Results

EuroTrak Denmark 2016

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

- EuroTrak DK 2016 was designed and executed by Anovum (Zurich) on behalf of Leverandørforeningen for Høreapparater (LFH), Private Audiologiske Klinikkers Sammenslutning (PAKS), Høreforeningen - and in cooperation with the European Hearing Instrument Manufacturers Association (EHIMA).

- Sample sizes Denmark 2016:
  - Representative sample (sample 1): n=13’434 people
  - Hearing impaired (sample 2): n=1’304 people
    - Hearing impaired non-owners: n= 593 people with hearing loss (HL)
    - HA owners: n= 711 people with hearing aid (HA)

- EuroTrak Denmark 2016 is part of the EuroTrak studies:
Summary
2. Market overview

• Stated hearing loss prevalence
  - Total: 10.3%, 18+: 12.1% (2012: 10.0%, 18+: 11.9%).
  - Binaural hearing loss: HA owners: 83%, HA non-owners: 58%.
  - Hearing Tests: 34% (2012: 38%) had a hearing test in the last 5 years, most tests done by ear doctors.

• Hearing aid adoption rate (HA penetration)
  - Total: 53.0% (2012: 47.8%).
  - Total age group 18+: 54.1 (2012: 50.0%).
  - 77% of HA owners have binaural treatment.

• The route to the hearing aid
  - 68% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 56% got hearing aids recommended from the ENT or family doctor (drop out rate=18% / 2012: 30%).
  - 44% of the GP consultations referred to an ENT.
  - 36% of ENT consultations referred to a audiologist, 49% recommended to get a hearing aid, 20% 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 depressed.
  - Quality of sleep seems to improve if hearing impaired use hearing aids.
Summary

3. Analysis of hearing aid owners

- Hearing aid ownership and usage, accessories and Telecoil
  - 55% (2012: 60%) of all HA owners received 100% 3rd party reimbursement.
  - The average age of the currently owned HAs is 4.2 years (2012: 4.1 years).
  - The median age of hearing aids before replacement is 4 years.
  - On average, HAs are worn 9.1 hours a day (2012: 9.2).
  - 62% of today’s hearing aid owners are aware of their hearing aid brand, 47% would preferably choose the same brand if they would plan to obtain new hearing aids (45% are indifferent).
  - TV Box is the most often owned electronic accessory: 11% of hearing aid owners have one – 43% have heard of it but don’t own one.
  - 31% of hearing aid owners know what Telecoil is; 23% have used it – mainly in a house of worship. Most of those who use it are satisfied.

- Importance of listening situations and satisfaction with HAs
  - 85% of the hearing aid owners say their hearing aid works better than or as expected
  - 71% (2012: 70%) of the HA owners are satisfied with their HAs.
  - The more hours worn per day, the higher the satisfaction.
  - Satisfaction with newer hearing aids is higher than with older hearing aids.
  - Talking at home with family members, talking on a phone and conversations are the most frequent important listening situations.

- Positive impact of HAs
  - Significant positive impact of HAs on different aspects – especially communication, social life and participation in group activities.
  - 94% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes
4. Analysis of hearing impaired non-owners

- **Reasons not to own/use HAs**
  - 27% (2012: 16%) of the hearing impaired without hearing aids think that no third party would pay the hearing aids.
  - The main reasons for not using hearing aids are that people say they hear well enough.
  - 8% who own HAs don’t use them at all (0 hour); 16% use them less than one hour/day (0-1 hour).

