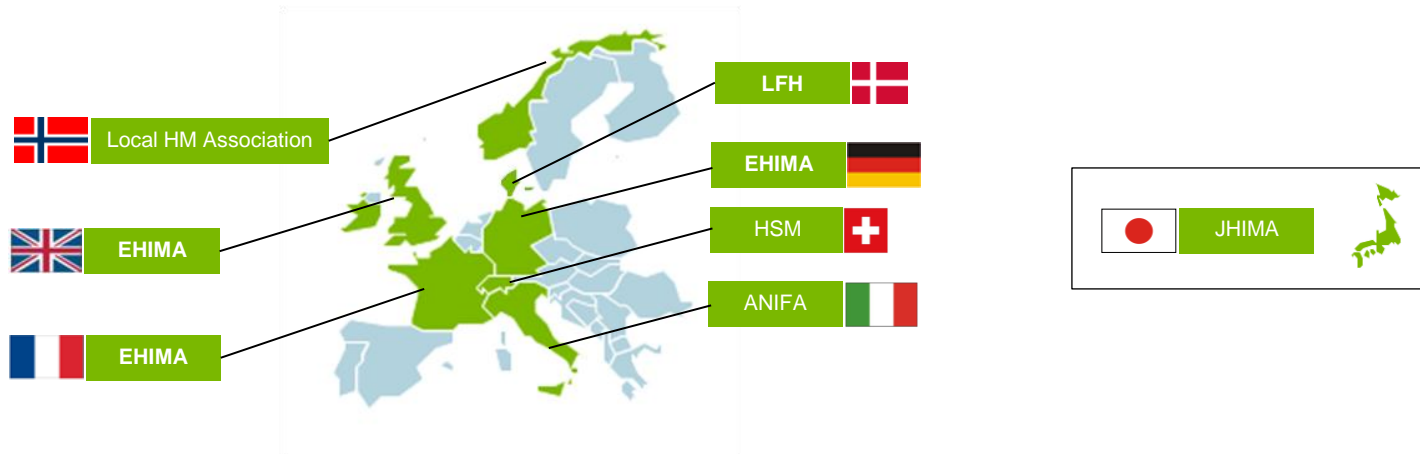


Summary

EuroTrak DENMARK 2012

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

EuroTrak 2012: Eight countries involved



Country	2009	2012	Sponsor
Germany	✓	✓	EHIMA
France	✓	✓	EHIMA
UK	✓	✓	EHIMA
Switzerland		✓	HSM
Norway		✓	HM Association
Italy		✓	ANIFA
Japan		✓	JHIMA
Denmark		✓	LFH

EuroTrak and JapanTrak were developed and executed by Anovum, Zürich

Review EuroTrak 2009/2012

- Trade press: Some covers and 30+ articles
 - Hearing Review / Audio Infos / Hörakustik, etc..

- Conferences/ Stakeholders

- (EUHA, BSHAA, NHS conference, Nordic college, HA wholesalers, Las Vegas, etc...)

- Wide coverage in the news

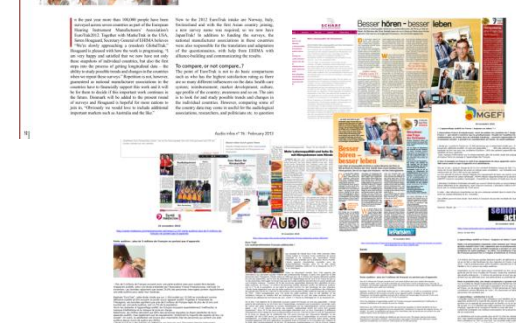
- > 1'000 hits if you google "EHIMA EuroTrak"

- Well received by opinion leaders

- Kochkin/Davies/Strom

- Interest from

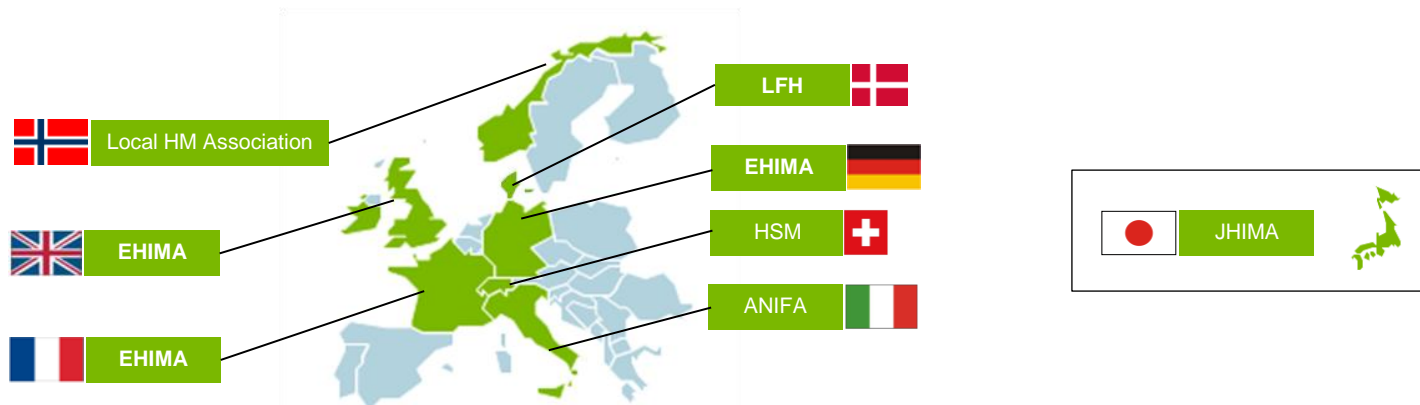
- Australia, Brazil, Spain, Sweden, China, Taiwan, Singapore, Argentina



Summary

1. Introduction

- EuroTrak Denmark 2012 was designed and executed by Anovum (Zurich) on behalf of LFH.
- Sample sizes Denmark 2012:
 - Representative sample (sample 1): n=14'070 people
 - Hearing impaired (sample 2): n=1'320 people
 - Hearing impaired non-owners: n=664 people with hearing loss (**HL**)
 - HA owners: n=656 people with hearing aid (**HA**)
- EuroTrak Denmark 2012 is part of the EuroTrak studies:



Summary

2. Market overview

- Stated hearing loss prevalence
 - Total: 10.0% (18+: 11.9%).
 - Binaural hearing loss: HA owners: 85%, HA non-owners: 58%.
 - Tinnitus prevalence 26% (self stated, sometimes or permanently).
 - Hearing Tests: 38% had a hearing test in the last 5 years.
- Hearing aid adoption rate (HA penetration)
 - Total: 47.8%.
 - Total age group 18+: 50.0 %.
 - 82% of HA owners have binaural treatment.
- The route to the hearing aid
 - 70% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
 - 49% got hearing aids recommended from the ENT or family doctor (drop out rate = 30%).
 - 56% of the GP consultations referred to an ENT. 11% recommended no action.
 - 34% of ENT consultations referred to a audiologist, 37% recommended to get a hearing aid, 33% recommended no action.
- Potential social cost-savings due to the use of hearing aids
 - Hearing aids are believed to have a positive impact on the job.
 - Hearing aid owners have a lower risk of being depressive and forgetful compared to impaired non-owners.

Summary

3. Analysis of hearing aid owners

- Hearing aid ownership and usage
 - 91% received some kind of 3rd party reimbursement.
 - 62% of the currently owned HAs were fitted in 2009 or later.
 - The average age of the currently owned HAs is 4.1 years.
 - The median age of hearing aids before replacement is 4 years.
 - On average, HAs are worn 9.2 hours a day.
 - 40% of hearing aid owners have never heard of wireless technology in connection with hearing aids. 20% rate wireless technology as very important.
- Satisfaction with HAs
 - 70% of the HA owners are satisfied with their HAs.
 - The more hours worn per day, the higher the satisfaction.
 - Satisfaction with HAs bought 2010 or after is higher than with HAs bought before.
 - If HA was purchased at a privat høreapparatbutik, satisfaction with HAs is higher than if it was purchased at an offentlig høreklínik.
- Positive impact of HAs
 - Significant positive impact of HAs on different aspects – especially communication, relationship at home and group activities.

Summary

4. Analysis of hearing impaired non-owners

- Reasons not to own/use HAs
 - Information deficit non-owners: 48% don't know whether any third party would pay, 16% assume no third party would pay (Insurance, Government,...).
 - The main reasons for not using hearing aids are that the hearing loss was not severe enough, they hear well enough in most situations and that they think hearing aids are uncomfortable.
 - In Denmark, costs of hearing aids are not an issue.
 - 13% who own HAs don't use them at all; 20% use them less than one hour/day. Main reasons for this are: "uncomfortable", "hear well enough in most situations" and "HAs do not restore hearing to normal".
- Negative impact of hearing loss and buying intentions
 - Compared to impaired hearing aid non-owners with significant hearing loss (Top 50% hearing loss-group), hearing aid owners feel less exhausted in the evenings.
 - 14% of non-owners intend to get a hearing aid within the next year.
 - The most important influencing factors are worsening hearing loss, significant others plus the fact that it's for free.

Results

EuroTrak Denmark 2012

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

Detailed Results: Roadmap

1. Introduction

- Objectives and organisation
- Field research specification

2. Market overview

- Prevalence of hearing loss and hearing aid adoption rate
- Hearing tests and prevalence of tinnitus
- The route to the hearing aid: Drop-out rates and reasons for drop-outs
- Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms

3. Analysis of hearing aid owners

- Hearing aid ownership, lifetime and usage
- Awareness and importance of wireless technology
- Satisfaction with hearing aids and drivers
- Positive impact of hearing aids

4. Analysis of hearing impaired non-owners

- Reasons for not having a hearing aid
- Negative impact of hearing loss
- Acquiring intentions

5. Appendix

- Demographics: Hearing instrument adoption rates and populations

1. Introduction



Objectives and organisation



Organisation of EuroTrak 2012

Organisation

- Principal of the project EuroTrak Denmark is LFH.
- Anovum Zurich developed the concept of EuroTrak, designed the questionnaire and conducted the fieldwork in cooperation with a panel company. Furthermore Anovum analysed the data and prepared the presentation.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire in cooperation with Sergei Kochkin, Ph.D., Executive Director, Better Hearing Institute.

Use of the data

- LFH 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 LFH use 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 – Denmark/2012/n=[relevant sample size]”
- LFH member companies can ask Anovum to further analyse the raw data in specific ways at their own expense.

Field research specification



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 panellist pools of more than 100'000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n=14'070** 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=664** hearing aid owners and **n=656** hearing impaired non-owners

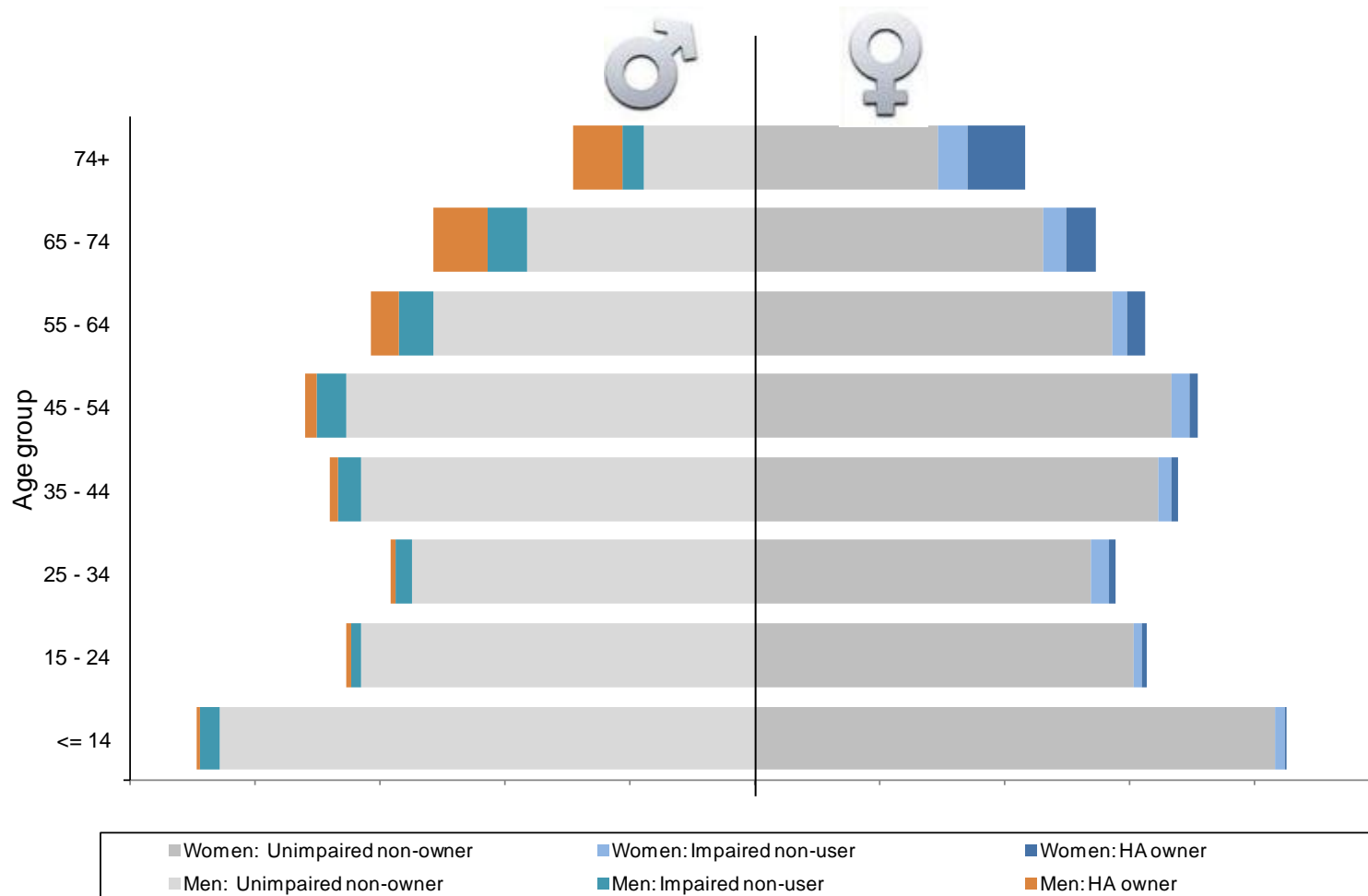
2. Market overview



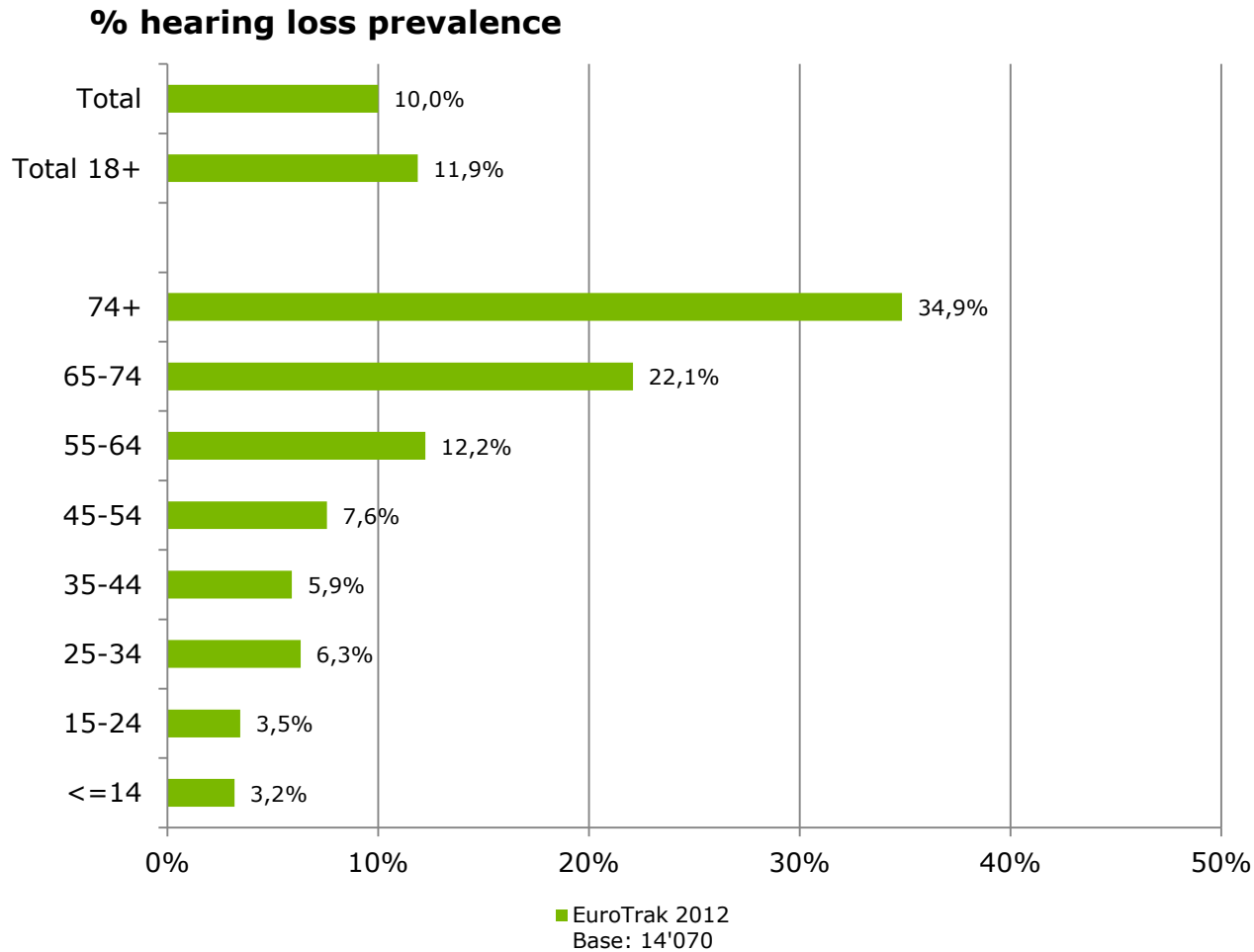
Prevalence of hearing loss and adoption rate



Hearing loss and hearing instrument ownership by gender/age

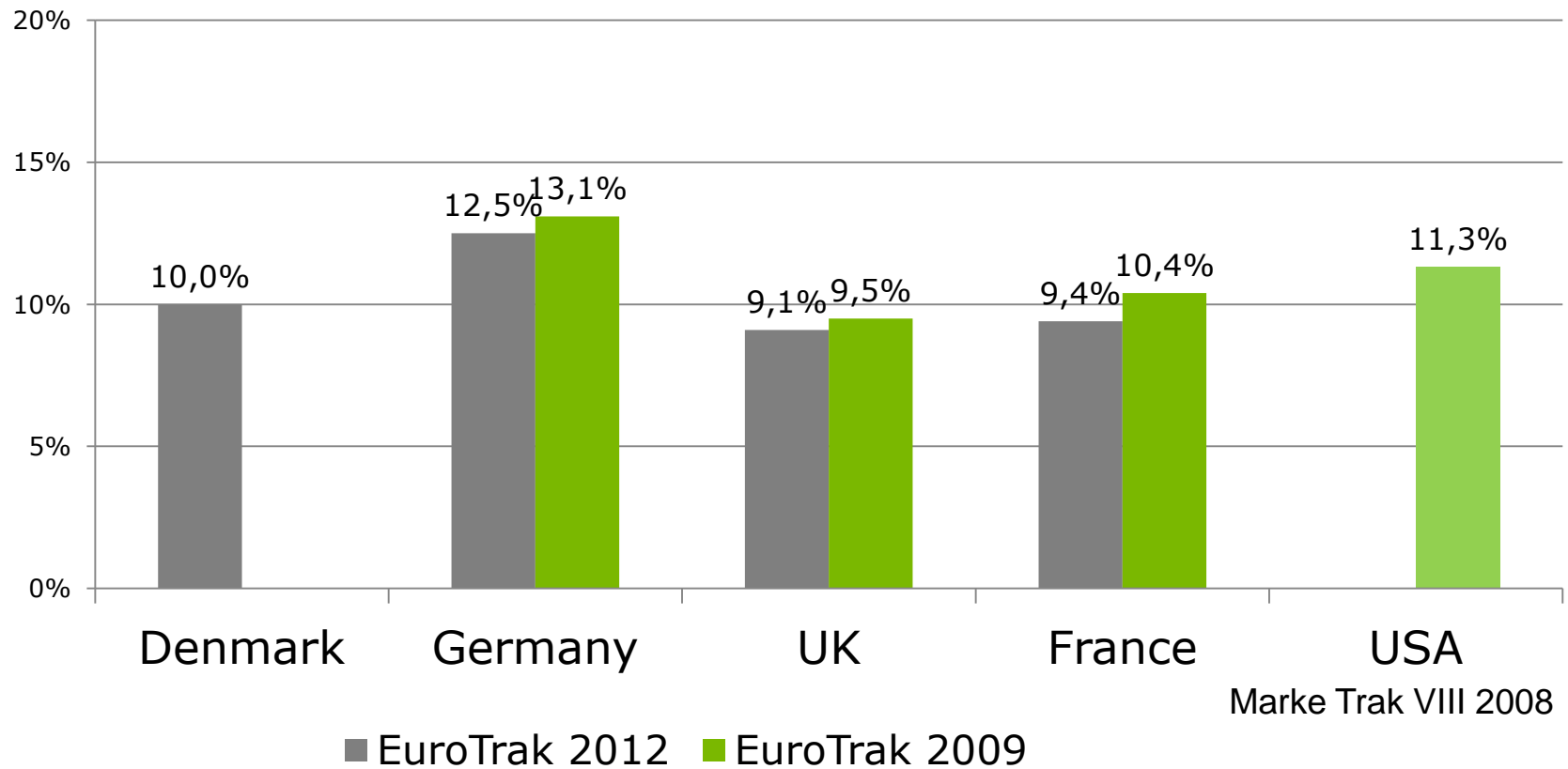


Hearing loss prevalence Denmark 2012



Self-stated hearing loss prevalence in Denmark is similar to UK and France

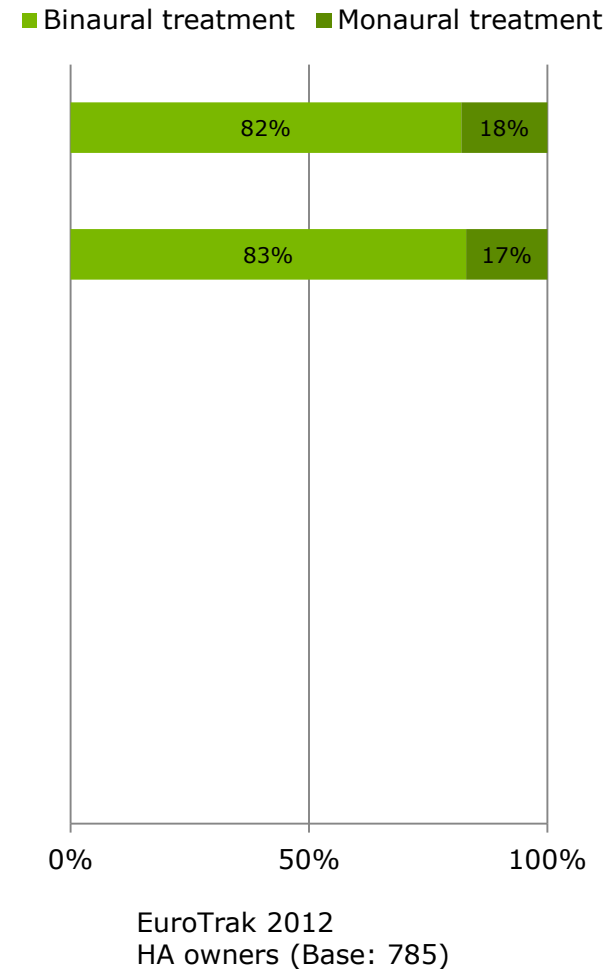
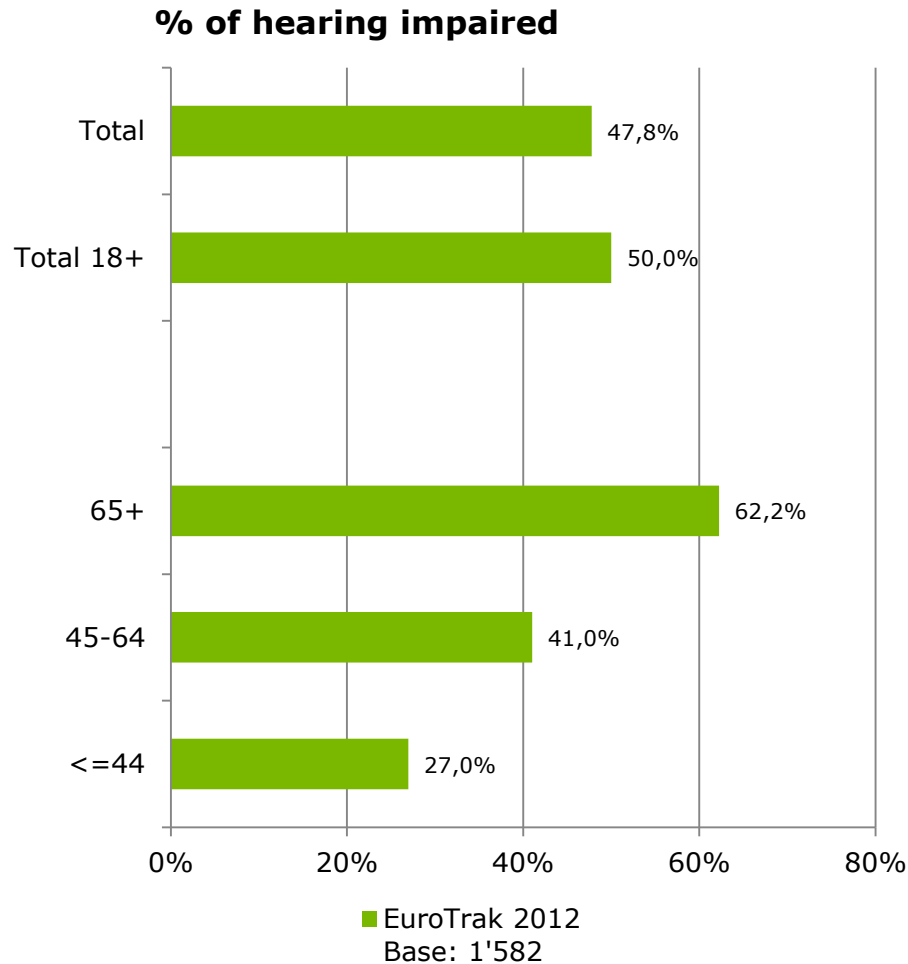
% stated hearing impaired (Base: population)



