



Europe is aging – and not hearing it

Sonova media briefing
Paris, 18 September 2026

An ageing continent that only half hears

Europe's hearing loss is growing with its demographics — and adoption has not moved past one in two

1 in 3

Europeans will be **aged 65+** by 2100 — 22% today, 33% by 2100

56m

people in Europe live with **hearing loss** — around **11%** of the population; 20% for 65+

~50%

adoption ceiling — even Europe's best markets treat only about half of those who would benefit

EUR 185bn

estimated **annual cost** of **untreated hearing loss** to the EU

An ageing Europe is creating more need every year, but half the people who could benefit from hearing aids still do not use them.

Sources: EuroTrak 2025 (EHIMA / Anovum); EHIMA / hear-it, "Hearing Loss – Numbers and Costs".

Europe's remaining barrier is stigma, not access

Even Europe's strongest markets reach only about half of the people who could benefit.

What varies by market

- Reimbursement
- Care pathways
- Professional capacity
- Access to testing

What doesn't vary

People still associate hearing loss with ageing, decline and dependence — in every market.

No single player can normalize hearing care alone — it takes industry, professionals, payers and media together.



Sources: EuroTrak 2025 (EHIMA / Anovum); Sonova and Phonak product data.

Market flashlight: France

Pierre Longerna, Managing Director France



Hearing care only works as an ecosystem

Policymakers and payers

The state, Assurance Maladie and the mutuelles set the rules and the cover. After 100% Santé, French adoption rose from 34% in 2015 to 55% today. But cover only works when people know it exists — many still assume a hearing aid is out of reach.



Doctors: ENT and GP

Hearing care starts with the physician, but often also stops there. 67% of French users were recommended a device by an ENT or family doctor — and 18% of those still end up without one. Many don't know about reimbursement schemes.



Audiologists

They fit the device and follow up over years. France's dense network of audioprothésistes is a main reason French users are the most satisfied in Europe — and the shorter the path from test to trial to fitting, the fewer people give up along it.



Industry

Address stigma through design, wearability and technology, so devices are what people want to wear. And prevent hearing loss with hearing protection at work and in leisure.



Media and society

Normalize hearing aids the way glasses were normalized. Only a third of French people have had a hearing test in the past five years, and far too few know that the cost is largely covered.

Hearing care is an investment, not a cost.

Acting early protects participation in society, keeps people in work and helps avoid later illness. Hearing loss is the largest modifiable risk factor for dementia (Lancet Commission, 2024), and WHO guidance of July 2026 now includes hearing aids in dementia risk reduction. Screening, protection and early treatment are a shared ecosystem responsibility.

Sources: EuroTrak 2025 France (SNITEM / EHIMA / Anovum); SNITEM on 100% Santé; Lancet Commission on dementia prevention, intervention and care, 2024; WHO dementia risk-reduction guidance, July 2026.

France: what strong reimbursement changes

Europe's adoption champion — and proof that when the financial barrier falls, people act

55%

adoption among people with self-declared hearing loss — the highest in Europe, up from 34% in 2015

100% Santé

SNITEM attributes the historic rise to full reimbursement: the higher the rate, the higher the adoption

83%

of French users are satisfied with their hearing aids, against 80% for the rest of Europe

97%

say their hearing aids improved their quality of life, against 70% for the rest of Europe

33%

had a hearing test in the past five years — access is only half the story

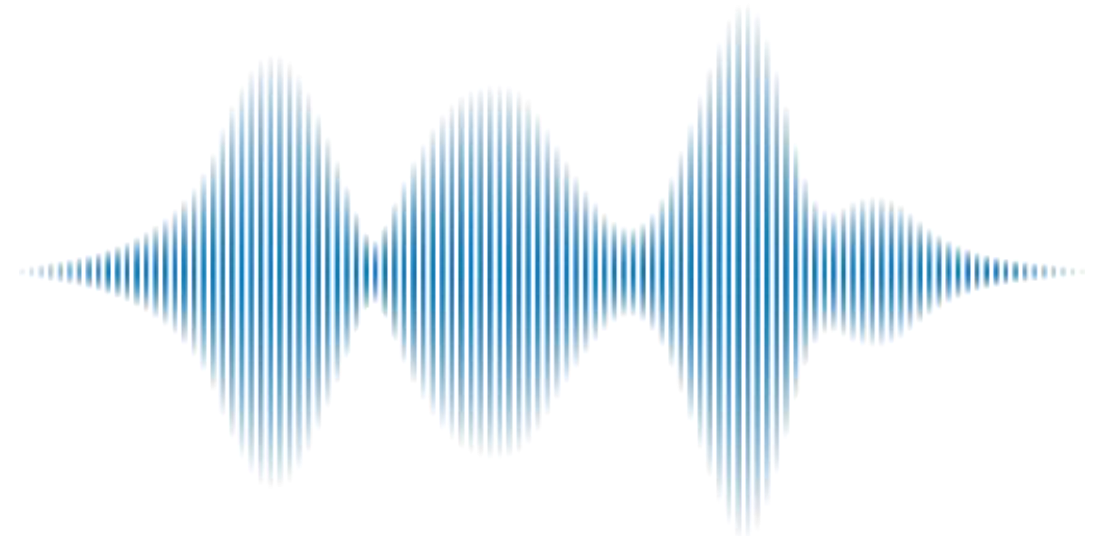
45%

of employed users say their devices enable them to work longer

Source: EuroTrak 2025 France (SNITEM / EHIMA / Anovum).