- **Social rejection, buying intentions and triggers to buy**
  - 89% of hearing aid owners think people don’t 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.
  - The most important influencing factors for getting hearing aids are worsening hearing loss and that they were free of charge.
  - 15% (2012: 14%) of non-owners intend to get a hearing aid within the next year.
Results

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Detailed Results: Roadmap

New topics for EuroTrak 2016 are highlighted in red

1. Introduction
   - Organisation of EuroTrak 2015
   - 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 and dementia symptoms, **sleep quality**

3. Analysis of hearing aid owners
   - Hearing aid ownership, **awareness of hearing loss before getting hearing aids**, lifetime of hearing aids and usage
   - **Awareness and usage of accessories and Telecoil**
   - Satisfaction with hearing aids and drivers
   - **Importance of listening situations**
   - Positive impact of hearing aids, **quality of life**

4. Analysis of hearing impaired non-owners
   - **Social rejection because of hearing loss compared to the acceptance of hearing aids**
   - Buying intentions and **most important triggers to buy**

5. Appendix
   - Demographics: Hearing instrument adoption rates and populations
1. Introduction
Organisation of EuroTrak 2016

Organisation

• Principal of the project EuroTrak Denmark is the Leverandørforeningen for Høreapparater (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.

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/2016/n=[relevant sample size]”

• LFH member companies 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 panellist pools of more than 40’000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of \( n=13'434 \) 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: \( n=711 \) hearing aid owners and \( n=593 \) 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

% hearing loss prevalence

- Total: 3,2%, 3,2%
- Total 18+: 3,5%, 6,3%
- 74+: 11,9%, 7,6%
- 65-74: 22,1%, 22,5%
- 55-64: 12,2%, 12,9%
- 45-54: 7,6%, 8,1%
- 35-44: 5,9%, 6,2%
- 25-34: 6,3%, 5,7%
- 15-24: 3,5%, 3,2%
- <=14: 3,2%, 3,2%

EuroTrak 2016
Base: 14'0702

EuroTrak 2012
Base: 14'070
Overview hearing loss prevalence and hearing aid adoption

EuroTrak 2016
- Hearing impaired (stated): 10.3%
- Adoption (% of population): 5.5%
- Adoption (% of stated impaired): 53.0%

EuroTrak 2012
- Hearing impaired (stated): 10.0%
- Adoption (% of population): 4.8%
- Adoption (% of stated impaired): 47.8%

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Hearing aid adoption rate Denmark: 53% of hearing impaired have hearing aid(s), 77% of them have binaural treatment

Off: 79%
Priv: 83%
ØNH: 72%
The more severe the hearing loss, the higher the adoption rate

Top 50% = gruppe 4+5+6:
Under 65 år: 45%
Erhvervsaktive: 32%

* 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 characteristics: Owners compared to non-owners

<table>
<thead>
<tr>
<th></th>
<th>HA-Non-owner</th>
<th>HA Owner</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2016: n=593</td>
<td>2016: n=711</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(2012: n=664)</td>
<td>(2012 n= 656)</td>
<td></td>
</tr>
</tbody>
</table>

### Ears impaired (stated)

<table>
<thead>
<tr>
<th></th>
<th>HA-Non-owner</th>
<th>HA Owner</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unilateral loss</td>
<td>42% (42%)</td>
<td>17% (15%)</td>
<td>36% (27%)</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>58% (58%)</td>
<td>83% (85%)</td>
<td>67% (60%)</td>
</tr>
</tbody>
</table>

### Perceived loss

<table>
<thead>
<tr>
<th></th>
<th>HA-Non-owner</th>
<th>HA Owner</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mild</td>
<td>69% (68%)</td>
<td>24% (21%)</td>
<td>31% (23%)</td>
</tr>
<tr>
<td>Moderate</td>
<td>23% (24%)</td>
<td>48% (48%)</td>
<td>73% (65%)</td>
</tr>
<tr>
<td>Severe</td>
<td>5% (4%)</td>
<td>21% (22%)</td>
<td>82% (78%*)</td>
</tr>
<tr>
<td>Profound</td>
<td>3% (4%)</td>
<td>8% (9%)</td>
<td></td>
</tr>
</tbody>
</table>

n’s are unweighted whereas the shown results are weighted

* combined “severe” and “profound” because n is too small
Hearing tests and where hearing is tested
Hearing Tests: 34% (2012: 38%) had a hearing test in the last 5 years, most tests done by (ear) 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

Where/how was your hearing tested?