Marke Trak VIII 2008

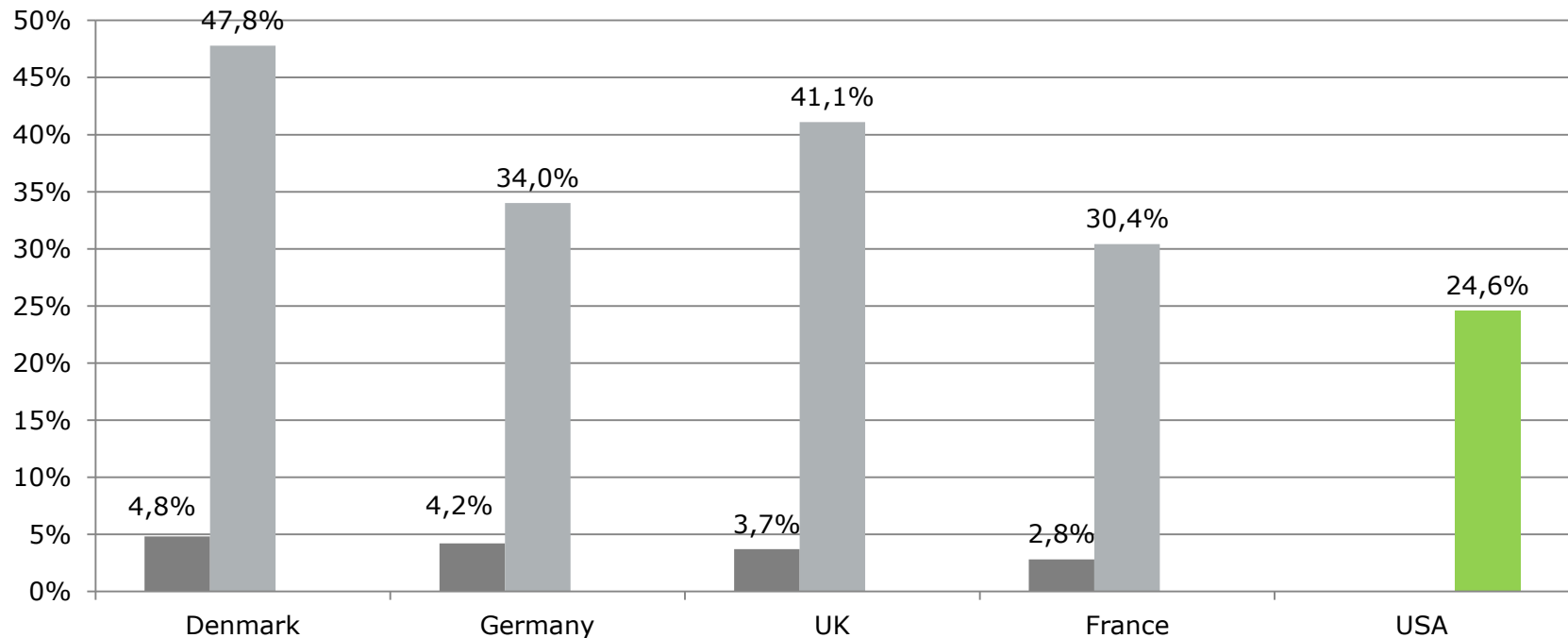
Hearing aid adoption rate Denmark 2012

47.8% of hearing impaired have hearing aid(s), 82% of them have binaural treatment



The proportion of people with hearing aid(s) in Denmark is higher than in Germany, France and UK

Adoption: Proportion of people with hearing aid (% of population) and adoption rate (% of stated impaired)



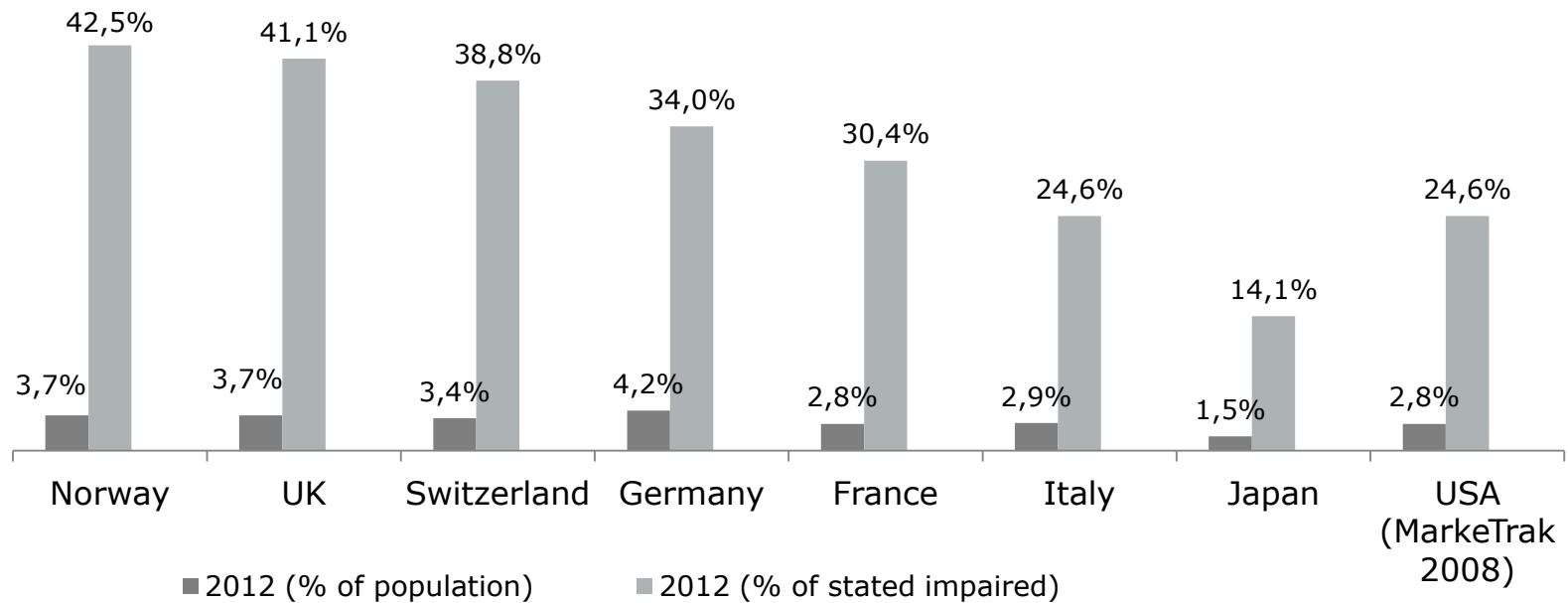
Marke Trak VIII 2008

■ EuroTrak 2012 (% of population) ■ EuroTrak 2012 (% of stated impaired)

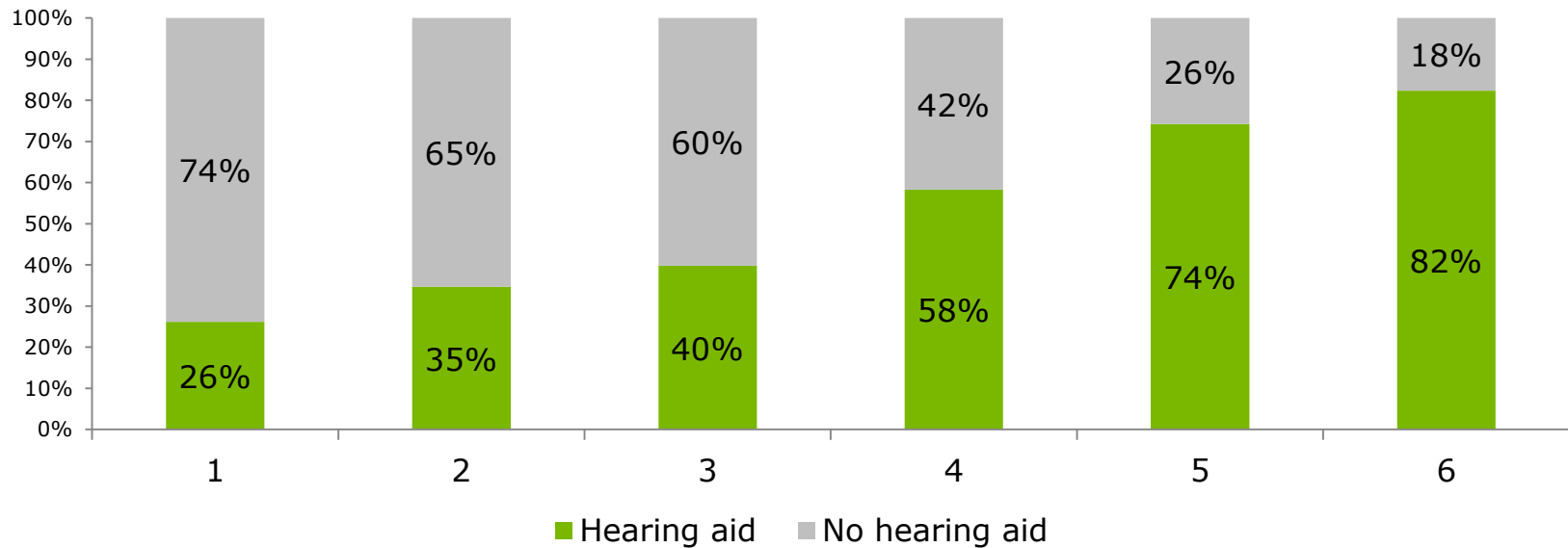
Hearing aid adoption differs

Differences may be caused by:

- Health care system
- Reimbursement system / income structure
- Market development
- Culture
- etc.



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



Hearing loss 6-groups

HA-non-owner, n=664
HA-owner, n=656

* 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

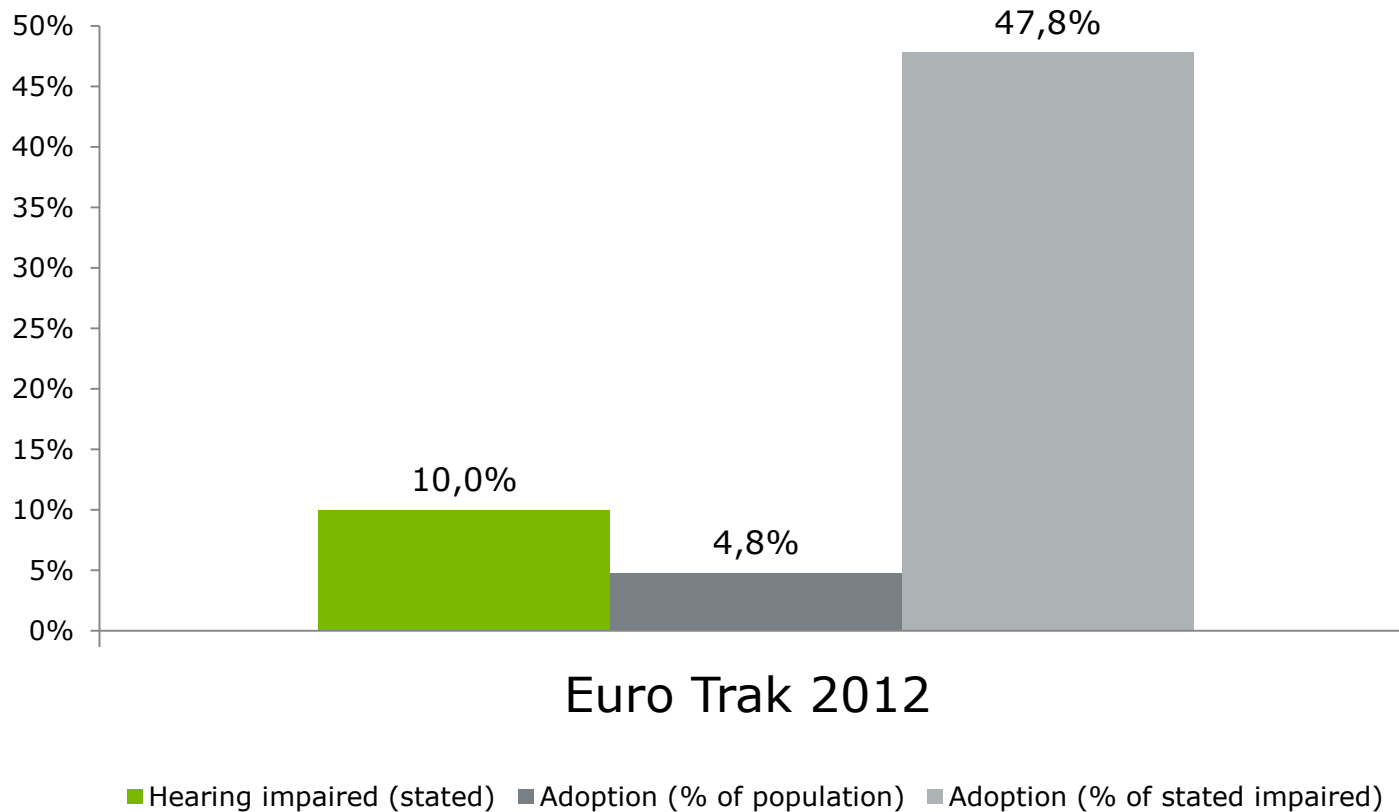
Hearing loss characteristics: Owners compared to non-owners

	HA-Non-owner n=664	HA Owner n= 656	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	42%	15%	27%
Bilateral loss	58%	85%	60%
Perceived loss			
Mild	68%	21%	23%
Moderate	24%	48%	65%
Severe	4%	22%	78%*
Profound	4%	9%	

n's are unweighted whereas the shown results are weighted

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

Overview hearing loss prevalence and hearing aid adoption

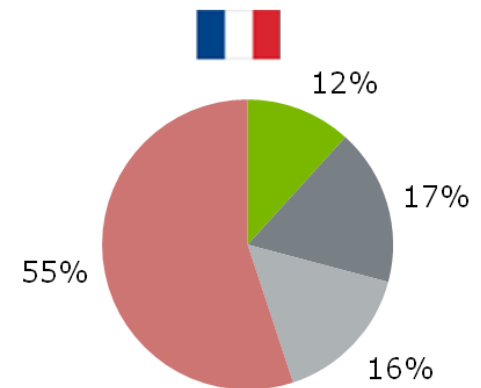
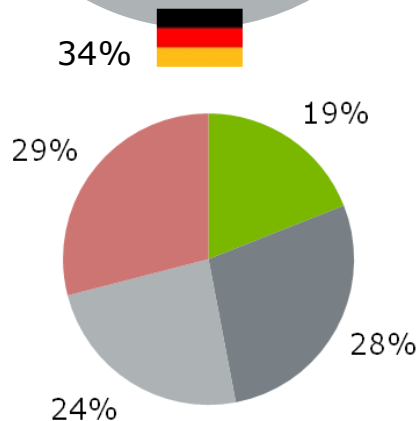
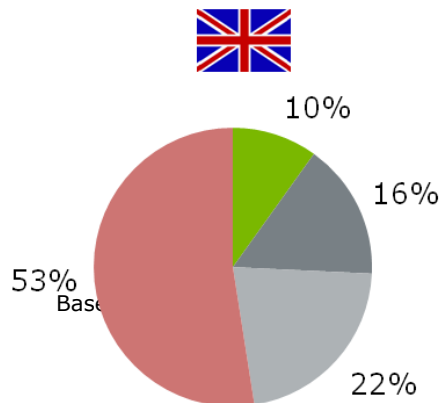
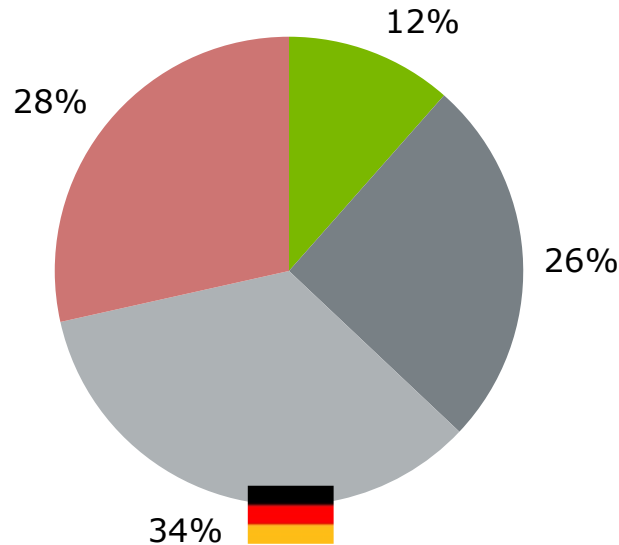


Hearing tests and prevalence of tinnitus



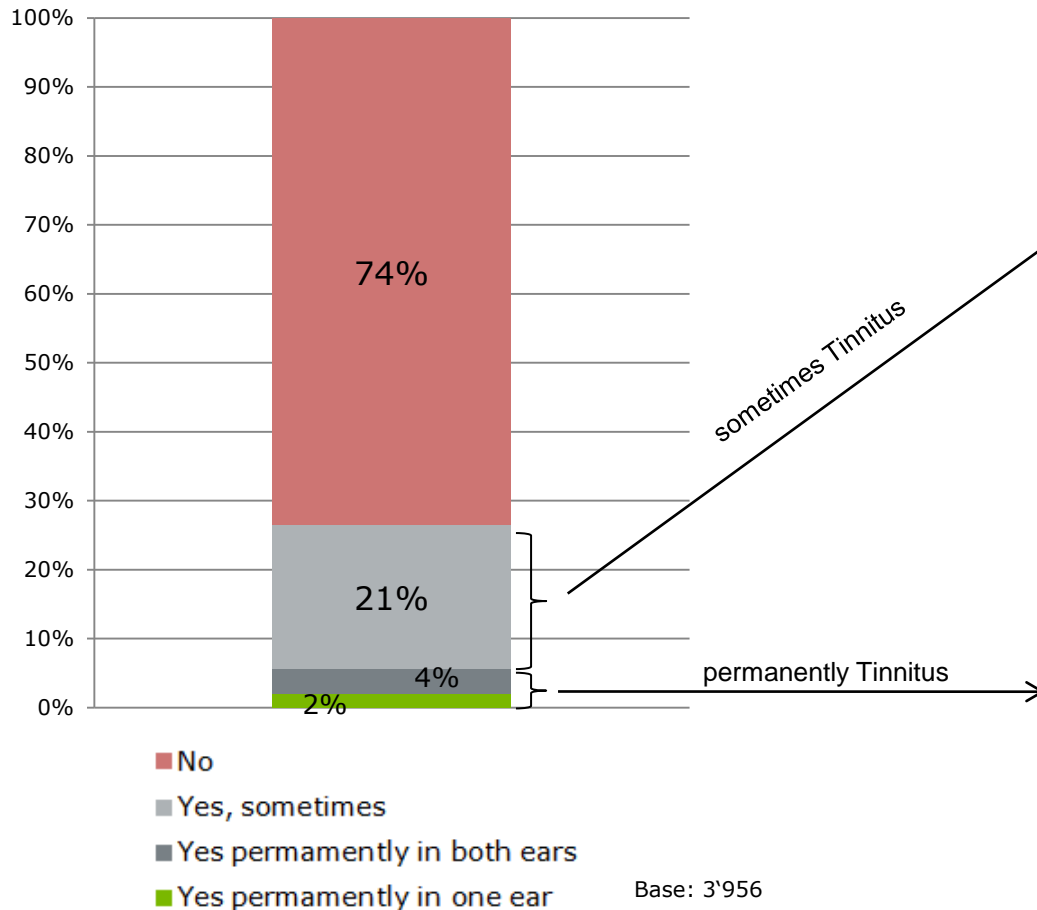
Only 28% state their hearing has never been tested

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

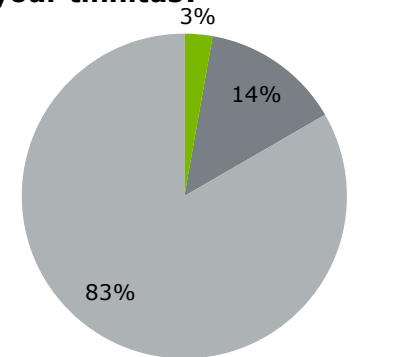


Prevalence of tinnitus 1/2

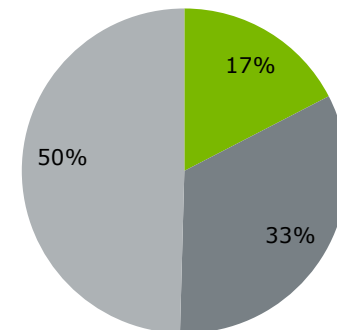
Do you have tinnitus (ringing or other noises in the ears or head) in one or both ears ?