Market flashlight: Germany

Cristina Cantarell, Managing Director Wholesale Germany



Germany: hearing care keeps people at work

Established reimbursement and strong professional infrastructure — and still only every second person acts

47%

adoption among people with self-declared hearing loss, up from 41.1% in 2022

9m

people in Germany report hearing loss — 10.9% of the population, 12.6% of adults

43%

had a hearing test in the past five years; 74% of owners are fitted in both ears

21%

drop-out: one in five recommended a hearing aid by a doctor still ends up without one

EUR 32.6bn

annual cost of dementia to German households — cutting it by 1% would be EUR 326 million a year

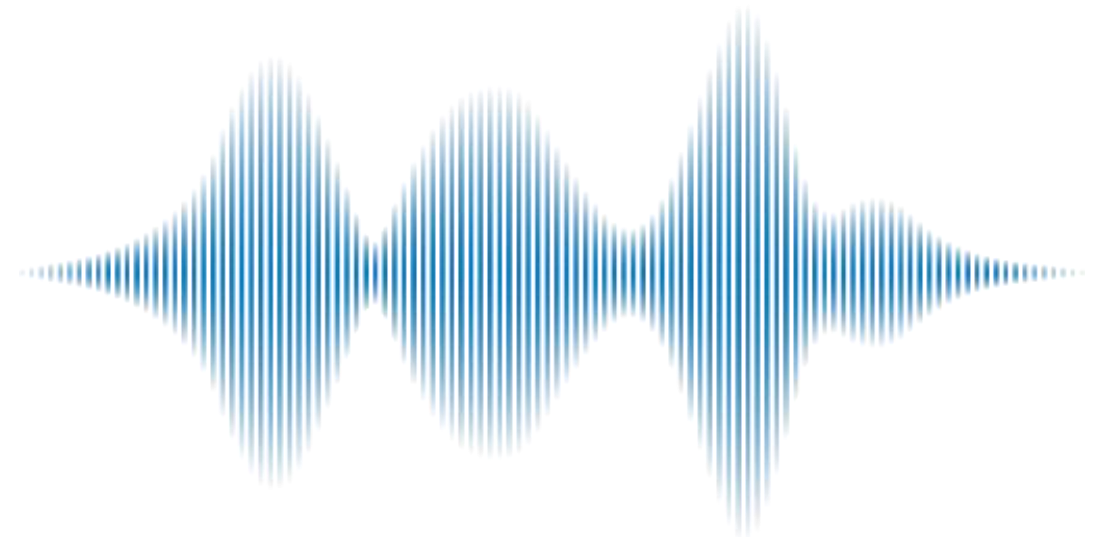
55%

of employed users say their hearing aids let them work longer

Sources: EuroTrak 2025 Germany (BVHI / EHIMA / Anovum); economic cost of dementia in European panel-study cohorts.

Market flashlight: United Kingdom

Karen Gallagher, Managing Director Wholesale UK and Ireland



The United Kingdom: not a challenge of innovation, but adoption

The economic burden of untreated hearing loss is far greater than the cost of addressing it

Adoption challenge

- Huge unmet need: **2 million people use hearing aids whilst 7 million could benefit**
- Adoption among people with hearing loss is **50.5%**, down from **52.8% in 2022**
- Technology has advanced dramatically yet adoption has sat near one in two for more than 15 years

Economic impact

- Hearing loss is estimated to cost the UK economy **£25–30 billion a year** in lost productivity and unemployment
- **41%** of people retiring early cite hearing loss as a factor in their decision
- Untreated hearing loss is associated with **increased dementia risk**, making early intervention vital
- Dementia costs the UK approximately **£42 billion per year (2024)**, projected to rise to **£90 billion by 2040**

Opportunity

- Acting earlier improves quality of life, supports healthy ageing and delivers real economic benefits

Sources: EuroTrak 2025 United Kingdom (BIHIMA / EHIMA / Anovum) / NHS England – "What Works Guide: Hearing Loss and Employment" / Alzheimer's Society/Carnall Farrar 2024 report

The United Kingdom: record satisfaction, stalled uptake

People are happier than ever with their hearing aids – and fewer of them are getting one

82%

of users are satisfied with their hearing aids, up from 75% in 2022; 96% report a better quality of life

9 hours

average daily wear time, the highest recorded in the UK to date

71%

think they should have got hearing aids sooner

16%

drop out: discussed hearing loss with a doctor and received positive advice to recommend further action

3 in 10

UK users have felt mocked or rejected because of their hearing aids

1 in 3

employed users say their devices enable them to work longer

Source: EuroTrak 2025 United Kingdom (BIHIMA / EHIMA / Anovum).

What the markets tell us

Three countries, three realities, one pattern that repeats across Europe

The adoption ceiling is real

Even Europe's best-performing markets sit at 50-55% adoption. Every second person who needs a hearing aid still does not have one.

Reimbursement moves the needle

France shows what reimbursement changes. The higher the rate, the higher the adoption — and satisfaction follows.

Few get tested, fewer know help is covered

Only a third have had a hearing test in the past five years, and too few know that hearing aids are reimbursed. People need to hear more about both.

Stigma is the constant — and it is about age

Hearing aids are still seen to make you look old. The industry has an important role to play, with new design, ease of wear and technology that normalize wearing hearing aids the way glasses were normalized.

Sources: EuroTrak 2025 France, Germany and the United Kingdom (EHIMA / Anovum).

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