- Ear doctor (ENT): 40%
- Family doctor: 20%
- Hospital (audiologist): 14%
- Hearing Aid Dispenser/Audiologist: 14%
- Online test: 0%
- Test on a smartphone App: 0%
- Other: 13%
- Don't know: 6%

Base=9'536

Base= 3'492
The route to the hearing aid:
Sources of information and drop-out rates
Doctors are the most important source of information followed by the internet.

Where did you gather information about hearing aids? Please check all that apply.

- Ear doctor (ENT)
- Private clinic
- Family doctor
- Internet research combined
  - Conversations with friends, relatives already fitted with a hearing aid
  - Articles in magazines or newspapers
  - Internet research: websites of hearing aid clinics
  - Internet research: websites of hearing aids manufacturers
  - Internet research: other websites, google...
  - Print ads received in your mailbox
- Other
- I did not gather information about hearing aids

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Of those who discussed the hearing loss with a doctor, 52% talked to an ENT first and 48% talked to the 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 ENT specialist?

- **Total n=821**
  - Ear doctor (ENT specialist): 52%
  - Your family doctor: 48%

- **Hearing aid (n=557)**
  - Ear doctor (ENT specialist): 54%
  - Your family doctor: 46%

- **Hearing loss but no hearing aid (n=264)**
  - Ear doctor (ENT specialist): 47%
  - Your family doctor: 53%
The route to the hearing aid: Compared to 2012 drop out 2 was reduced

Base: n=1'304
Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*

Low 50% hearing loss*

* Construction of 6-groups: A factor analysis was performed to identify one factor “degree of hearing loss”. The following questions were included in the factor:
  - Number of ears impaired (one or two)
  - Stated hearing loss (Mild to Profound)
  - Scores on 6 APHAB-EC – like questions (Scaled 1-5)
  - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

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

Base: n=1'304
The route to the hearing aid: GP/Family doctor
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

<table>
<thead>
<tr>
<th></th>
<th>Total hearing impaired</th>
<th>HA owner</th>
<th>Hearing impaired non-owners</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Discussed</td>
<td>43%</td>
<td>51%</td>
<td>33%</td>
</tr>
<tr>
<td>% Discussed</td>
<td>45%</td>
<td>52%</td>
<td>40%</td>
</tr>
</tbody>
</table>

What did he/she recommend?

HA owner (Base: 352)
- Referred to a hearing aid dispenser / audiologist: 47%
- Referred to an ear doctor (ENT): 40%
- Recommended to get a hearing aid: 20%
- Recommended no further action: 3%

Impaired non-owner (Base: 182)
- Referred to a hearing aid dispenser / audiologist: 27%
- Referred to an ear doctor (ENT): 52%
- Recommended to get a hearing aid: 5%
- Recommended no further action: 19%
The route to the hearing aid: ENT
Have you discussed your hearing problem with an ear doctor (ENT)?

% Discussed with ENT

- Total hearing impaired: 59% discussed with ENT.
- HA owner (Base: 515): 76% discussed with ENT.
- Impaired non-owner (Base: 222): 39% discussed with ENT.

What did he/she recommend?

- HA owner (Base: 515):
  - Did prescribe a hearing aid: 63%
  - Referred to a hearing aid dispenser / audiologist: 40%
  - Recommended no further action: 4%

- Impaired non-owner (Base: 222):
  - Did prescribe a hearing aid: 18%
  - Referred to a hearing aid dispenser / audiologist: 27%
  - Recommended no further action: 57%

EuroTrak 2016
Base: 1'304

EuroTrak 2012
Base: 1'320

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Denmark: country specific questions

Var der mulighed for at få høreapparatbehandling hos din ØNH-læge? [Was there an opportunity for HA treatment from your ear doctor?]

- Yes: 32%
- No: 29%
- don't know: 40%

Tilbød ØNH-lægen udlevering direkte hos sig? [Did ear doctor offer to dispense directly with him?]