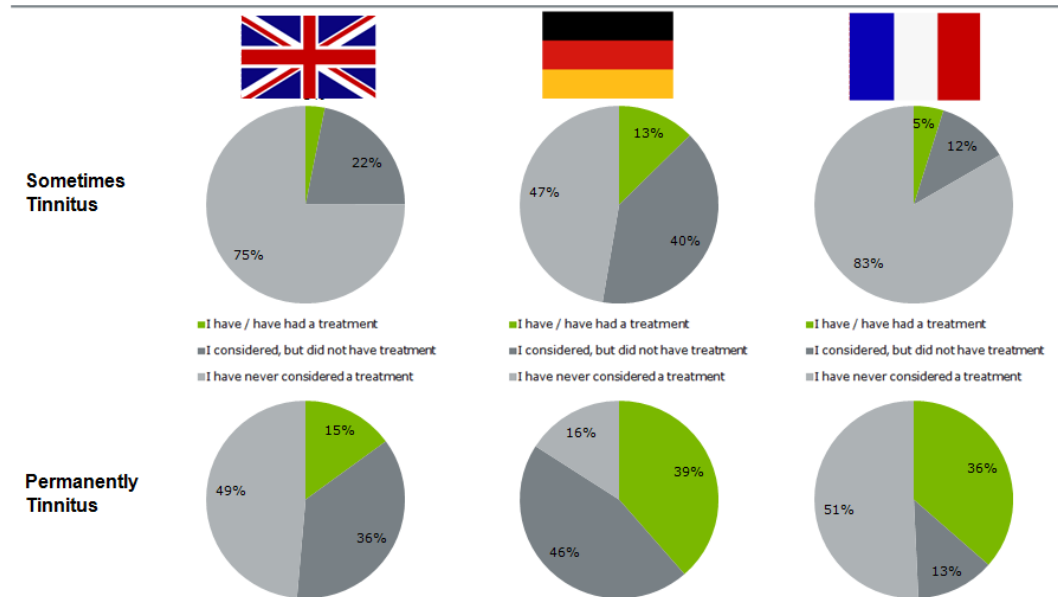
Have you ever thought about a treatment of your tinnitus?



■ I have / have had a treatment
■ I considered, but did not have treatment
■ I have never considered a treatment



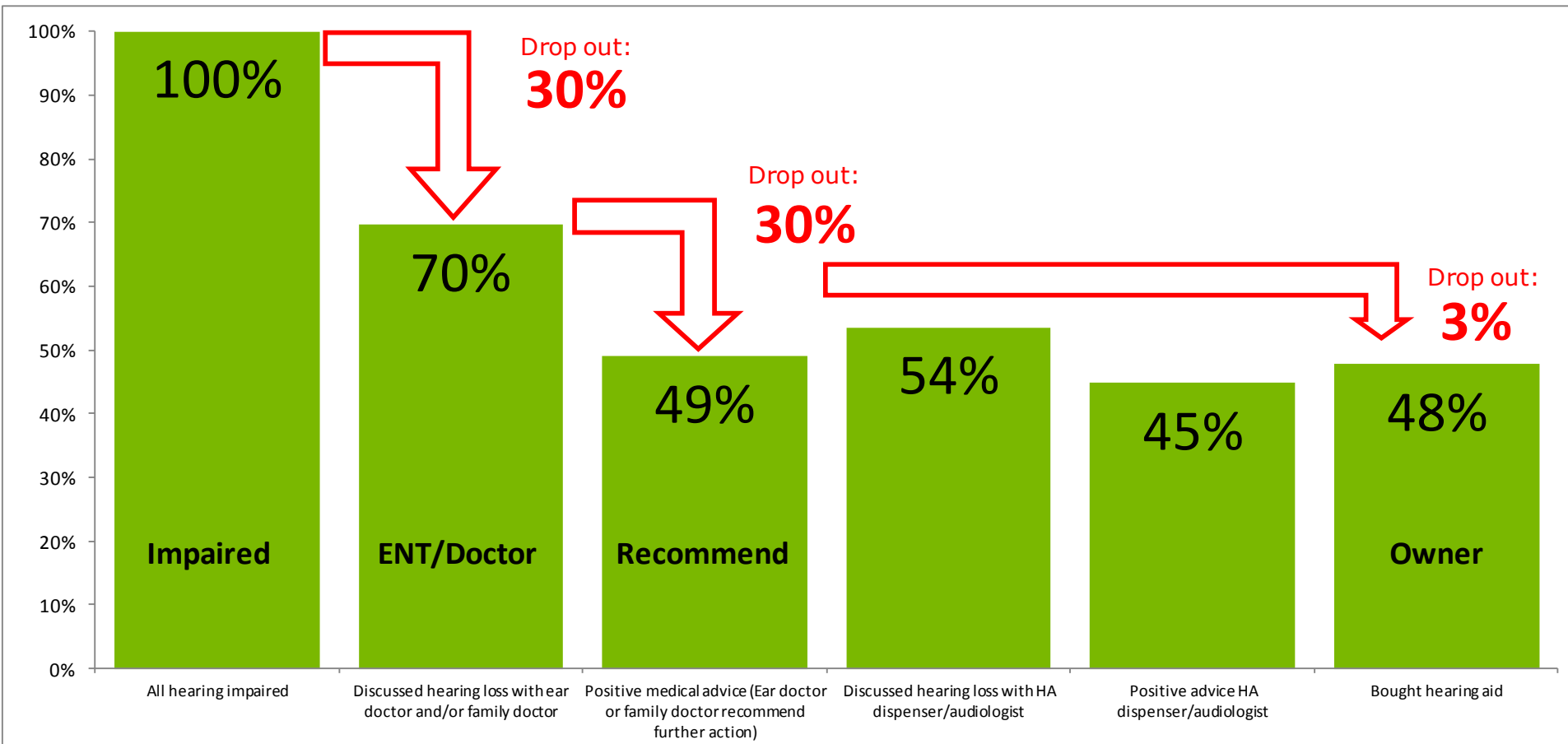
Prevalence of tinnitus 2/2



The route to the hearing aid: Drop-out rates and reasons for drop-outs

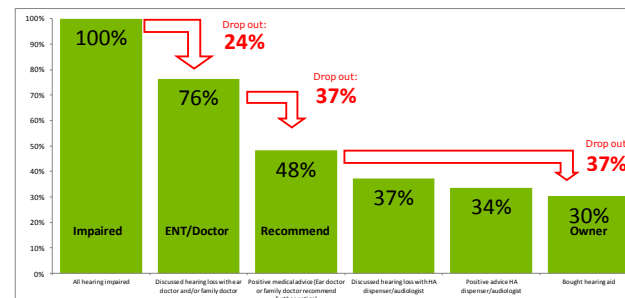
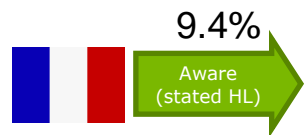
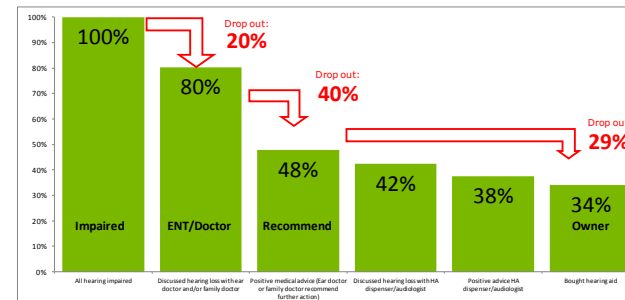
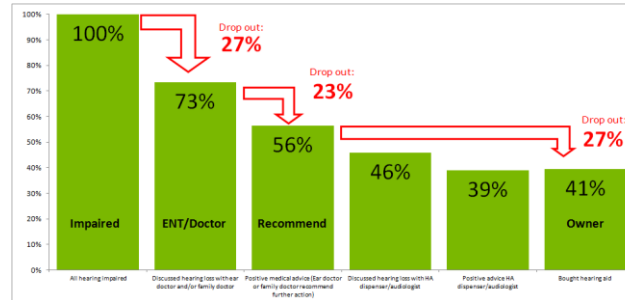


The route to the hearing aid: Overview



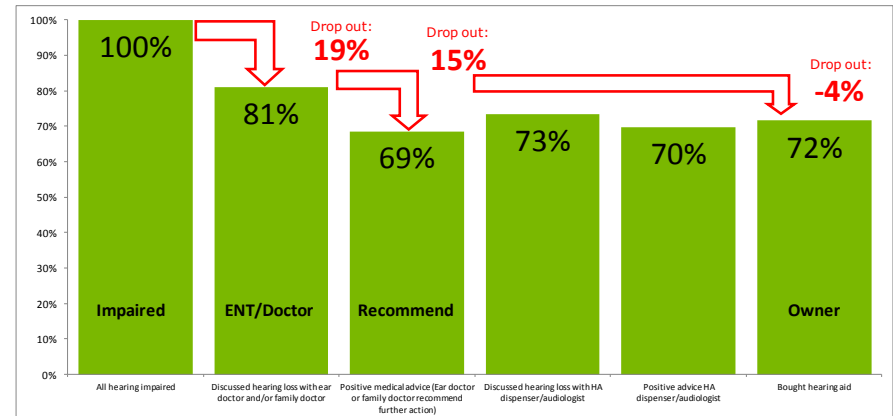
Base: n=1'320

Route to the hearing aid: Country comparison of drop-outs

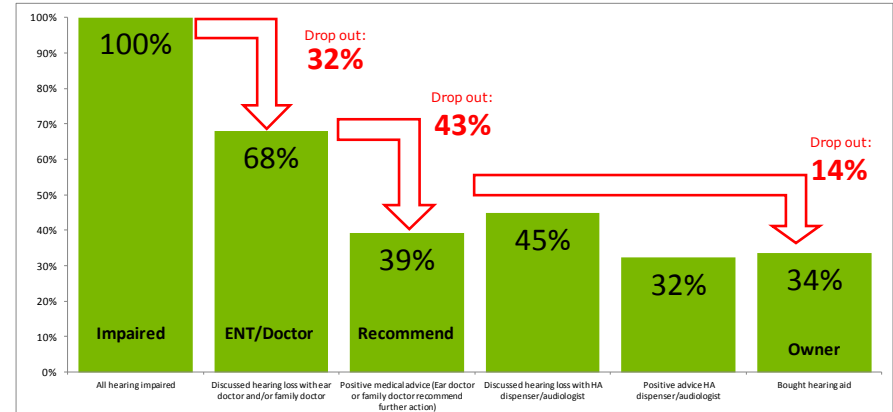


Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*



Low 50% hearing loss*

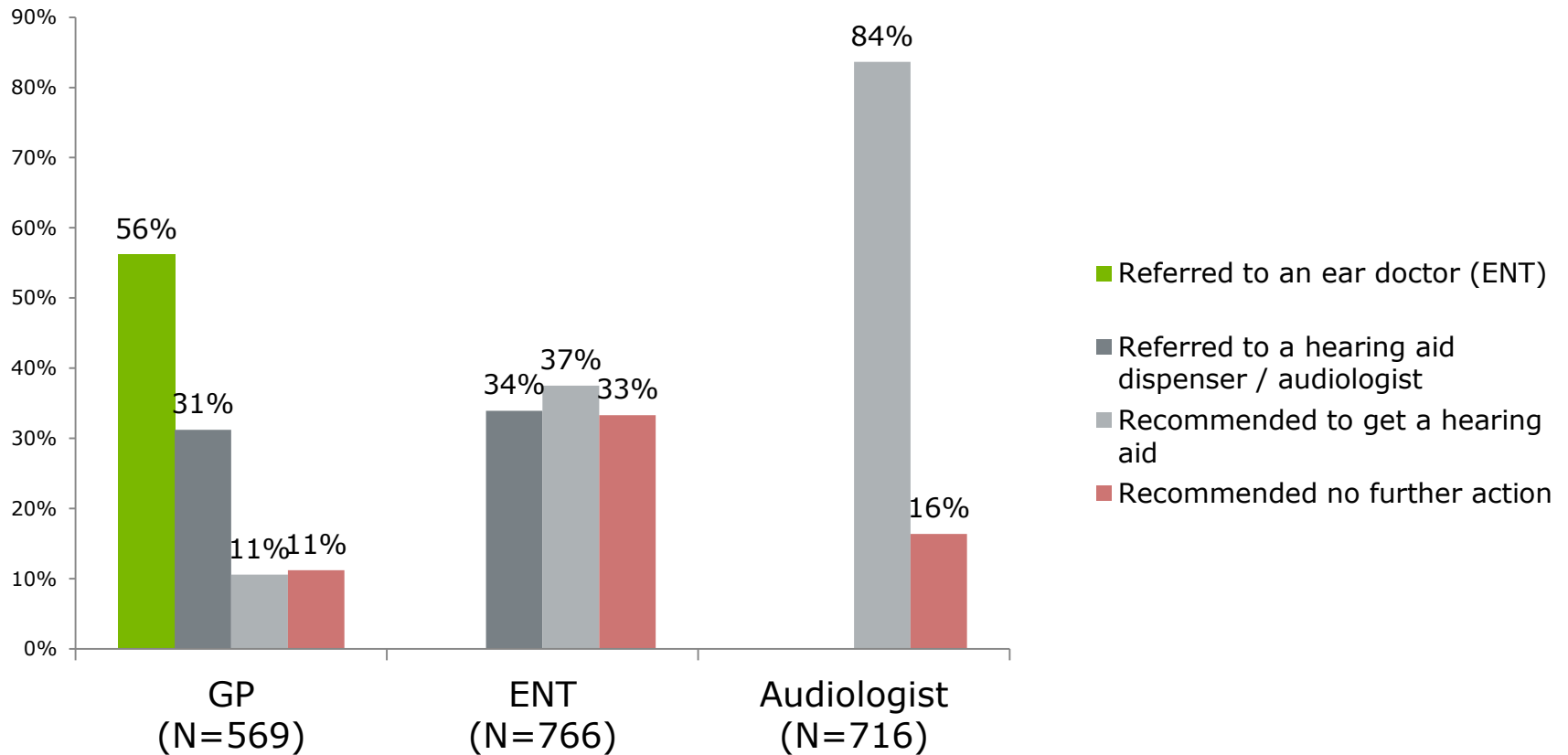


Base: n=1'320

* 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).

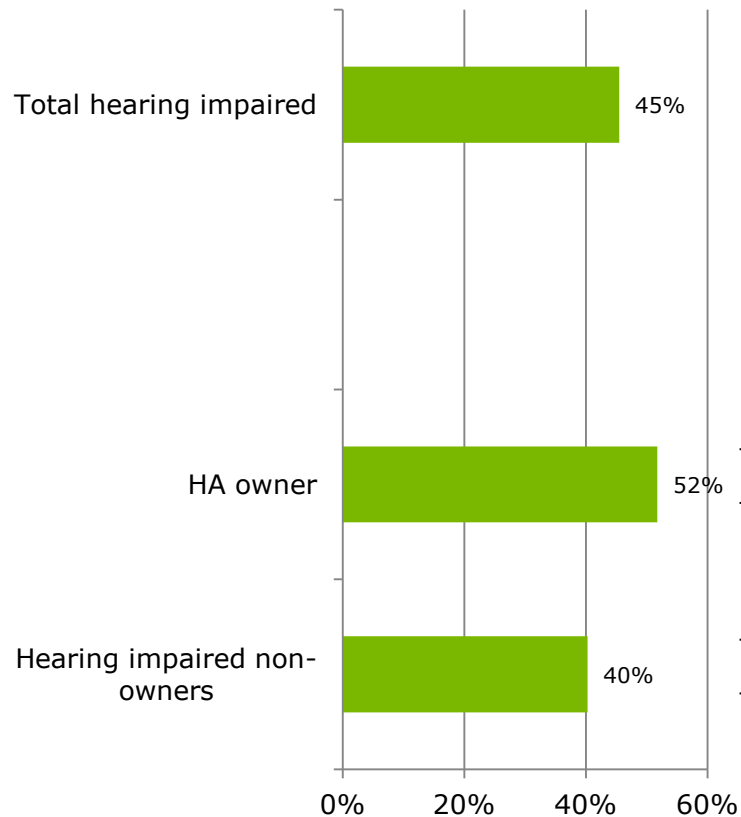
Recommendations by profession



The route to the hearing aid: GP/Family doctor

Have you discussed your hearing problem with your family doctor?

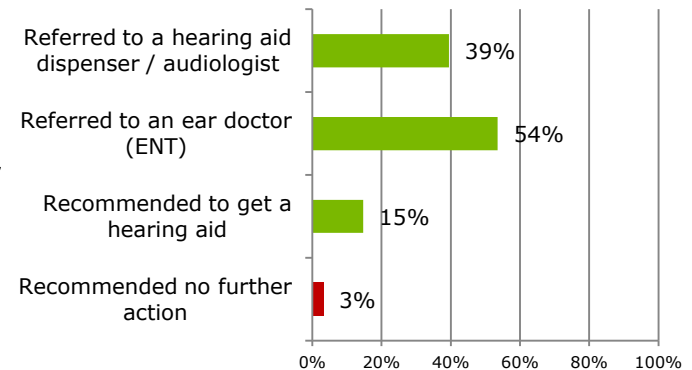
% Discussed with GP



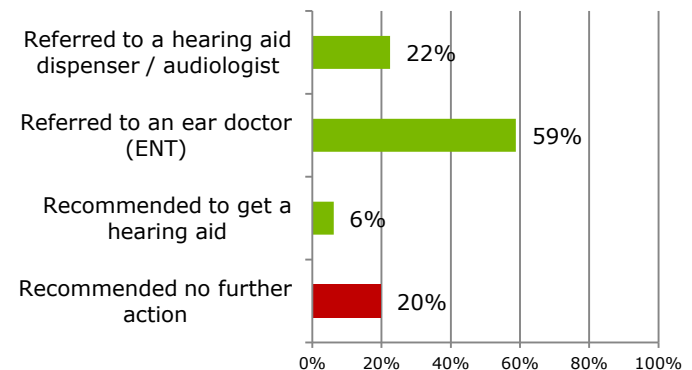
■ EuroTrak 2012
Base: 1'320

What did he/she recommend ?

HA owner (Base: 327)



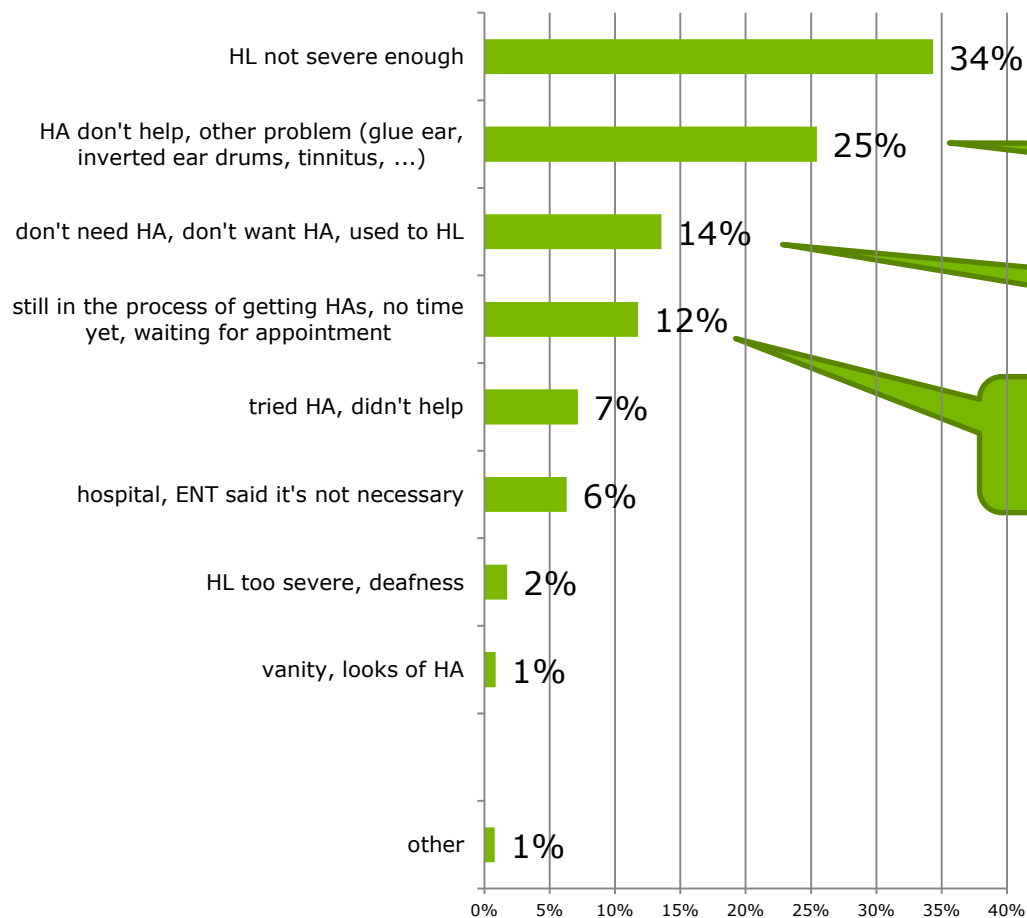
Impaired non-owner (Base: 242)



Non-owners: Reasons for not owning a HA

If GP recommended further action (open ended question, coded)

GP recommended further action



For example:

høretab er stadig svagt så jeg behøver ikke høreapparat endnu, skal have høreprøve igen om 1 år

Skade i indre øre, kan ikke afhjælpes med høreapparat

Havde fået en tid, men aflyste, da jeg ikke vil have høreapp.

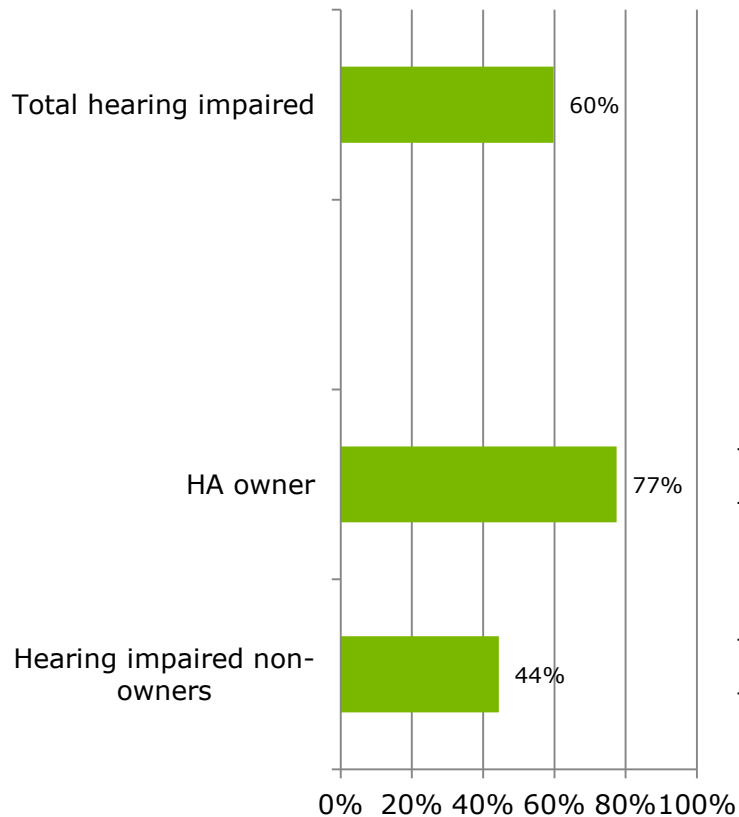
venter på en undersøgelse i århus, for at få målt hvor slemt det er og hvilken apparat jeg kan bruge

Base: 174

The route to the hearing aid: ENT

Have you discussed your hearing problem with an ear doctor (ENT)?

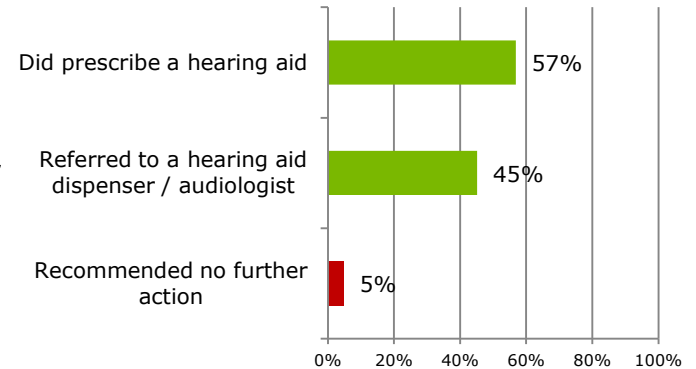
% Discussed with ENT



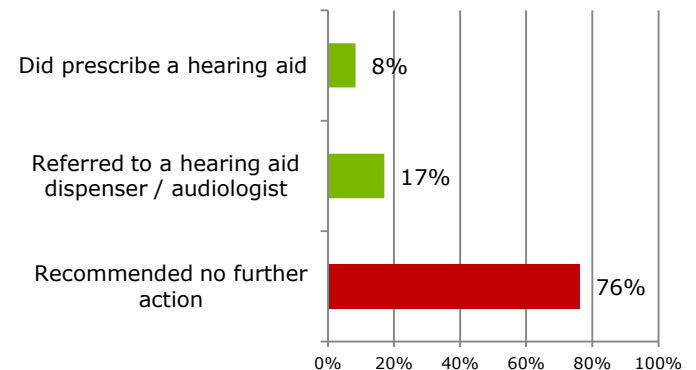
■ EuroTrak 2012
Base: 1'320

What did he/she recommend ?

