onderwijs / basisonderwijs / cursus inburgering / cursus Nederlandse taal	419	19.2%	47.4%	3.5%	6.0%	6.6%
LBO / VBO / VMBO (kader- of beroepsgerichte leerweg) / MBO 1 (assistentenopleiding)	1'356	16.1%	49.6%	11.6%	15.7%	18.6%
MAVO / HAVO of VWO (eerste drie jaar) / VMBO (theoretische of gemengde leerweg) / voortgezet speciaal onderwijs	1'259	13.3%	48.9%	11.2%	12.2%	14.1%
MBO 2, 3, 4 (basisberoeps-, vak-, middenkader of specialistenopleiding) of MBO oude structuur (voor 1998)	3'118	10.4%	41.3%	28.6%	27.1%	22.9%
HAVO of VWO (overgegaan naar de 4e klas)	985	10.8%	44.4%	9.0%	8.4%	8.1%
HBO propedeuse of WO propedeuse / HBO (behalve HBO-master) / WO-kandidaats of WO-bachelor	2'704	9.8%	44.0%	25.0%	21.2%	20.1%
WO-doctoraal of WO	776	8.7%	51.6%	7.3%	4.6%	6.0%
ander	436	12.9%	38.7%	3.9%	4.9%	3.7%

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	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
	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