- Yes: 39%
- No: 61%

Hvilke andre muligheder præsenterede ØNH-lægen dig for: [What other options did the ear doctor present you:]

- Offentlig behandling på sygehus: 45%
- Offentlig behandling hos ØNH-lægen: 43%
- Privat behandling hos ØNH-lægen: 21%
- Privat behandling hos anden privat behandler: 12%

Base: N=737
Har du fået mulighed for at teste i en længere periode før du valgte dit høreapparat? [Have you had the opportunity to test for a long period before you chose your hearing aid?]

Mean 7.6
The route to the hearing aid: Audiologist

Have you discussed your hearing problem with a Hearing Aid Dispenser/Audiologist? (public and private)

<table>
<thead>
<tr>
<th>% Discussed with Audiologist</th>
<th>What did he/she recommend?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total hearing impaired</td>
<td>HA owner (Base: 538)</td>
</tr>
<tr>
<td></td>
<td>Recommended to get a hearing aid: 96%</td>
</tr>
<tr>
<td></td>
<td>Recommended not to get a hearing aid: 4%</td>
</tr>
<tr>
<td>HA owner</td>
<td>Impaired non-owner (Base: 159)</td>
</tr>
<tr>
<td></td>
<td>Recommended to get a hearing aid: 46%</td>
</tr>
<tr>
<td></td>
<td>Recommended not to get a hearing aid: 54%</td>
</tr>
</tbody>
</table>

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EuroTrak 2016 Base: 1'304
EuroTrak 2012 Base: 1'320
Recommendations by profession

- **GP (N=534)**: 44% Referred to an ear doctor (ENT), 40% Referred to a hearing aid dispenser / audiologist, 15% Recommended to get a hearing aid, 15% Recommended no further action.
- **ENT (N=737)**: 36% Referred to an ear doctor (ENT), 49% Referred to a hearing aid dispenser / audiologist, 20% Recommended to get a hearing aid, 9% Recommended no further action.
- **Audiologist (N=697)**: 85% Referred to an ear doctor (ENT), 15% Recommended no further action.
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms, sleep quality
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?

- 60% Of significant use
- 31% Of some use
- 10% Of no use

Base: N=210
**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.

![Survey Results]

Base: Hearing loss, no hearing aid =361/ hearing aid n=383
**General health problems:** Hearing aid owners have a lower risk of being depressive (PHQ-2 Screening) 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

![Depression Symptoms Chart](chart.png)

### Dementia symptom:
**Getting more forgetful in the last year?**

![Dementia Symptoms Chart](chart.png)

*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 (Top 50% hearing loss*), hearing aid owners feel less exhausted in the evenings.

In the evenings I often feel physically exhausted

<table>
<thead>
<tr>
<th></th>
<th>Disagree strongly</th>
<th>Rather disagree</th>
<th>Neutral</th>
<th>Rather agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing aid</td>
<td>21%</td>
<td>19%</td>
<td>27%</td>
<td>23%</td>
<td>9%</td>
</tr>
<tr>
<td>Top 50% hearing loss, no hearing aid</td>
<td>15%</td>
<td>11%</td>
<td>26%</td>
<td>33%</td>
<td>15%</td>
</tr>
</tbody>
</table>

In the evenings I often feel mentally exhausted

<table>
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<th>Rather disagree</th>
<th>Neutral</th>
<th>Rather agree</th>
<th>Strongly agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing aid</td>
<td>30%</td>
<td>25%</td>
<td>22%</td>
<td>17%</td>
<td>7%</td>
</tr>
<tr>
<td>Top 50% hearing loss, no hearing aid</td>
<td>24%</td>
<td>17%</td>
<td>20%</td>
<td>27%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Base: Top 50% n=102 / hearing aid n=516

*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?