HA owner (Base: 496)

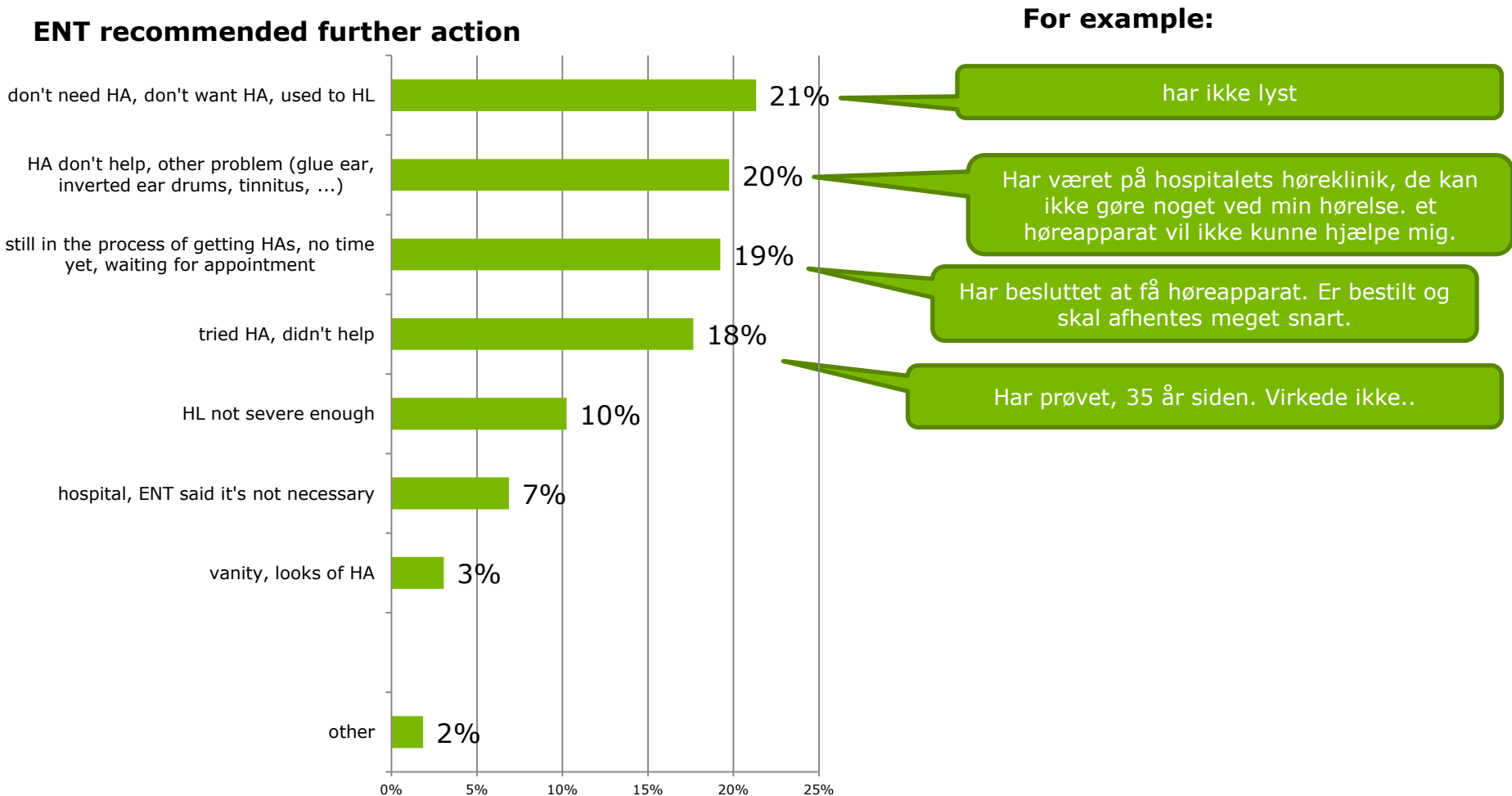


Impaired non-owner (Base: 270)



Non-owners: Reasons for not owning a HA

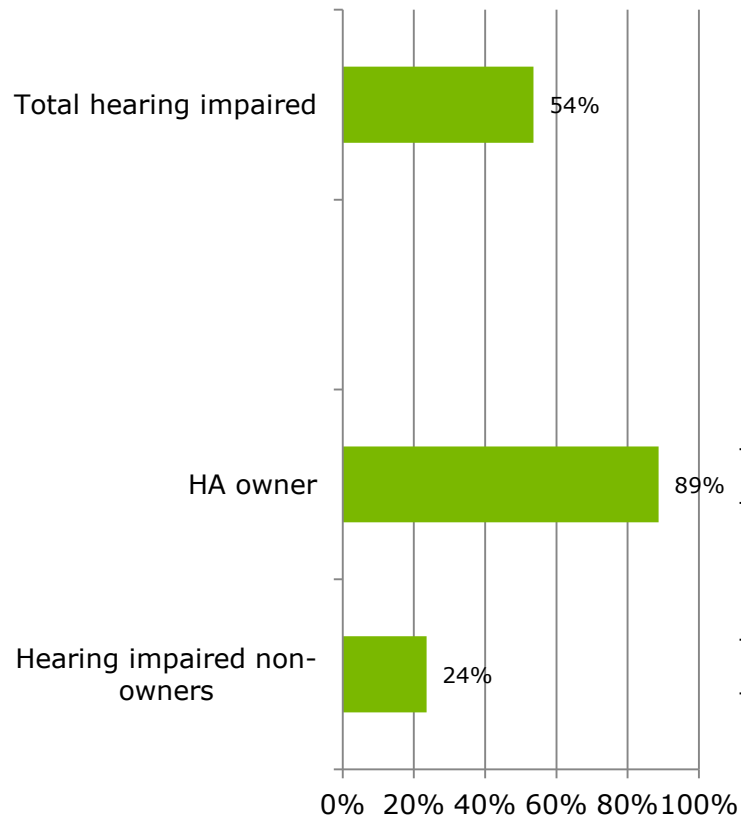
If ENT recommended further action (open ended question, coded)



The route to the hearing aid: Audiologist

Have you discussed your hearing problem with a Hearing Aid Dispenser/Audiologist?

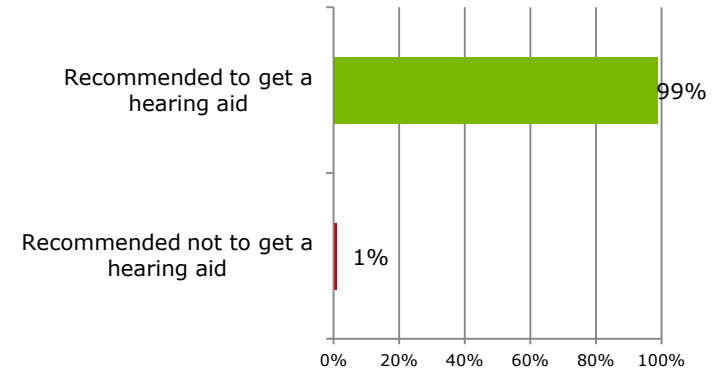
% Discussed with Audiologist



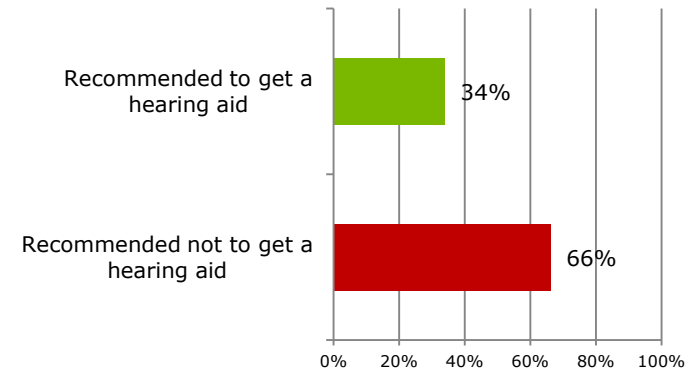
■ EuroTrak 2012
Base: 1'320

What did he/she recommend ?

HA owner (Base: 561)



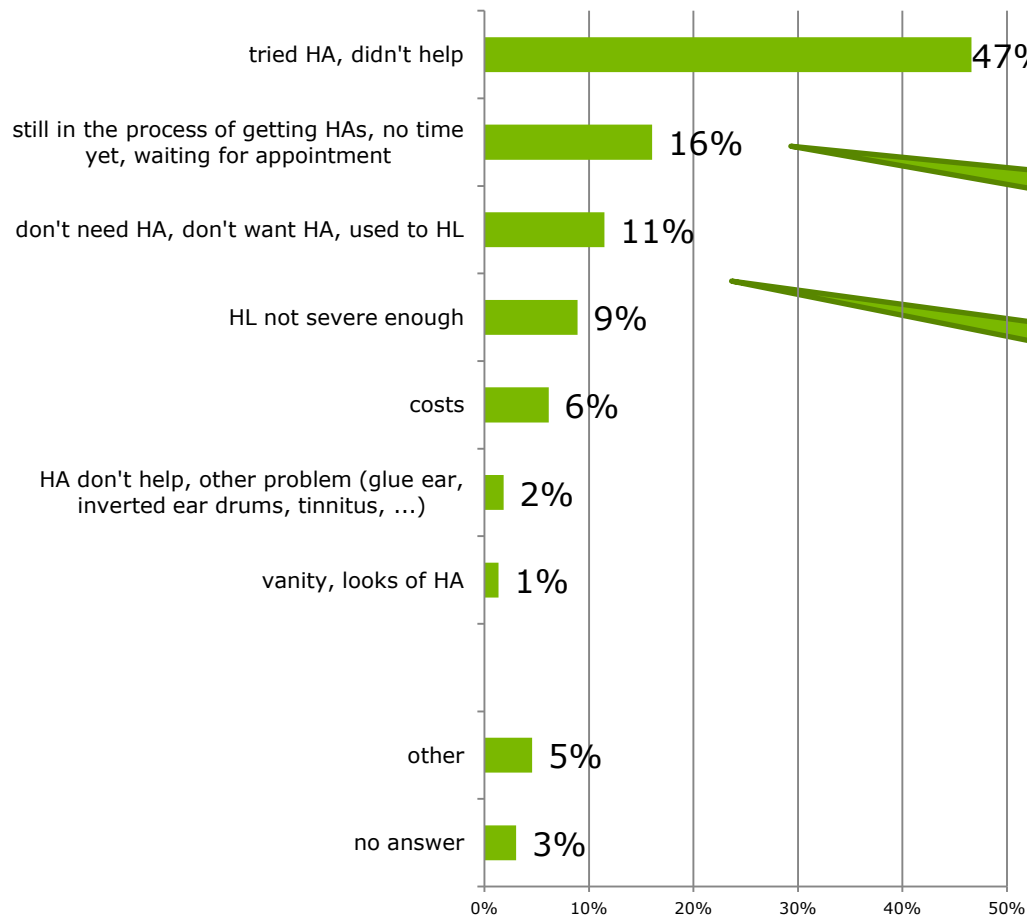
Impaired non-owner (Base: 155)



Non-owners: Reasons for not owning a HA

If Audiologist recommended to get HA (open ended question, coded)

Audiologist recommended to get HA



For example:

Jeg har anvendt høreapparat, men min høre nedsættelses karakter gør at høreapparater ikke hjælpen, men kun forstærker de lyde jeg ikke kan bruge til noget

Har besluttet at få høreapparat. Er bestilt og skal afhentes meget snart.

Jeg vil ikke have et.

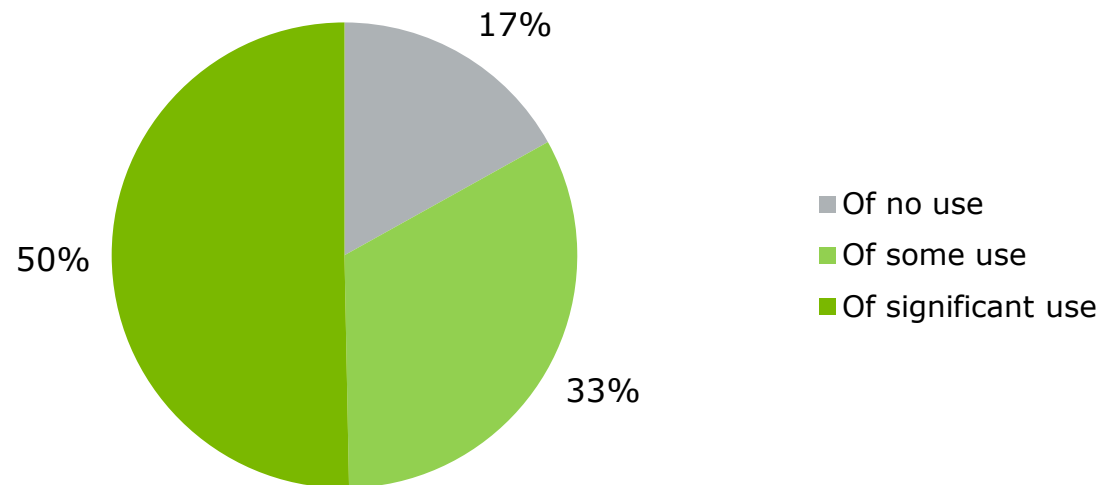
Base: 47 (low sample size!)

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



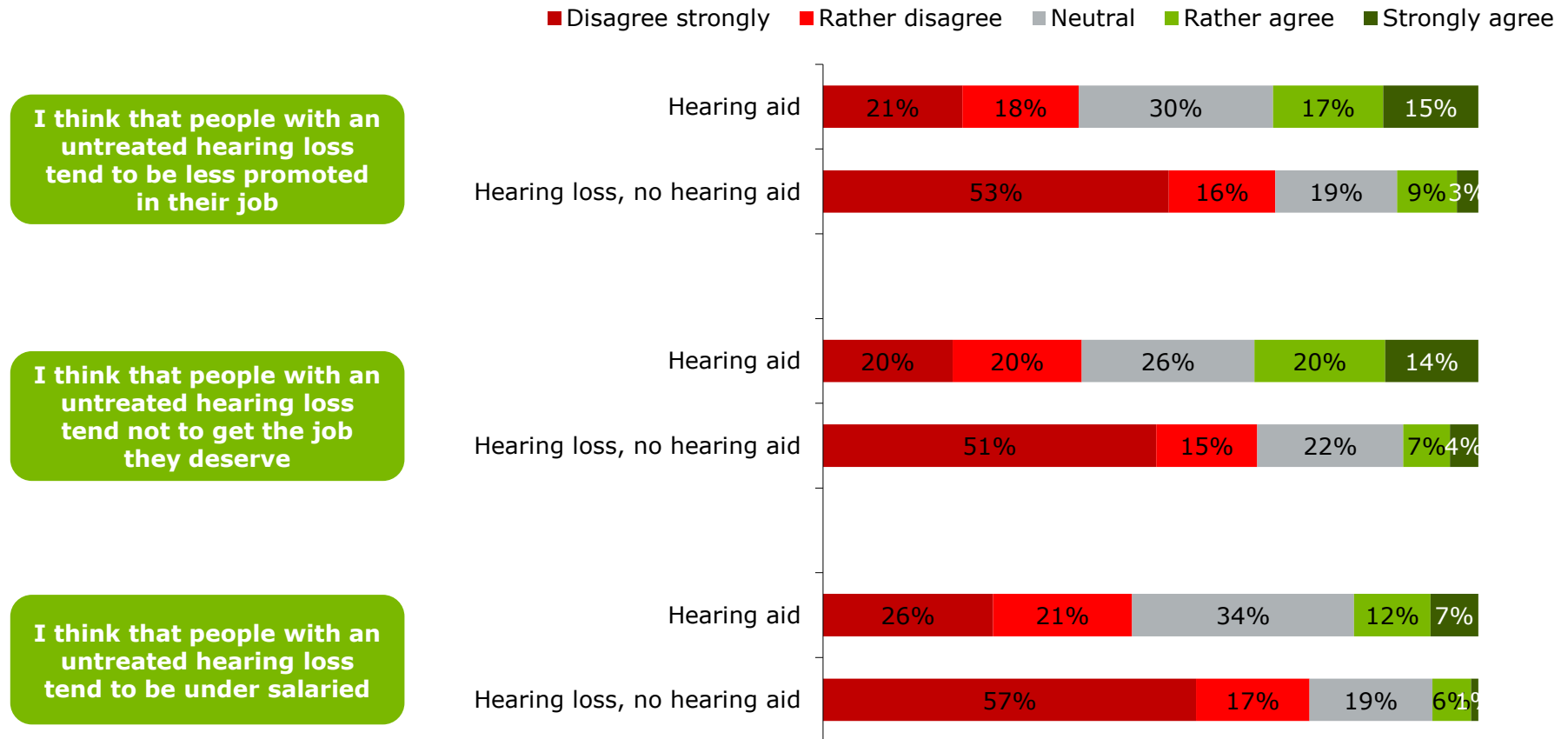
Work competitiveness: 83% of the working hearing aid owners state their hearing aid(s) are useful on their job.

How useful are your hearing aids on your job?



Base: N=204

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: Step2 : Hearing loss, no hearing aid =404/ hearing aid n=380

Social costs of mental health problems in General: Example UK



[Watch](#) One-Minute World News

Last Updated: Thursday, 13 December 2007, 05:17 GMT
[E-mail this to a friend](#) [Printable version](#)

Mental health 'costs UK billions'
 By Adam Brimelow
 BBC News, Health Correspondent

Mental health problems cost British businesses an average of £1,000 a year for every employee, researchers say.



Many employees struggle with depression

The Sainsbury Centre for Mental Health said the overall annual cost to employers, including time off work and lost productivity, is nearly £26bn.

It says most firms vastly underestimate the problem, but they could make big savings with a few simple steps.

The Federation of Small Businesses said it was harder for firms with fewer resources to put policies in place.

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Health problems: Hearing aid owners have a lower risk of being depressive and forgetful compared to impaired non-owners with comparable hearing loss (**Top50% hearing loss group***).

Depression symptoms:

PHQ-2 Screening:

In the last 2 weeks:

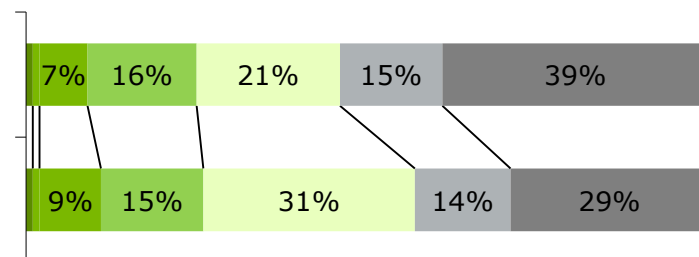
- Little interest or pleasure
- Feeling down, depressed, hopeless

Top 50% hearing loss, no hearing aid

Probability of depressive disorder %

■ 93% ■ 85% ■ 81% ■ 75% ■ 48% ■ 37% ■ 0

Hearing aid



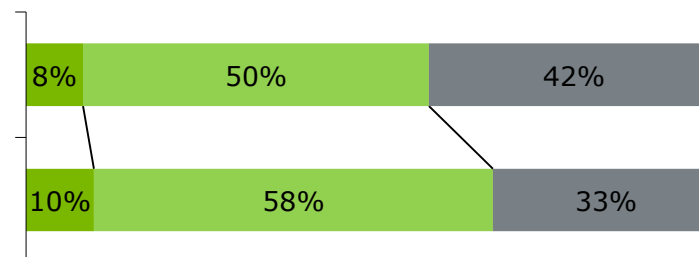
Dementia symptom:

Getting more forgetful in the last year?

Top 50% hearing loss, no hearing aid

■ Yes, much more ■ Yes, somewhat more ■ No

Hearing aid



Base: hearing aid n=454 / no hearing aid =98

*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).

Social costs of „Burnouts“ is in the daily press: Example Switzerland

Burnout, Depression, Angstzustände

Die Schweiz ist ausgebrannt

ZÜRICH/BERN - Burnout? Simulant. heisst es bei vielen Arbeitgebern. Tatsache ist: Die Zahl der **psychisch und physisch Erschöpften** steigt und verursacht in der Schweiz jährliche Kosten in Milliardenhöhe.

«Allein in der Schweiz belaufen sich die durch stressbedingte Beschwerden verursachten Kosten **auf jährlich 4,2 Milliarden Franken**. Die Vermutung liegt nahe, dass Burnout für einen Grossteil dieser Kosten verantwortlich ist», erklärt Psychiater Joe Hättenschwiler vom Zentrum für Angst- und Depressionsbehandlung (ZADZ) in Zürich.

Mentally and
physically
exhausted
people

....

cost CHF 4.2
billions/year
in Switzerland

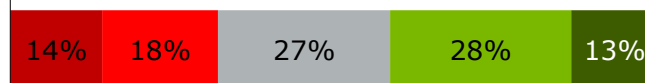
Source: CH-Blick; 13.4.2012

Compared to impaired hearing aid non-owners with significant hearing loss (Top 50% hearing loss group*), hearing aid owners feel less exhausted in the evenings

■ Disagree strongly ■ Rather disagree ■ Neutral ■ Rather agree ■ Strongly agree

In the evenings I often feel physically exhausted

Hearing aid



Top 50% hearing loss, no hearing aid

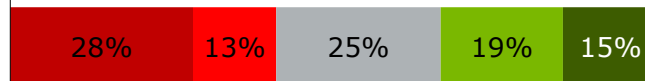


In the evenings I often feel mentally exhausted

Hearing aid



Top 50% hearing loss, no hearing aid



Base : Top 50% n=141 / hearing aid n=391

*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).

Additional information

	Top 50% hearing loss, no hearing aid	Hearing aid
-44 years	31%	13%
45-64 years	44%	27%
64+ years	25%	60%

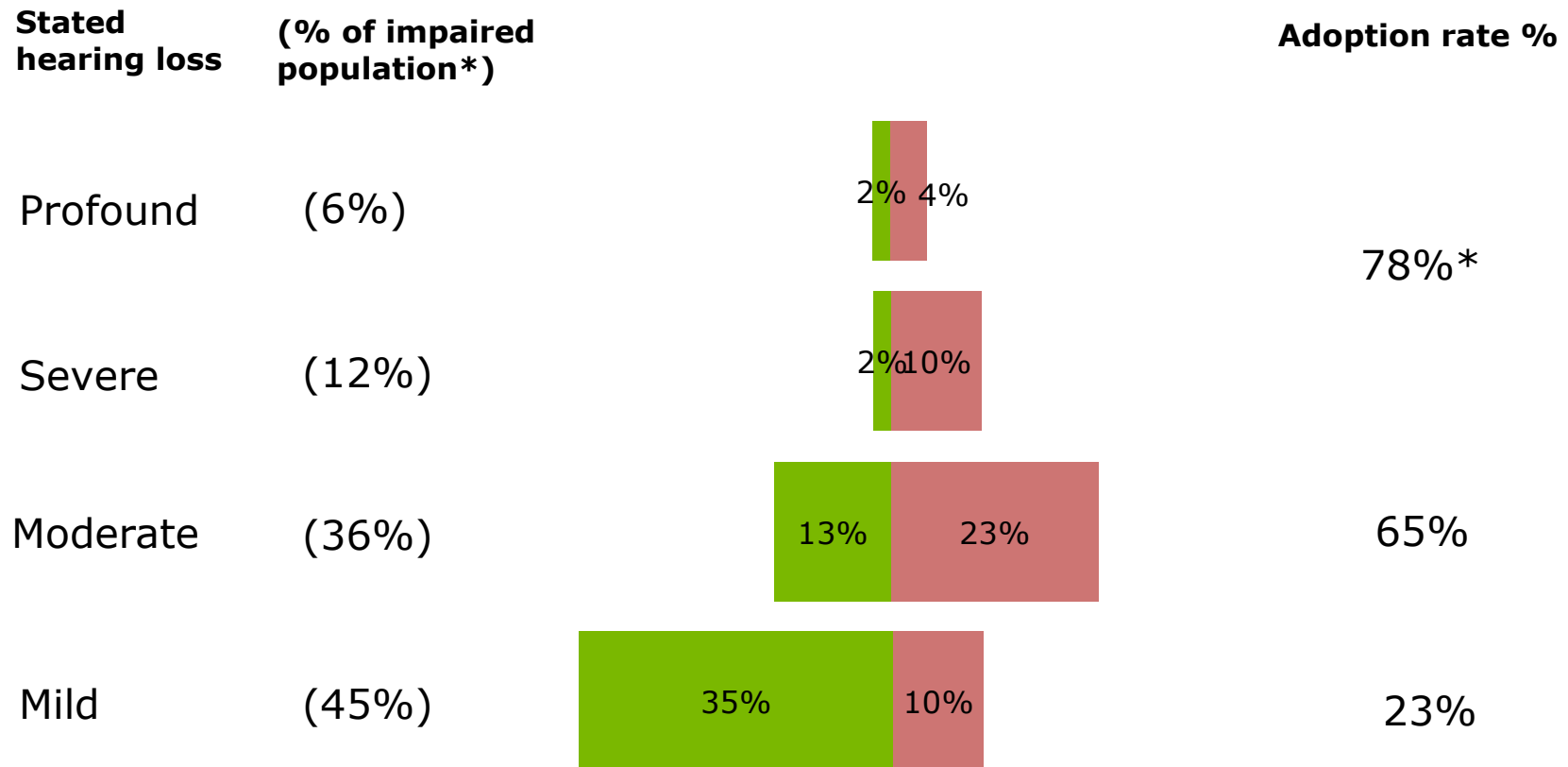
3. Analysis of hearing aid owners



Hearing aid ownership and usage



Low adoption rates within mild hearing loss



Base: n=1'320

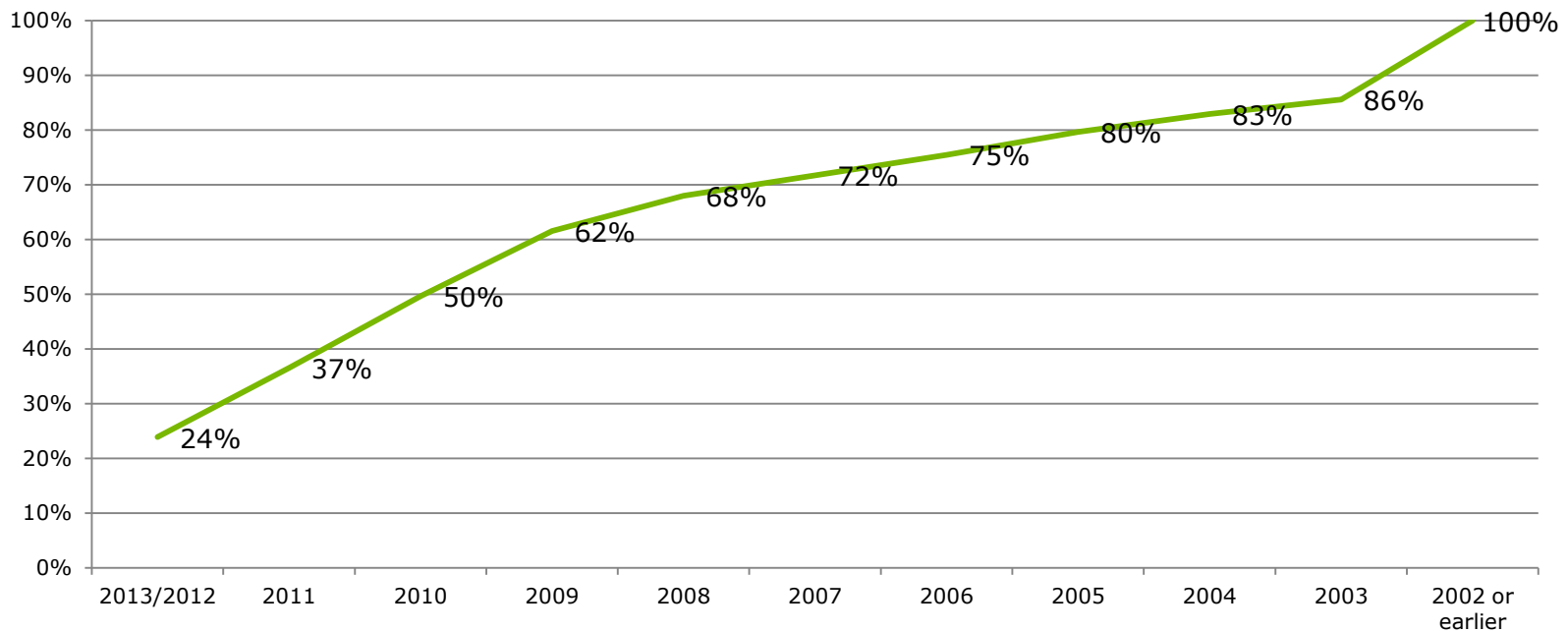
Sums can differ from 100% due to rounding

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

■ No hearing aid
■ Hearing aid

50% of the currently owned HAs were acquired in 2010 or later

Year of purchase



Age of currently owned HAs (Mean):
2012: 4.1 years



Age of currently owned HAs (Mean):
2012: 2.1 years
2009: 2.6 years



Age of currently owned HAs (Mean):
2012: 3.0 years
2009: 3.4 years

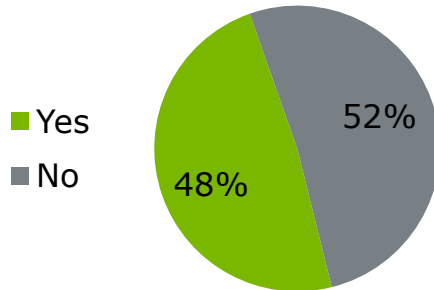


Age of currently owned HAs (Mean):
2012: 2.5 years
2009: 2.9 years

HA-owner, n=656

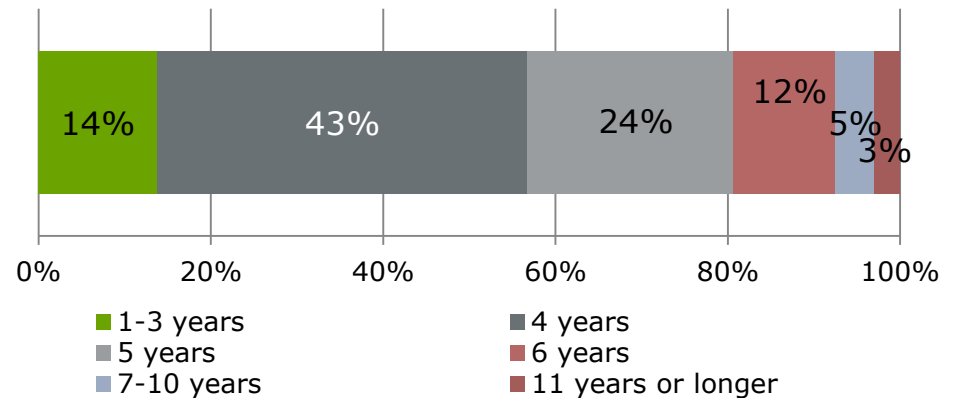
48% are first time HA users – non first time users kept their HAs for 4 years on average

Current HAs = first HAs?



HA-owner, n=656

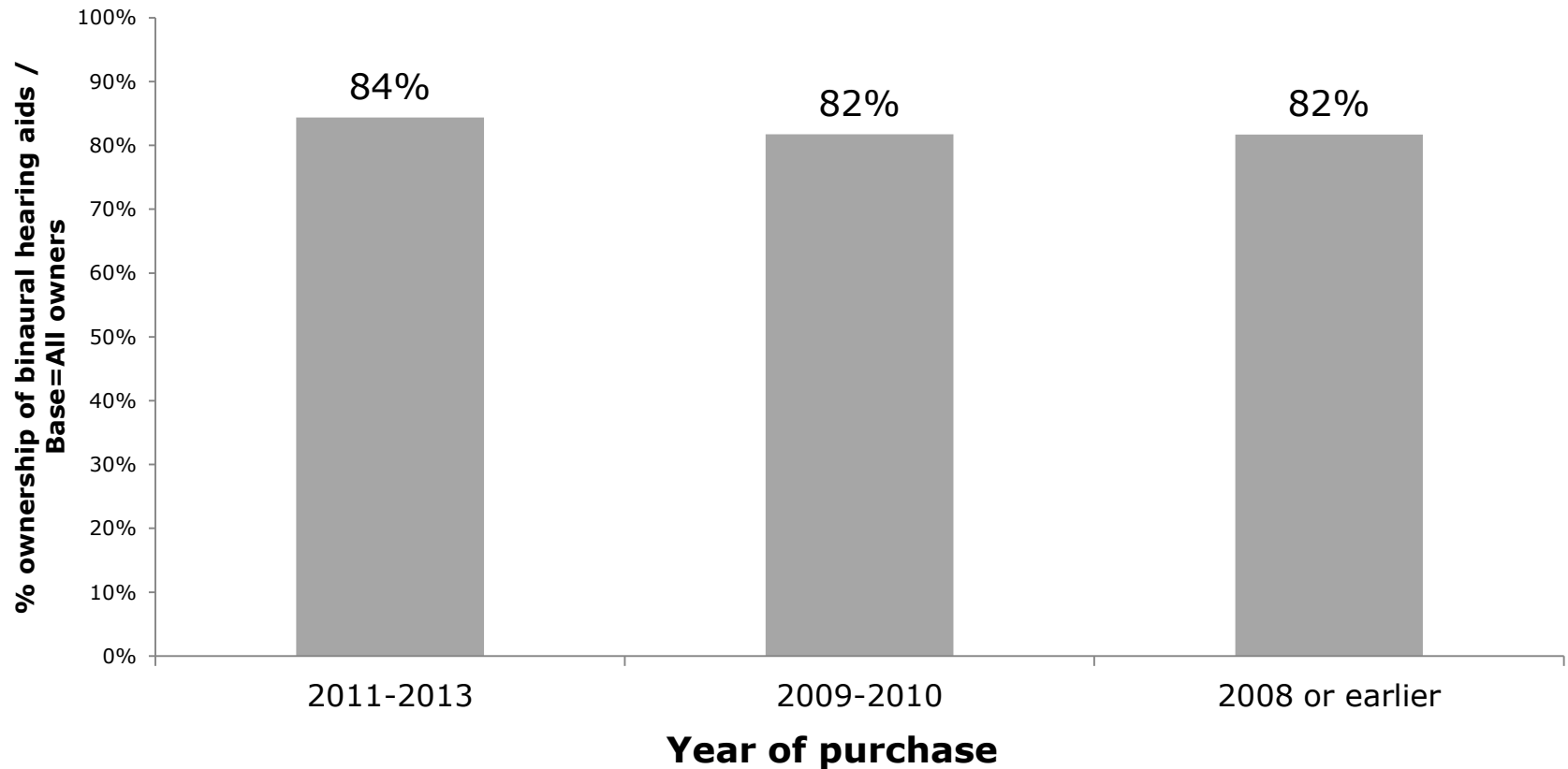
How many years did you own your previous HAs?



Base: n=292

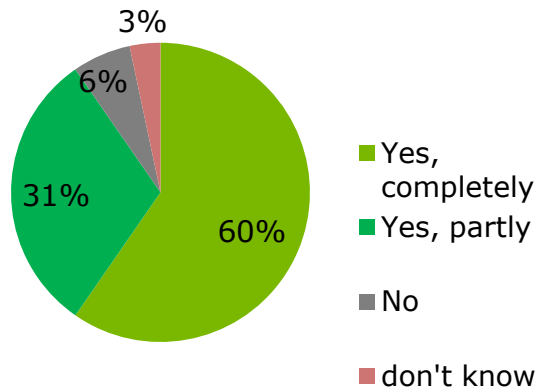
**Age of HA before it has been replaced:
2012: 4 years (median)**

Monaural-binaural treatment by purchase date



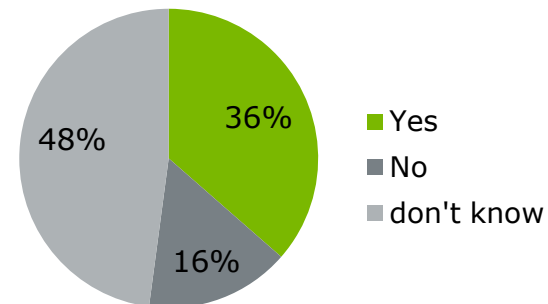
91% received some kind of 3rd party reimbursement. Information deficit non-owners: only 36% know whether government/insurance would pay

Owners: Was any part or all of your hearing aid(s) paid for by a third party ? (Insurance, Government, ...)



HA-owner, n=656

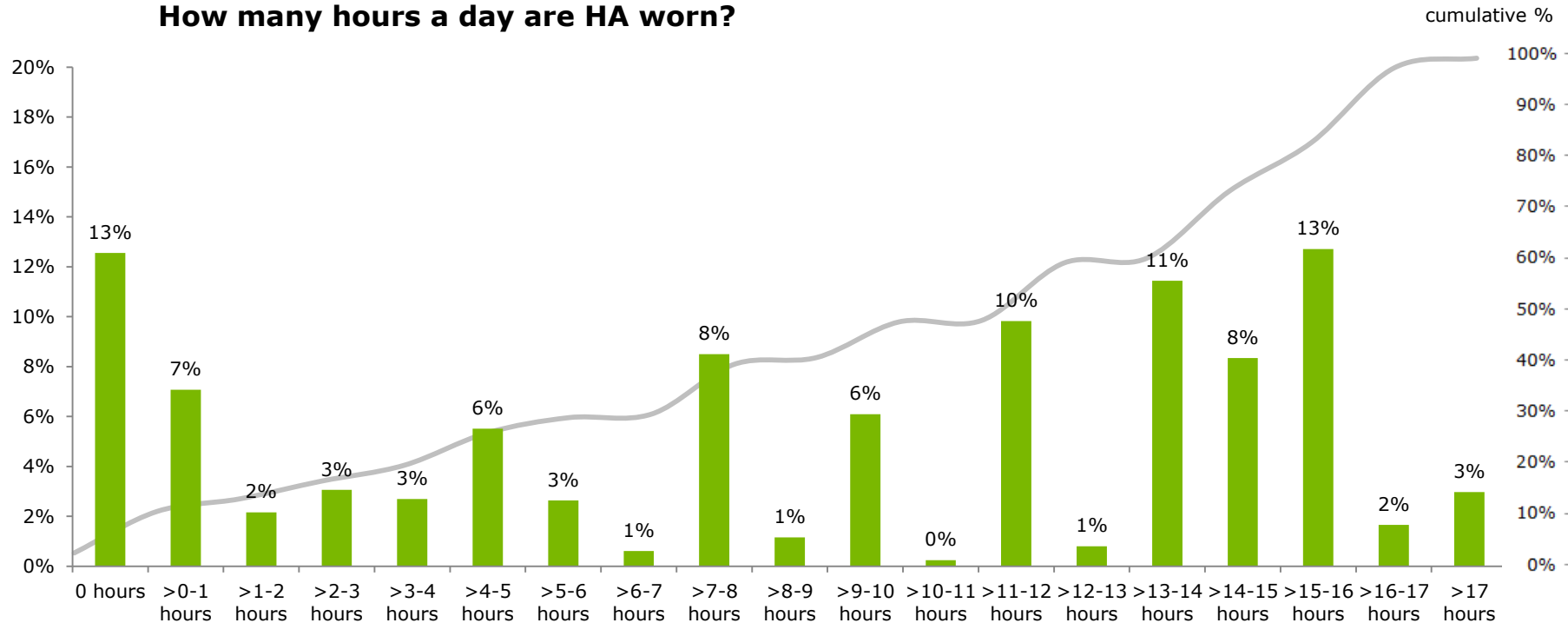
Non-owners: Based on your current knowledge, would any part or all of your hearing aid(s) be paid for by a third party? (Insurance, Government, ...)



HA-non-owners, n=664

On average, HAs are worn 9.2 hours a day

How many hours a day are HA worn?



HA worn:
2012 Mean: 8.3 hours/day
2009: Mean: 7.5 hours/day



HA worn:
2012: Mean: 8.0 hours/day
2009: Mean: 7.7 hours/day



HA worn:
2012: Mean: 9.2 hours/day
2009: Mean: 8.3 hours/day

HA worn:
Mean: 9.2 hours/day

In the drawer (0 hours):

All HA owners:	13%
HA from offentlig h�r�klin�k:	15%
HA from privat h�r�apparatbutik:	8%

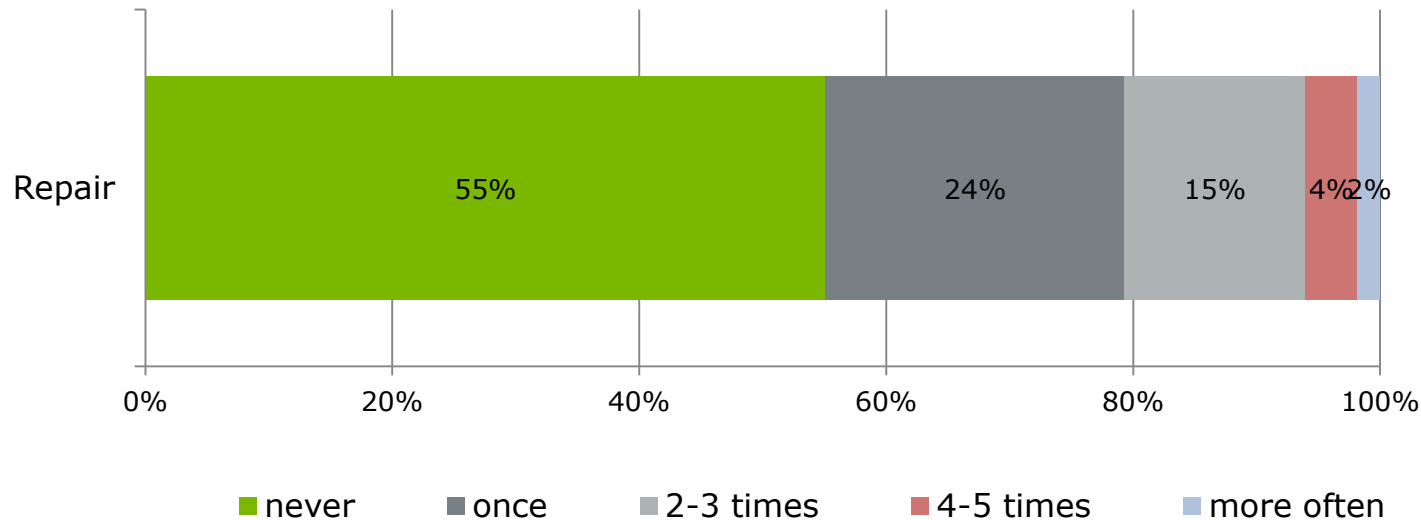
HA-owner, n=656

Hearing aids in the drawer

Country	Worn 0 hours/day	Worn 0-1 hours/day
JAP	12%	29%
NOR	10%	24%
DEN	13%	20%
UK	8%	19%
SUI	4%	16%
ITA	7%	15%
GER	4%	13%
FRA	3%	7%

79% of the currently owned HAs either had no repair need or only once

How often has your current hearing aid required a repair because it was not working properly?



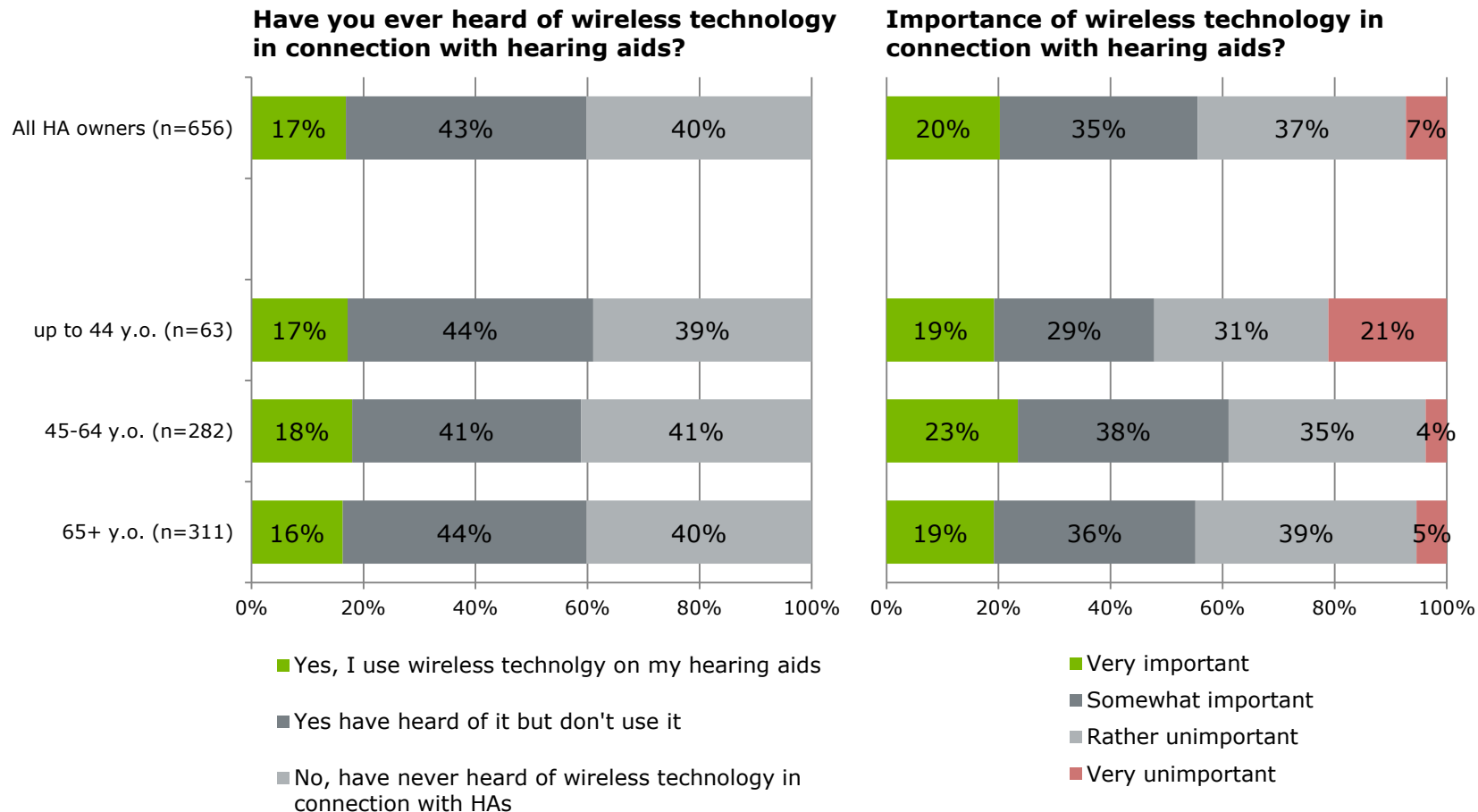
HA-owner, n=656

Awareness and importance of wireless technology

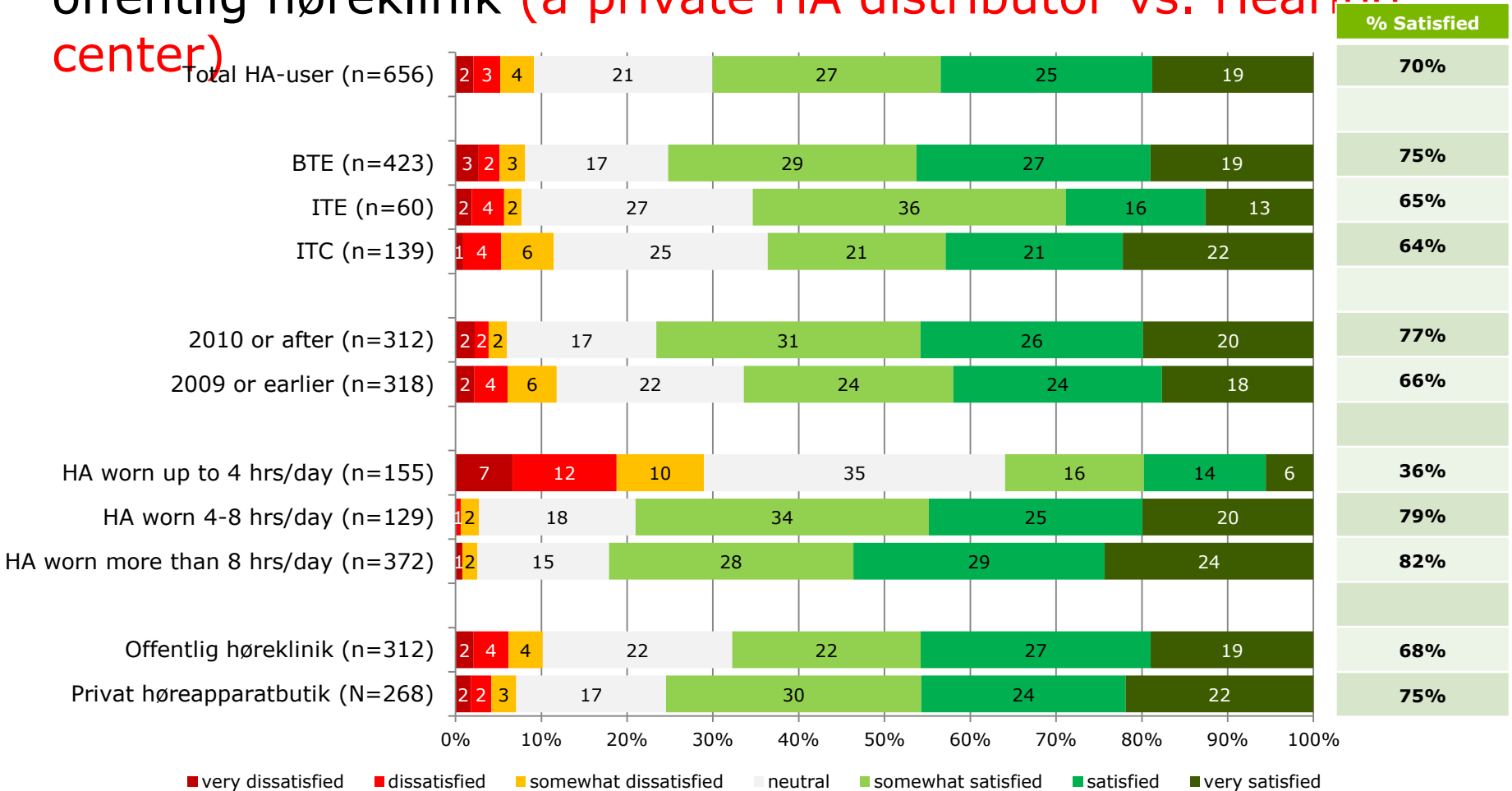


Only 1 out of 5 hearing aid owners uses wireless technology

Wireless Technology



Overall satisfaction with HA: Highest satisfaction for the following groups: **BTEs**, purchased 2010 or after, worn more than 8 hrs/day, purchased at privat høreapparatbutik vs. offentlig høreklínik (a private HA distributor vs. Hearing center)

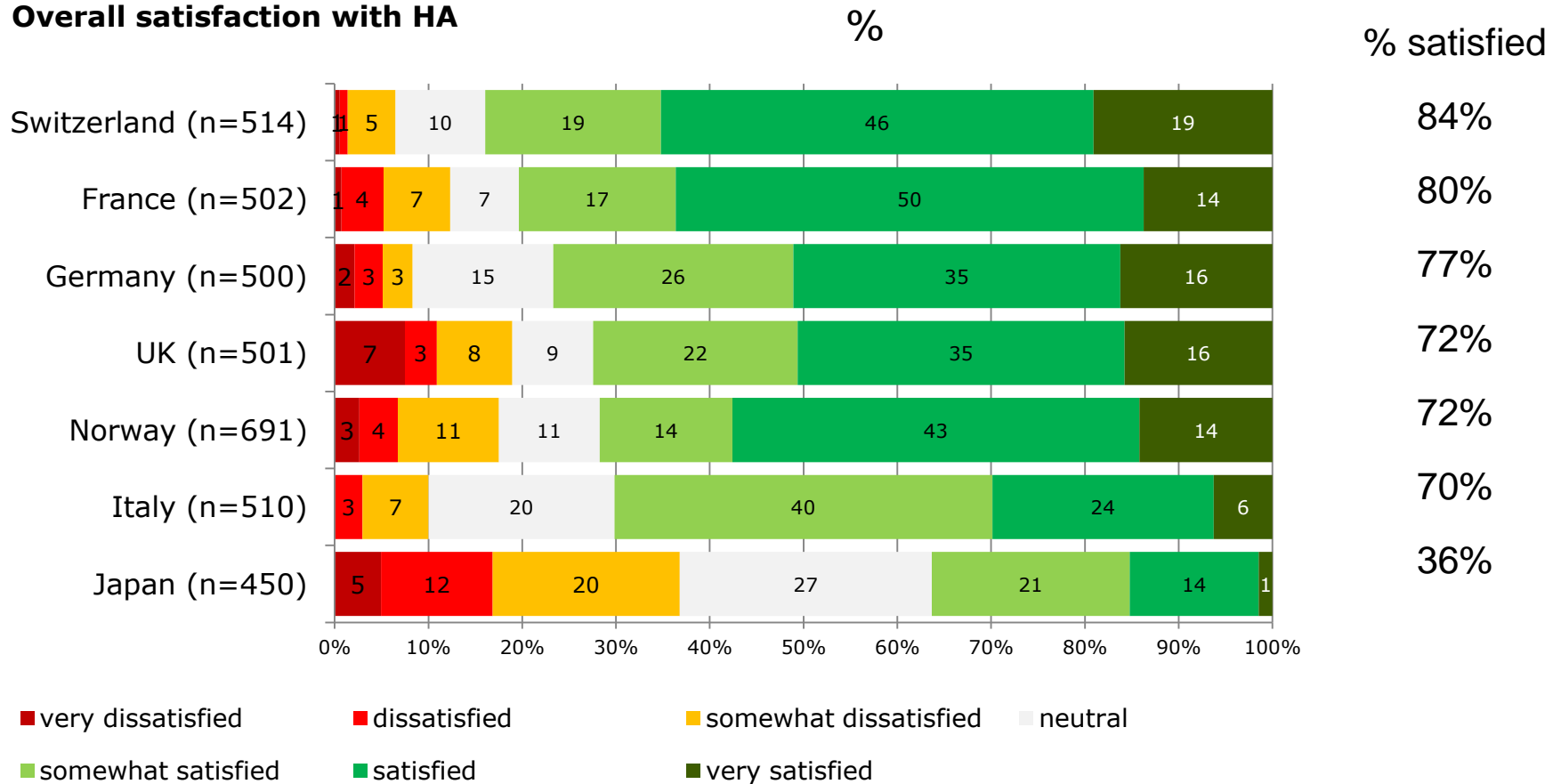


Overall Satisfaction with HA: Country comparison

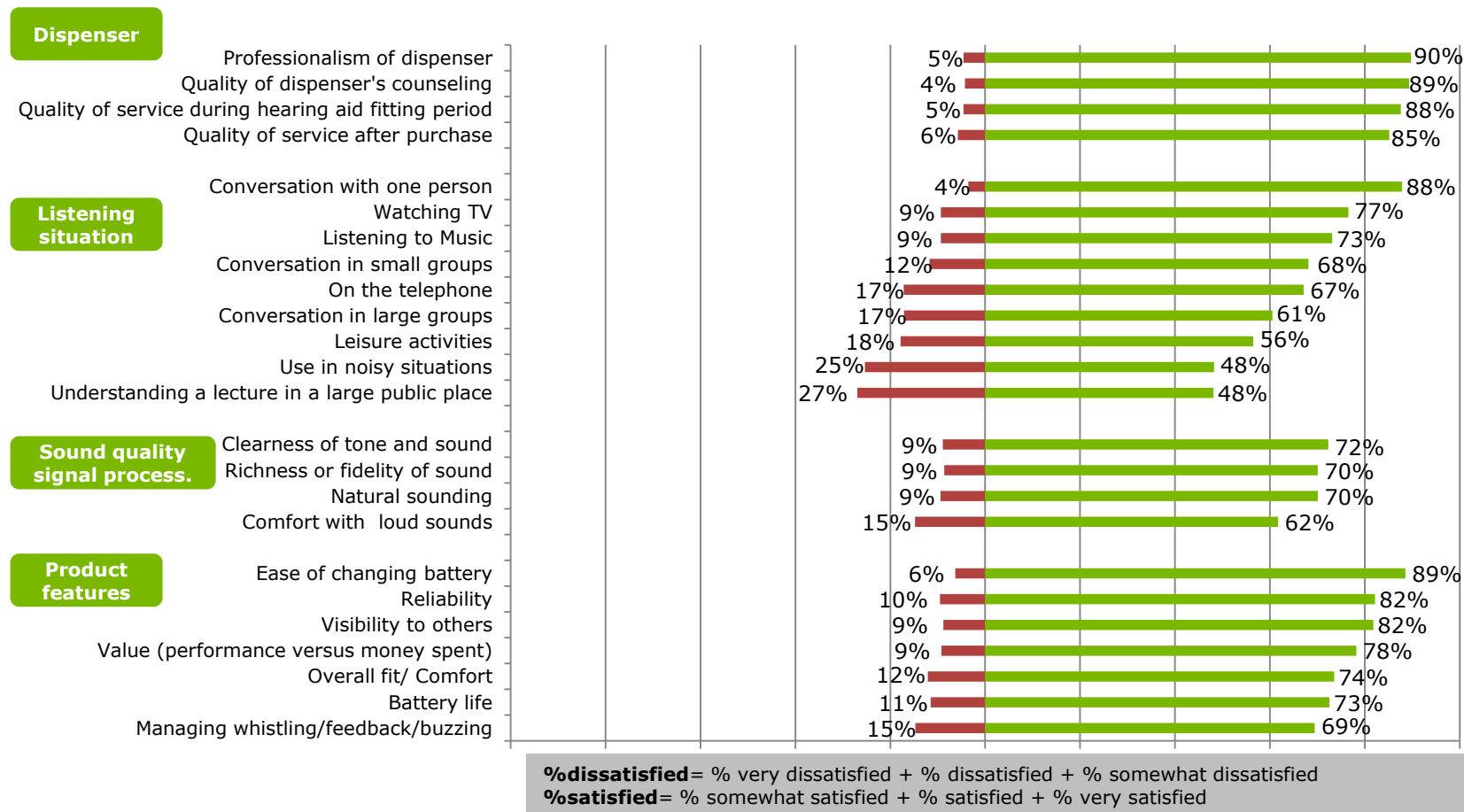
	Denmark EuroTrak 2012	Germany EuroTrak 2012	UK EuroTrak 2012	France EuroTrak 2012	USA Marke Trak VIII (2008)
Overall satisfaction	70%	77%	72%	80%	(74%)

The majority is satisfied with their hearing aid

Overall satisfaction with HA



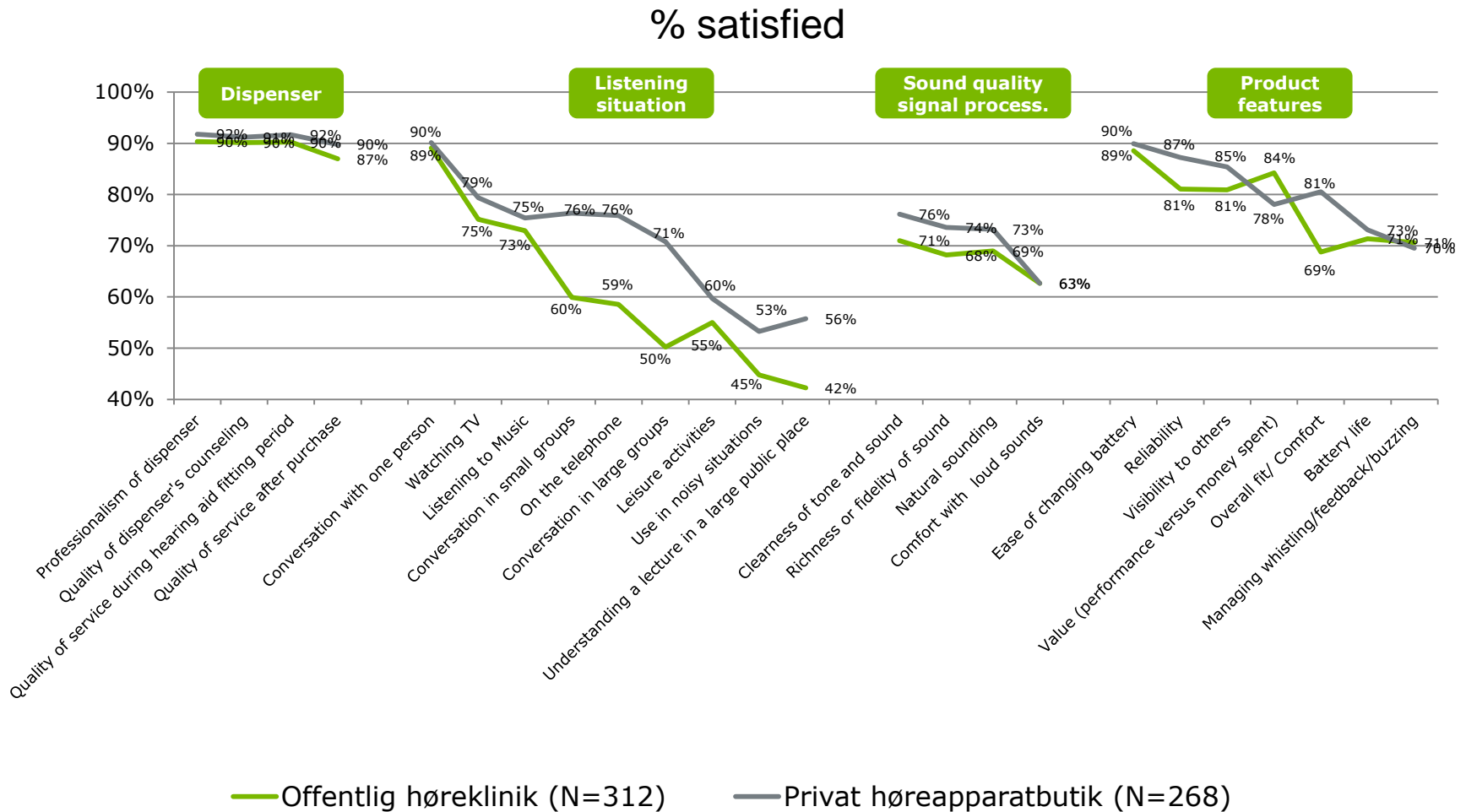
Satisfaction with current HA



■ dissatisfied ■ satisfied

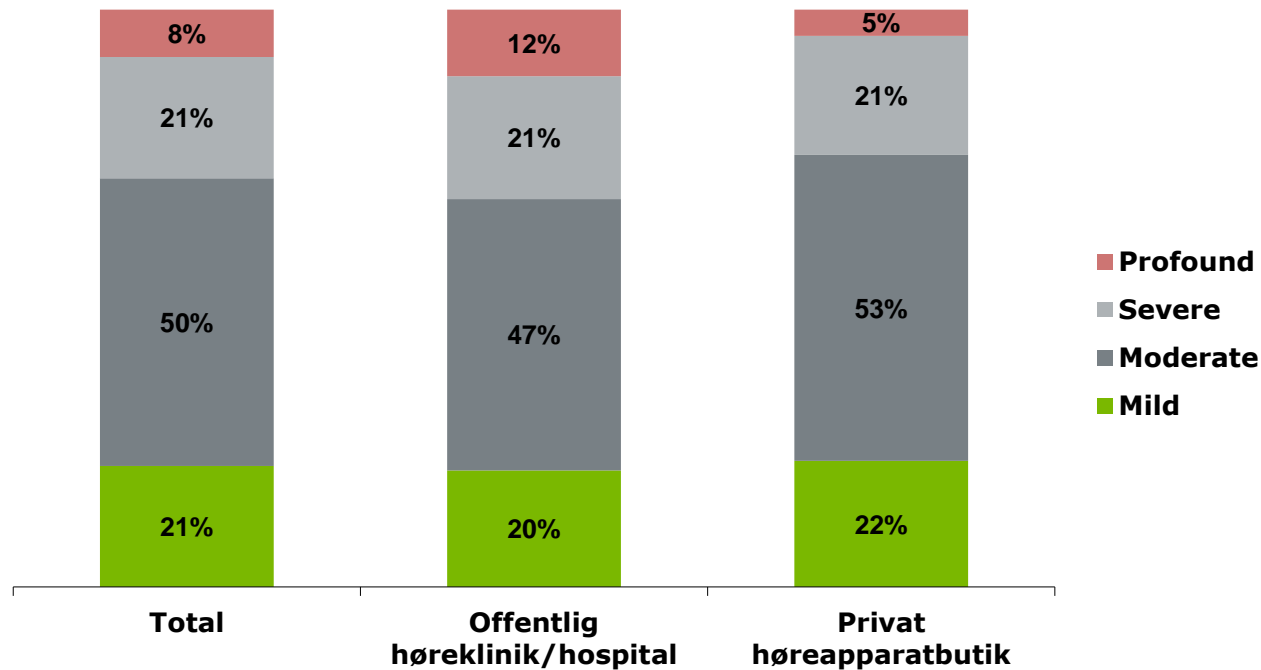
HA-owner, n=656

Satisfaction with current HA: privat høreapparatbutik vs. offentlig høreklínik (private distributor vs. Hearing center)



Additional Information

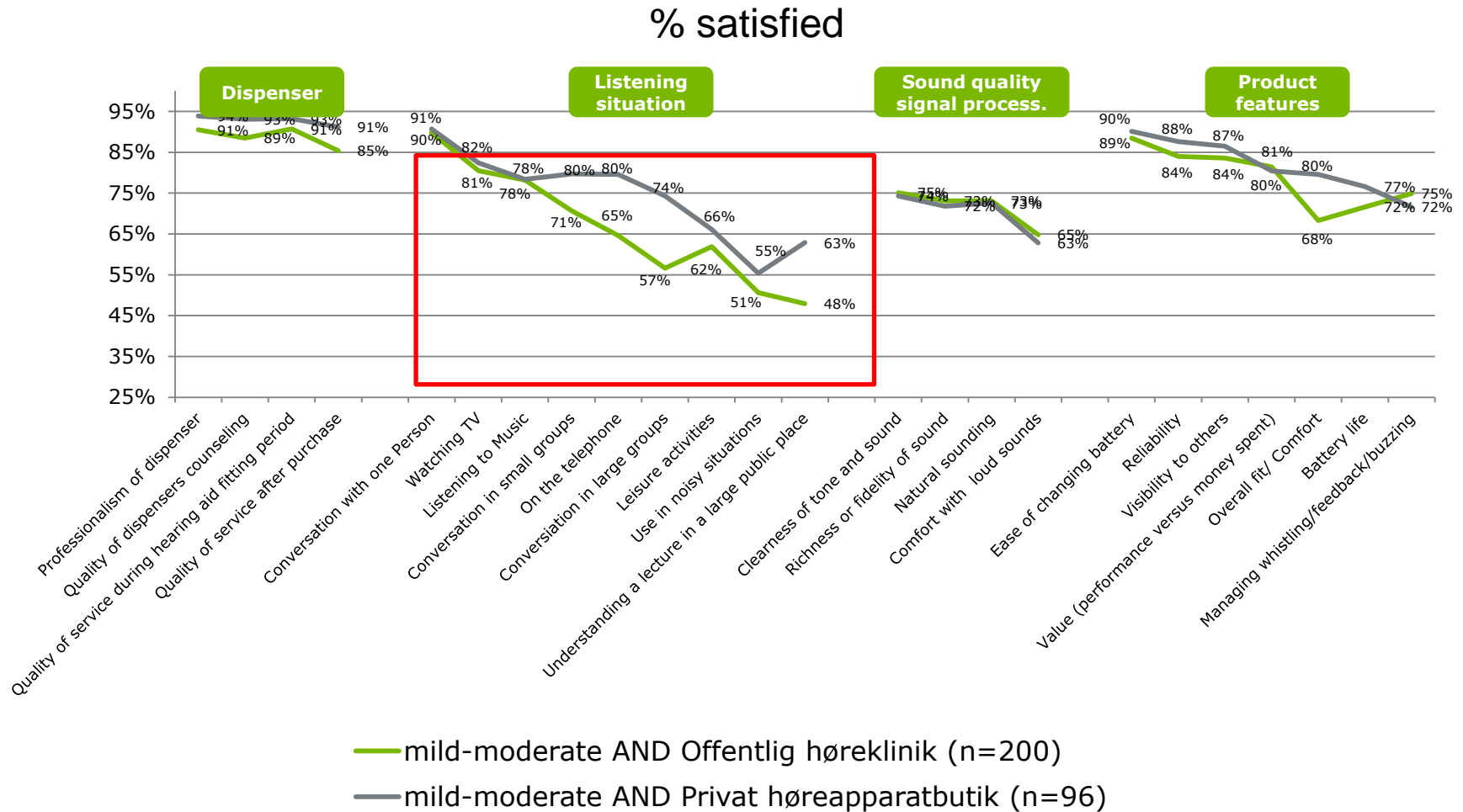
Degree of HL vs. public/private



Overall satisfaction with hearing aids

	Offentlig høreklíník	Privat høreapparatbutik
Mild-moderate hearing loss	70% (n=200)	76% (n=96)
Severe-profound hearing loss	60% (n=198)	76% (n=63)

Satisfaction with current HA: privat høreapparatbutik vs. offentlig høreklirik: **Mild-moderate HL**



Satisfaction with current HA: privat høreapparatbutik vs. offentlig høreklínik: **Severe-profound HL**

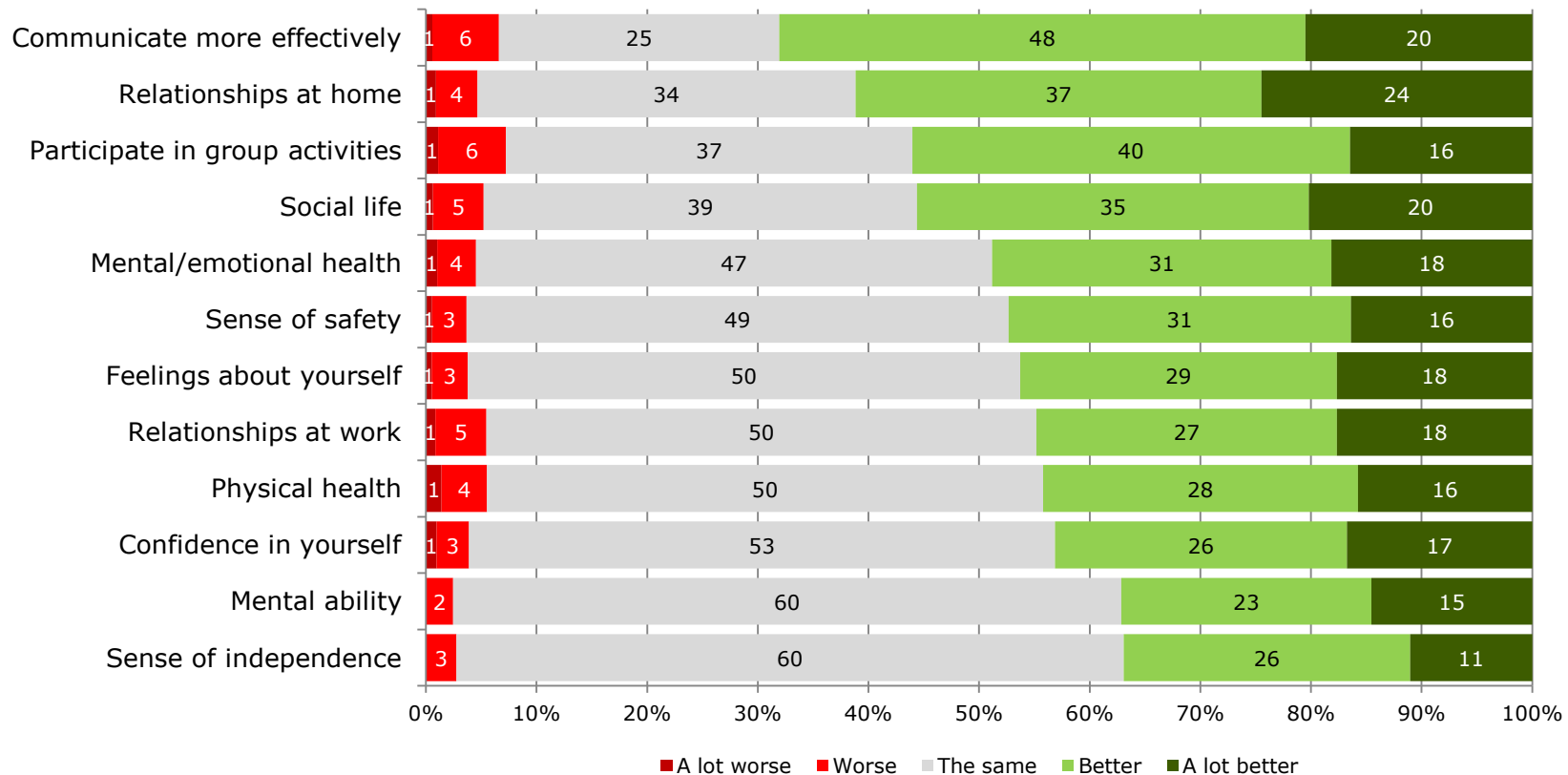


— severe-profound AND Offentlig høreklínik (n=195)
 — severe-profound AND Privat høreapparatbutik (n=63)

Positive impact of HAs



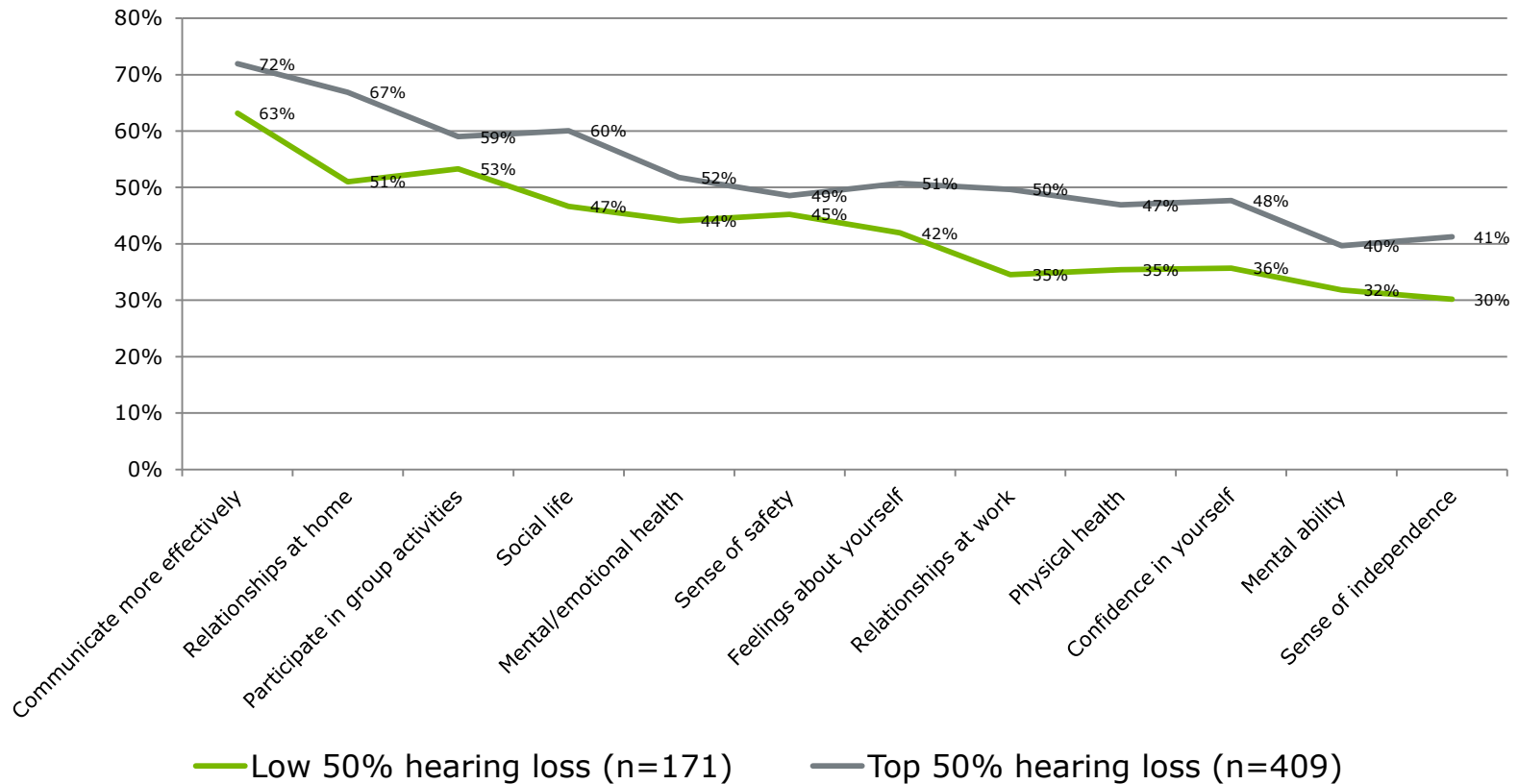
Significant positive impact of HAs on different aspects – especially communication effectiveness, relationships at home and participating in group activities have improved



HA-owner, n=656

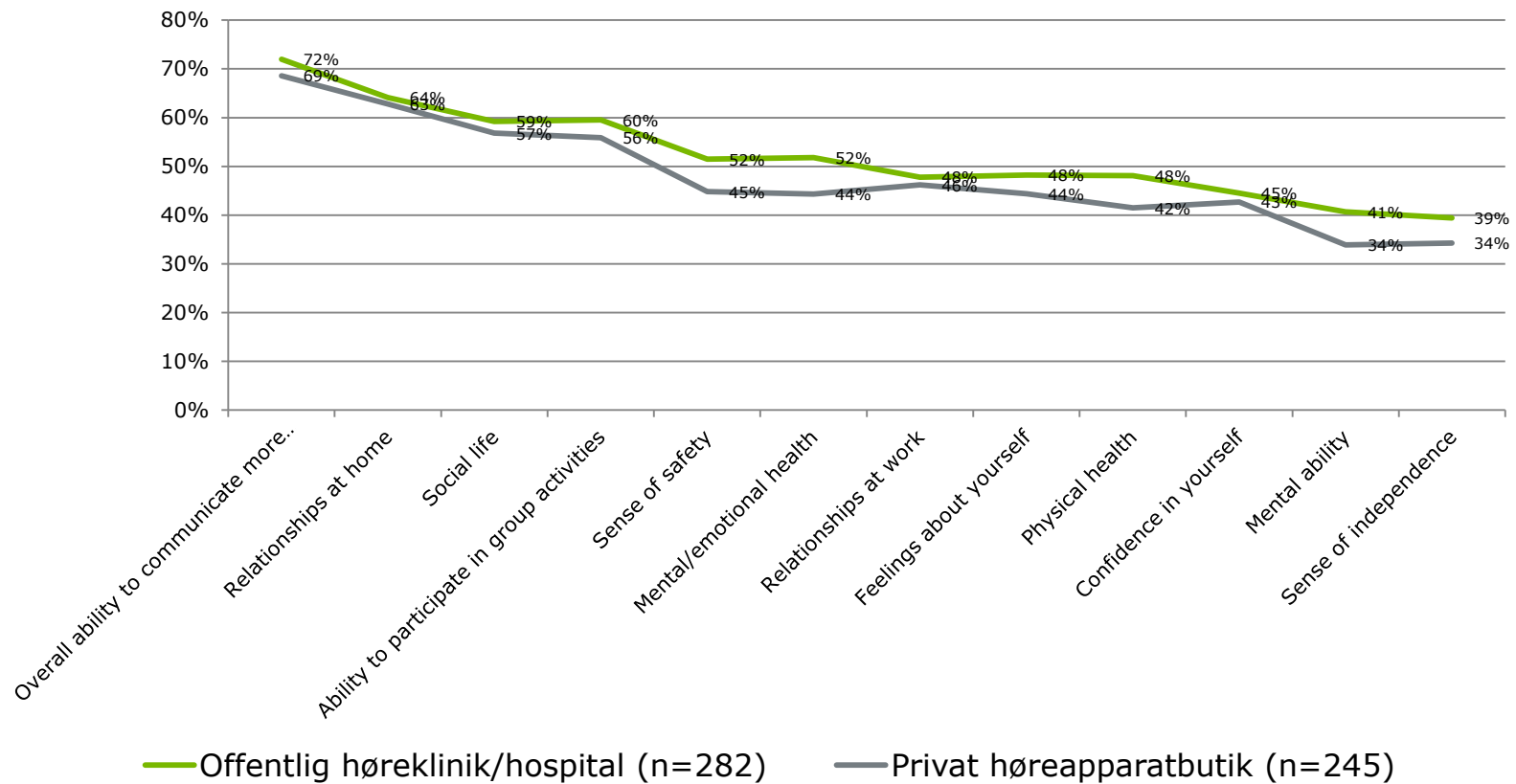
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

% of HA owners feeling better/a lot better



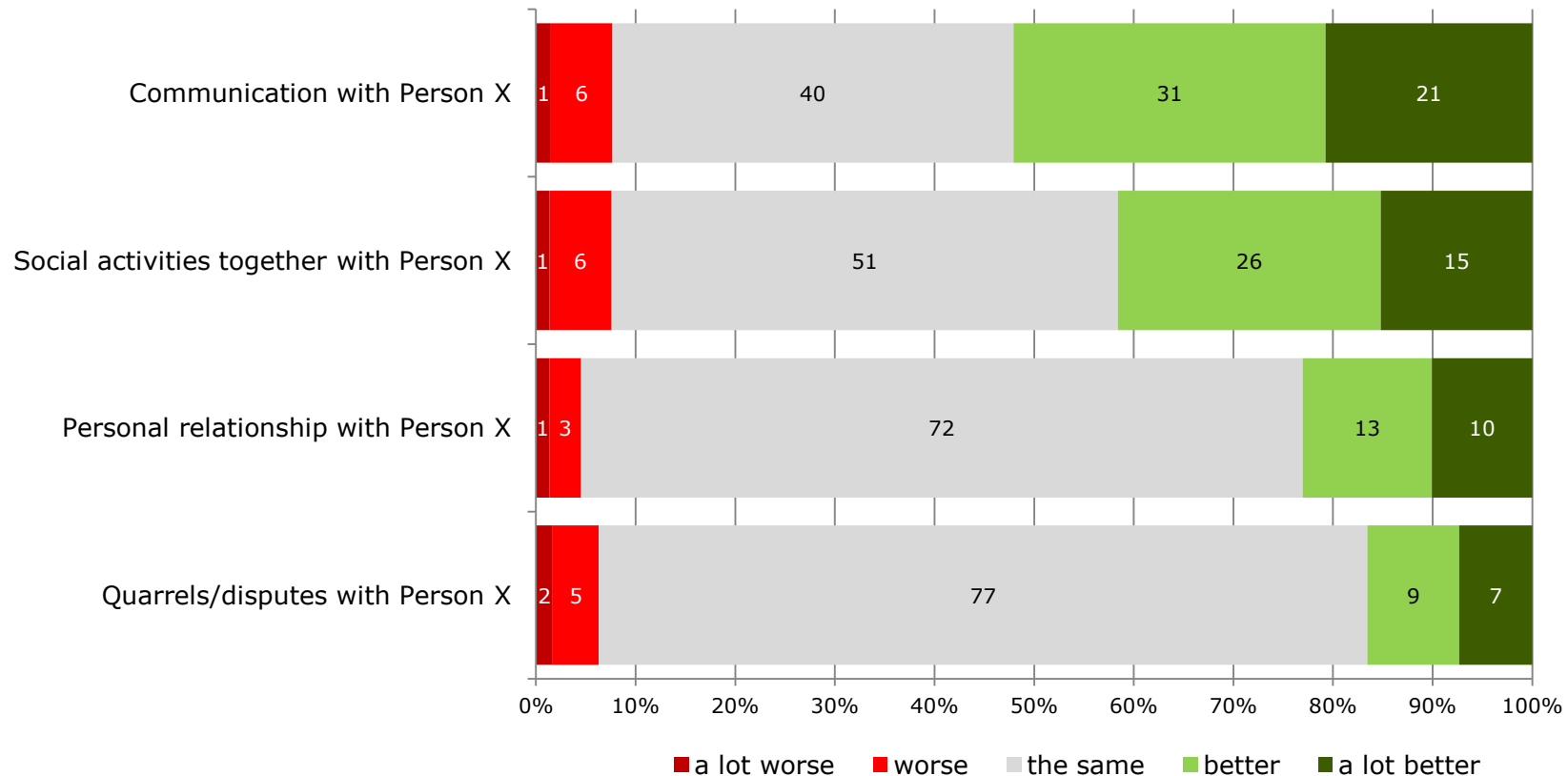
Additional information

% of HA owners feeling better/a lot better



For the significant others, the situation has improved, since person in household/parent is wearing hearing aids

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



Someone in HH / parent have HA, n=654

4. Analysis of hearing impaired non-owners



Reasons for not having a hearing aid

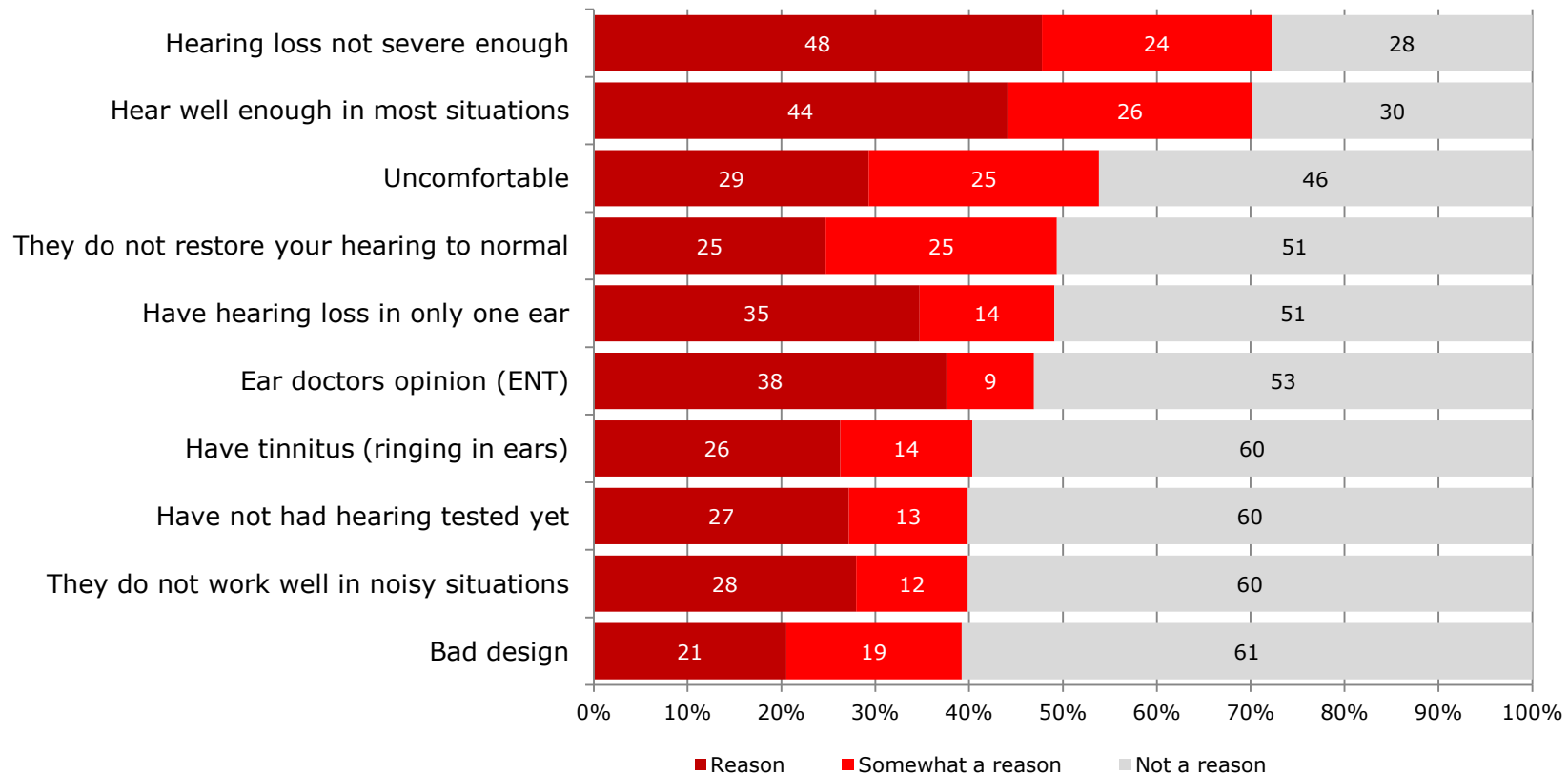


To analyse reasons of non-adoption we look at the Top 50% HL group, as the structure of hearing loss is more similar to that of HA owners

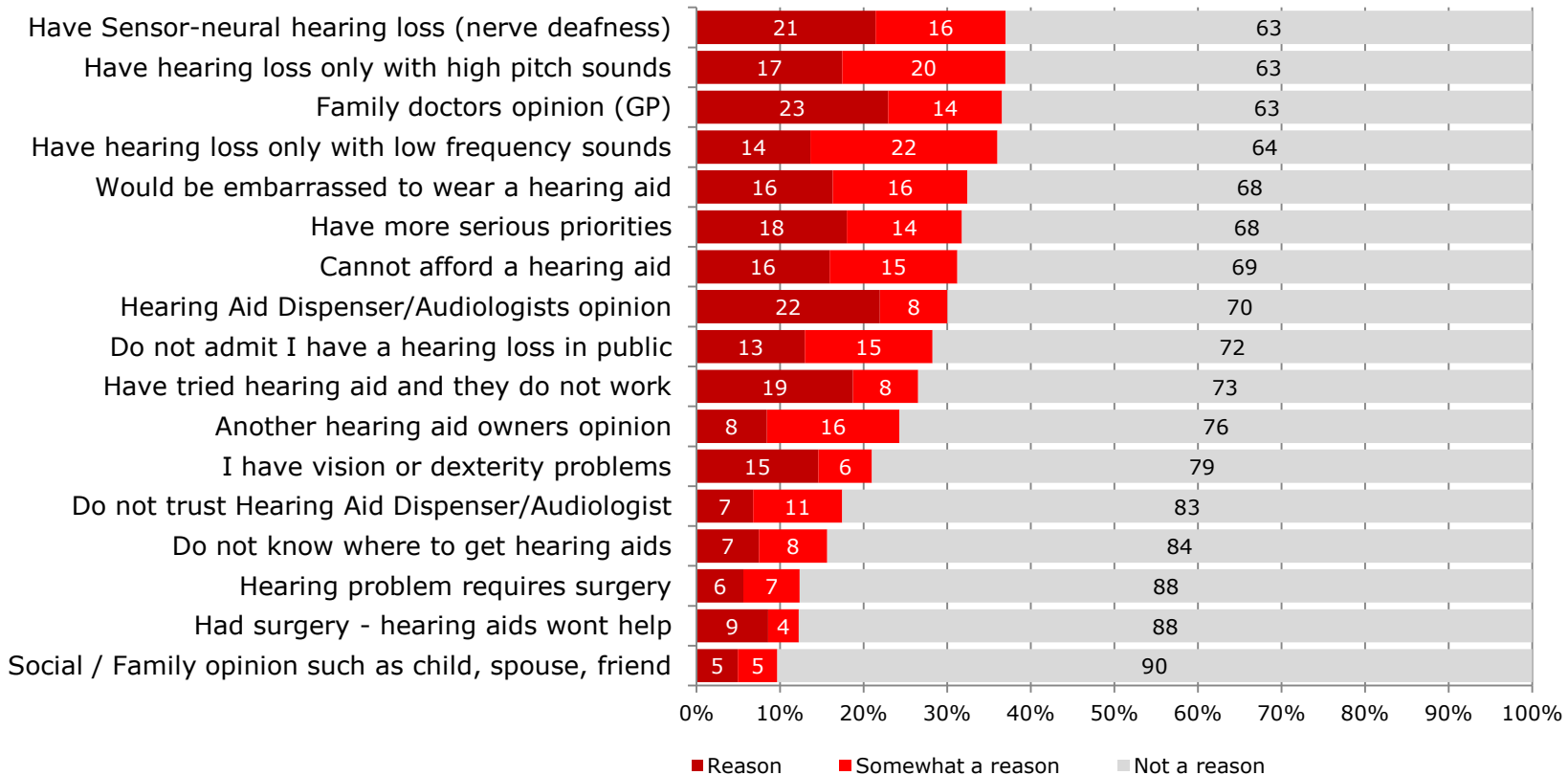
Hearing loss characteristics: Owners compared to non-owners

	% HA Owner (n=656)	%HA-Non- owner Low 50% HL	%HA-Non- owner Top 50% HL
Ears impaired			
Unilateral loss	15%	46%	37%
Bilateral loss	85%	54%	63%
Perceived loss		More similar hearing loss- structure	
Mild	21%	77%	34%
Moderate	48%	18%	51%
Severe	22%	3%	5%
Profound	9%	2%	11%

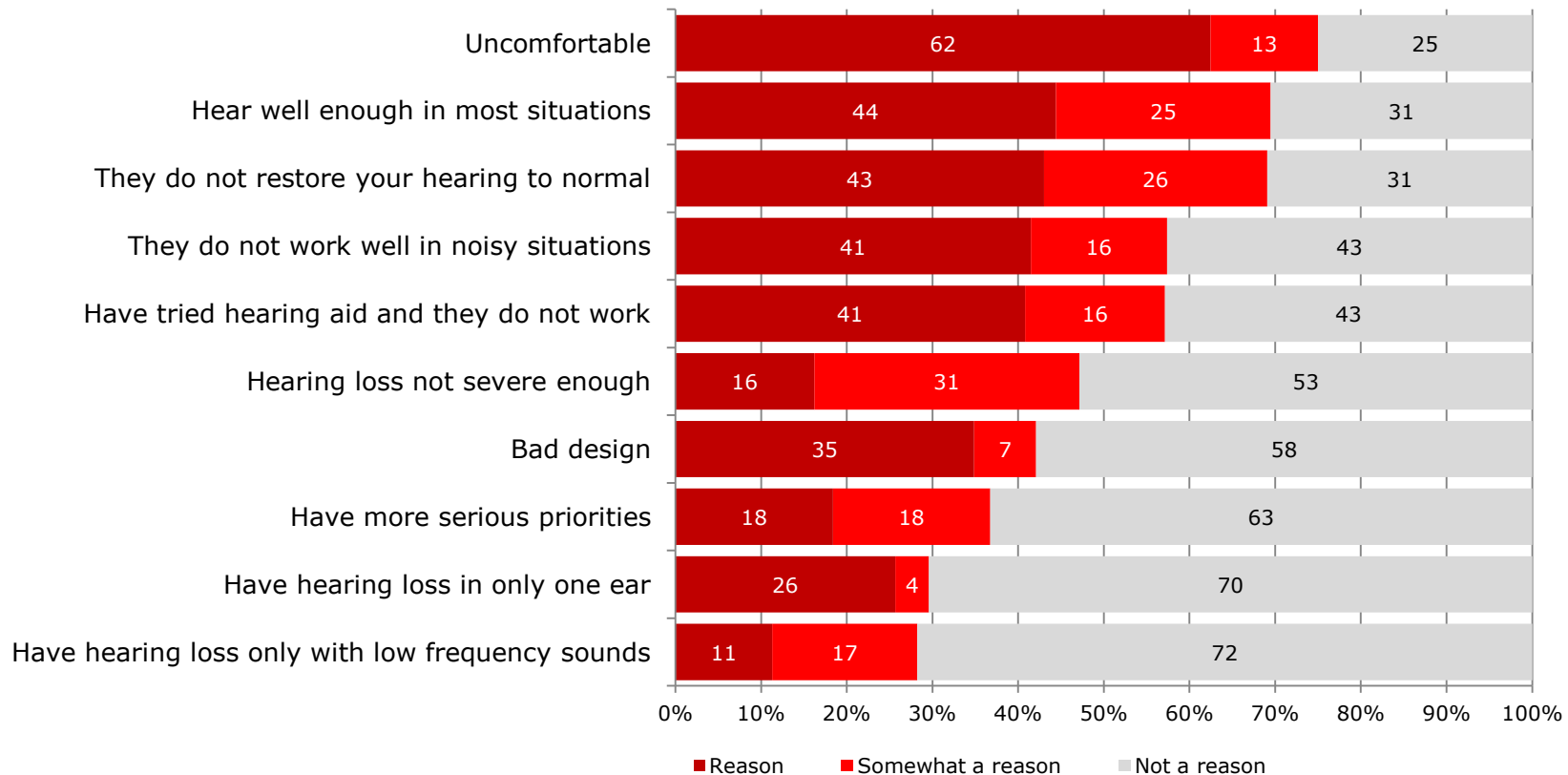
Top 10 reasons for not having a hearing aid (I/II)



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



Top 10 reasons for HA owners NOT using them



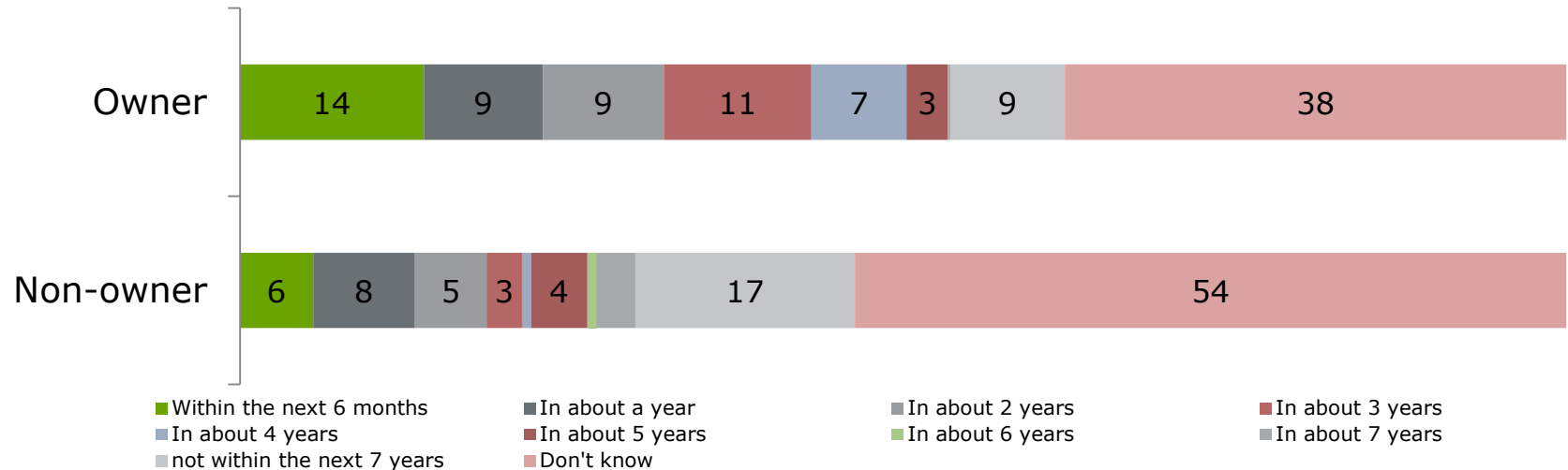
Owners who don't use, n=71

Acquiring intentions

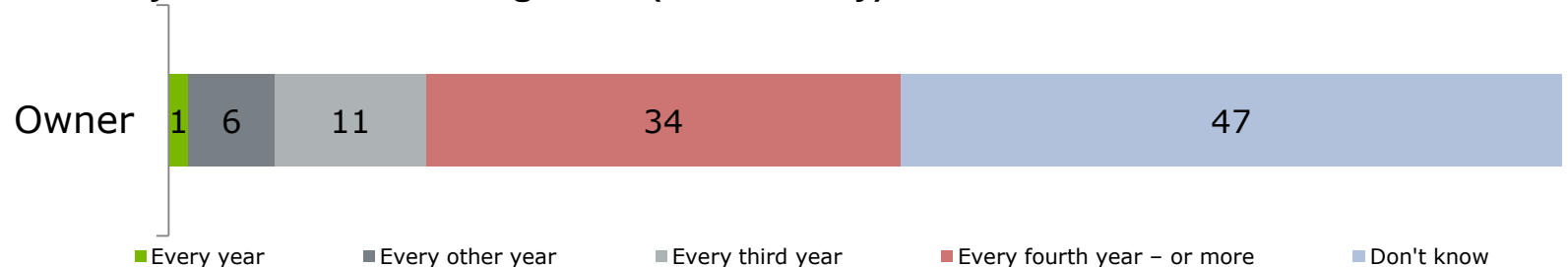


14% of non-owners intend to get a hearing aid within the next year. Reacquiring intention is higher than first-acquiring intention

Acquiring intention hearing impaired in %



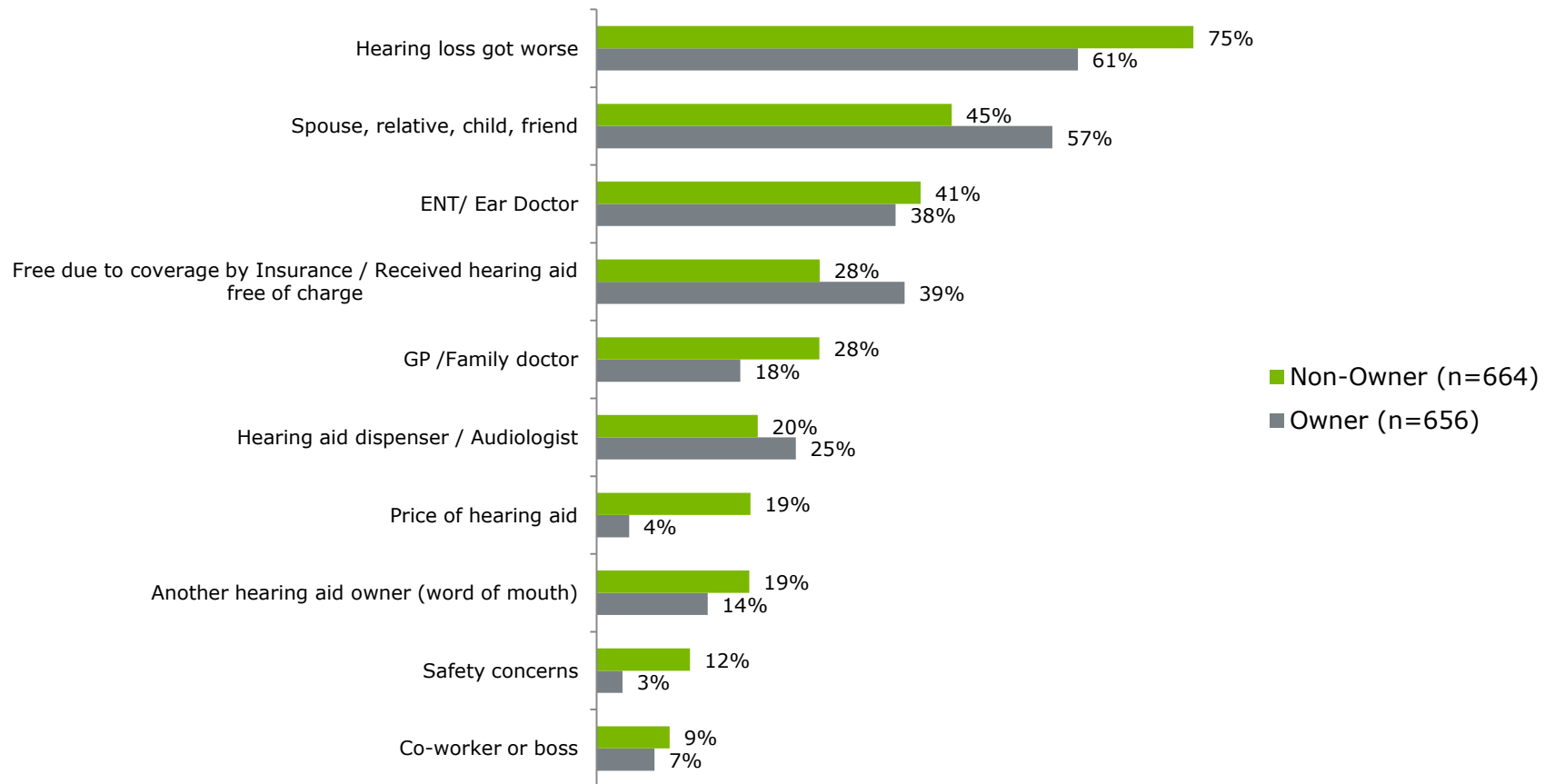
How often do you need new hearing aids? (owners only)



The most important influencing factors are worsening hearing loss, significant others, ENT and the fact that it's for free

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

Non-owner: Think about the option to obtain / purchase a hearing aid. What do you think would influence you to obtain / purchase a hearing aid ?





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APPENDIX



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	6979	11.6%	46.6%	48.7%	58.8%	56.1%
Female	7091	8.4%	49.4%	51.3%	41.2%	43.9%
Age recoded						
1 - 14	2455	3.2%	15.4%	18.8%	9.0%	1.8%
15 - 24	1803	3.5%	38.6%	13.7%	5.2%	3.6%
25 - 34	1633	6.3%	28.2%	12.1%	10.1%	4.3%
35 - 44	1910	5.9%	27.4%	14.2%	11.1%	4.6%
45 - 54	2014	7.6%	31.5%	14.7%	14.2%	7.1%
55 - 64	1745	12.2%	47.9%	12.1%	15.1%	15.2%
65 - 74	1492	22.1%	56.5%	9.2%	19.5%	27.7%
74+	1018	34.9%	67.6%	5.2%	15.6%	35.7%
Type of household						
single household	1823	17.6%	54.6%	11.9%	19.9%	26.1%
Couple, no kids	3378	14.1%	56.7%	22.9%	28.1%	40.2%
Couple with kid(s)	7041	6.4%	34.9%	52.0%	40.1%	23.5%
Single mom/dad with kid(s)	746	6.2%	29.2%	5.5%	4.4%	2.0%
Retirement home, hospital etc.	111	36.0%	62.0%	0.6%	2.1%	3.7%
Other	972	7.2%	43.3%	7.1%	5.4%	4.5%

Demographics (2) Hearing instrument adoption rates and populations

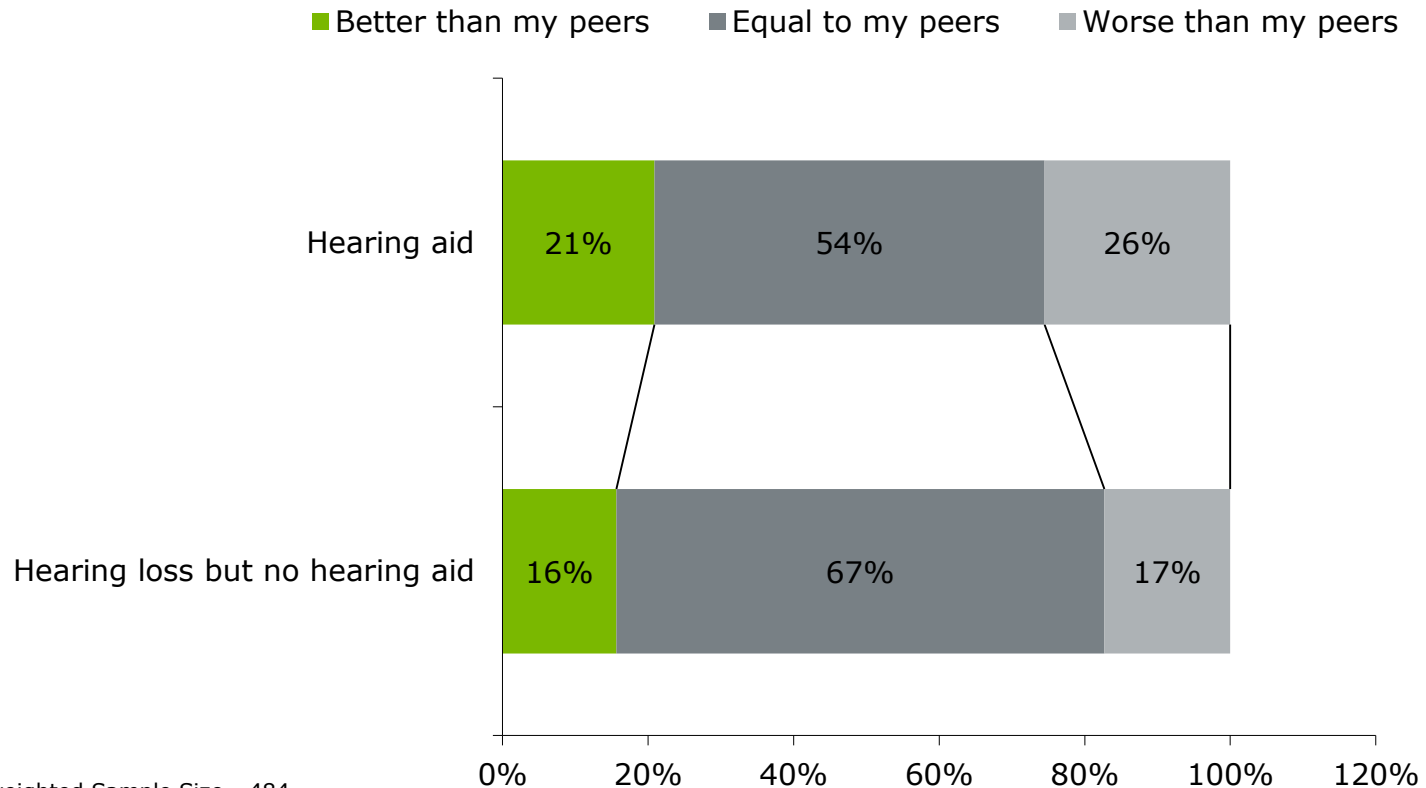
Profiles: Categories add to 100%*

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
Status						
The head of the household (alone or together with someone)	7267	13.2%	49.8%	50.2%	67.4%	74.5%
The spouse of the head of the household	2272	10.6%	49.6%	16.2%	17.0%	18.7%
Daughter/son of head of household	3585	3.0%	15.6%	27.7%	12.6%	2.6%
Other Person	794	6.2%	55.1%	5.9%	3.1%	4.2%
Employment						
Full time employed	5112	7.4%	34.2%	46.7%	37.4%	19.6%
Part time employed	635	8.5%	34.1%	5.7%	5.4%	2.8%
Unemployed / not working	720	7.3%	37.9%	6.6%	4.9%	3.0%
Retired under a disability pension scheme (fully or partly)	201	11.9%	46.5%	1.8%	1.9%	1.7%
Early retired under an early retirement benefit scheme	944	14.0%	56.2%	8.0%	8.7%	11.3%
Retired (at the official retirement age)	2177	28.8%	62.7%	15.3%	35.1%	59.7%
Student / pupil / in training	1664	3.4%	22.0%	15.9%	6.6%	1.9%
Education						
Grundskole	1986	16.8%	55.0%	16.3%	22.6%	27.9%
Ungdomsuddannelse	974	5.3%	41.4%	9.1%	4.6%	3.3%
Erhvervsuddannelse/mesterlære	2801	13.5%	48.9%	23.9%	29.1%	28.2%
Videregående uddannelse, kort - op til 3 år	1806	9.5%	50.7%	16.1%	12.7%	13.2%
Videregående uddannelse, mellemlang - 3-5 år	2310	10.1%	48.6%	20.5%	18.0%	17.2%
Videregående uddannelse, lang - mere end 5 år	981	9.8%	40.2%	8.7%	8.7%	5.9%
Andet	593	9.6%	49.6%	5.3%	4.3%	4.3%

Work competitiveness : 21% of hearing aid owners tend to think they receive a better compensation for their jobs than their peers (16% of hearing impaired non-owners)

Compared to your peers of equal age, education and skill how would you rate the compensation that you receive for the job you perform ?

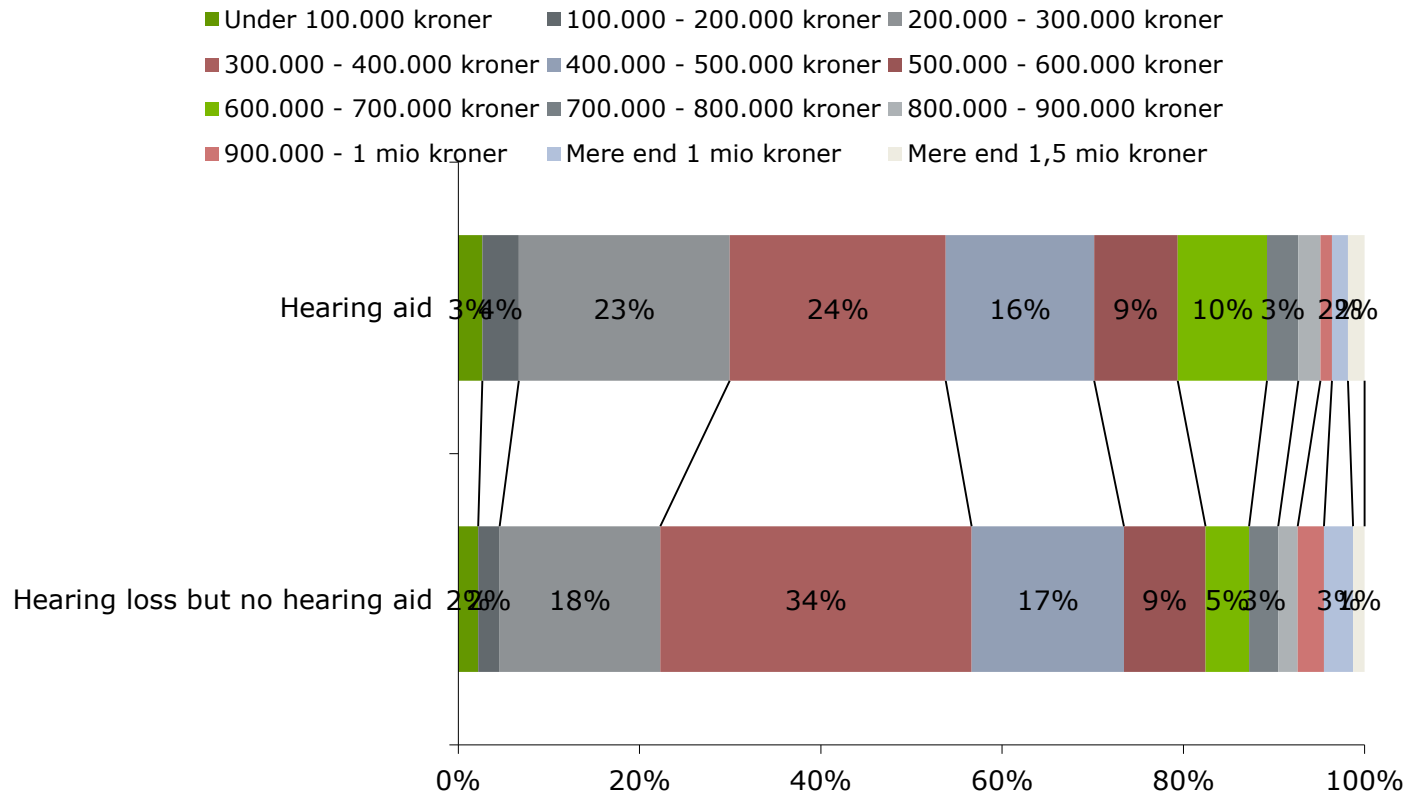
Base: Employed (full/part time)



Work competitiveness: There is no clear difference in income between hearing aid owners and impaired non-owners.

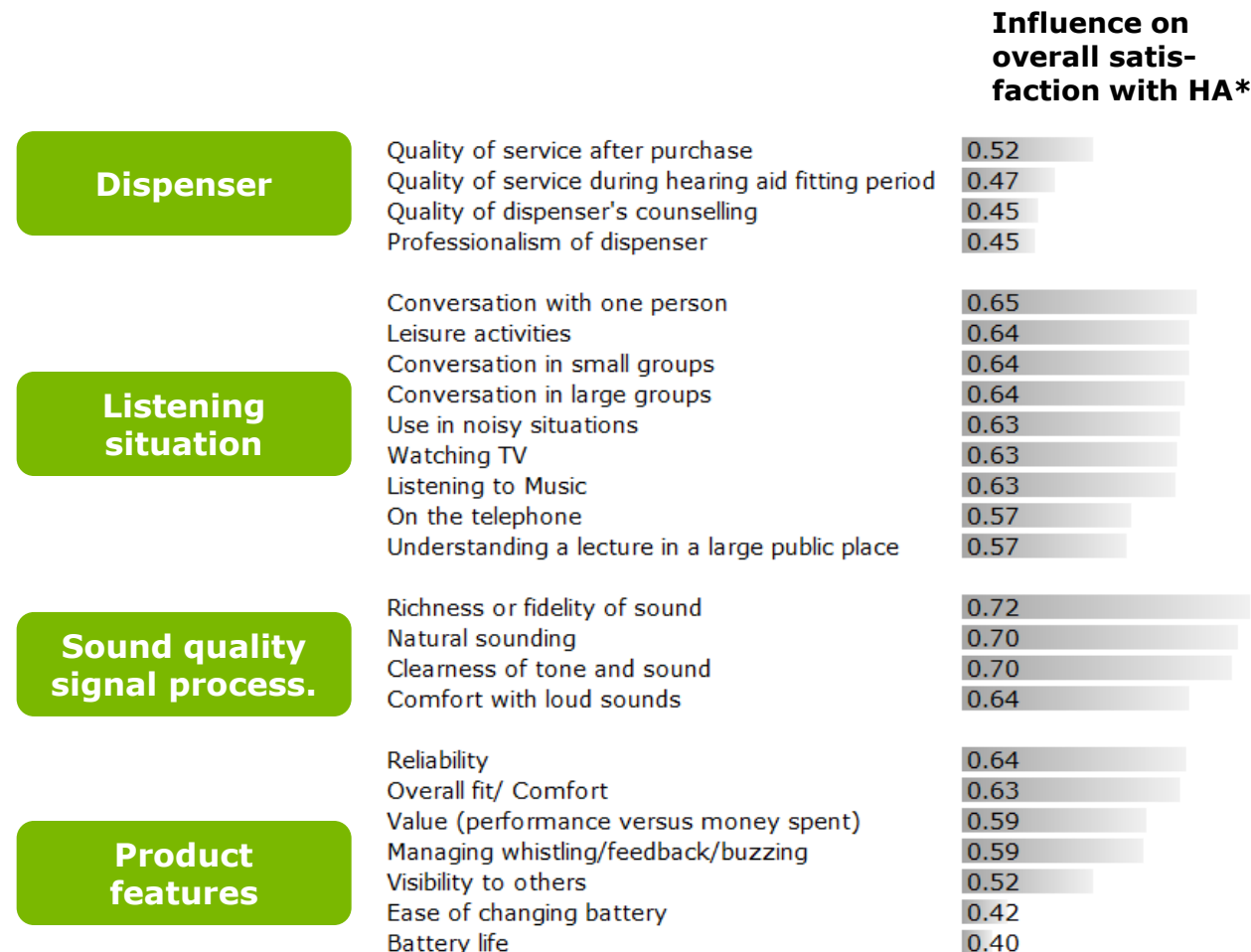
Personal income

Base: Employed (full/part time)



Unweighted Sample Size = 455

Factors influencing satisfaction with current HA: Sound quality/signal processing is 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: richness/fidelity of sound is the most important criterion for satisfaction.