<table>
<thead>
<tr>
<th>Top 50% hearing loss, no hearing aid (n=104)</th>
<th>Hearing aid (n=530)</th>
</tr>
</thead>
<tbody>
<tr>
<td>61%</td>
<td>32%</td>
</tr>
<tr>
<td>39%</td>
<td>68%</td>
</tr>
</tbody>
</table>

No

Yes
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 and moderate hearing loss

<table>
<thead>
<tr>
<th>Stated hearing loss</th>
<th>(% of impaired population*)</th>
<th>Adoption rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profound</td>
<td>(6%)</td>
<td>2015</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1%</td>
</tr>
<tr>
<td>Severe</td>
<td>(14%)</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>2%</td>
</tr>
<tr>
<td>Moderate</td>
<td>(37%)</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>10%</td>
</tr>
<tr>
<td>Mild</td>
<td>(44%)</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>29%</td>
</tr>
</tbody>
</table>

Base: n=1'304
Sums can differ from 100% due to rounding
* combined “severe” and “profound” because n is too small

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57% of the currently owned HAs were fitted in 2012 or later

Age of currently owned HAs (Mean):
2016: 4.2 years
2012: 4.1 years
On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 4-6 years before they are being replaced.

Current HAs = first HAs?

- 2012: 48%
  - Yes: 50%
  - No: 50%

How many years did you own your previous HAs?

- 12%: 1-3 years
- 79%: 4-6 years
- 4%: 7-10 years
- 6%: 11 years or longer

Base: n=323

Age of HA before it has been replaced:
- 2016: 4 years (median)
- 2012: 4 years (median)

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

- 26%: 1 year
- 24%: 2 years
- 18%: 3 years
- 17%: 4-6 years
- 15%: more than 6 years

Base: n=596
Compared to 2012 less hearing aids are being paid completely by a third party.

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

- Yes, completely (2012: 60%)
- Yes, partly (2012: 31%)
- No (2012: 6%)
- don't know (2012: 3%)

**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, ...)

- Yes (2012: 36%)
- No (2012: 16%)
- don't know (2012: 48%)

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Hvor mange forskellige HA fik du mulighed for at teste, før du valgte dit høreapparat? [How many different brands of hearing aids were you offered to test before you decided?]

- 6% 1
- 33% 2-3
- 61% more than 3

Tænk tilbage på der, hvor du fik dine nuværende høreapparater: hvor mange besøg har du haft der, før tilpasningen var færdig? Tæl alle besøg, eller lav et godt gæt.

[Think back to where you got your current hearing aids: how many visits have you had there before the adjustment was finished?]

- 11% 1
- 34% 2
- 29% 3
- 13% 4
- 13% 5
- 9% 6
- 8% 7
- 7% 8
- 6% 9
- 4% 10 or more

->87% had 1-4 visits

[if HA purchased in the private sector]

Blev du informeret om muligheden for at få gratis høreapparater på en offentlig høreklinik?
[Were you informed about the possibility of getting free hearing aids at a public hearing clinic?]

- 70% Yes
- 30% No
On average, HAs are worn 9.1 hours a day

How many hours a day are HA worn? (cum. %)

HA worn:
2016: Mean: 9.1 hours/day
2012: Mean: 9.2 hours/day

In the drawer (0 hours):
All HA owners: 8%
HA from offentlig høreklinik (n=298) 12%
HA from privat høreapparatbutik (n=324) 3%

HA-owner:
2016: n=711
2012: n=656
62% of today’s hearing aid owners are aware of their hearing aid brand

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

- Yes, I know it by heart: 62%
- No, but I could find out: 26%
- No, and can’t find out: 12%

In case you plan to obtain new hearing aid(s), what brand would you choose?

- Preferably from the same brand you currently own: 45%
- Preferably from a different brand than you currently own: 8%
- Indifferent, could be any brand: 47%

Base: N=711 / 623
78% 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?

<table>
<thead>
<tr>
<th>Year</th>
<th>Never</th>
<th>Once</th>
<th>2-3 times</th>
<th>4-5 times</th>
<th>More often</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>56%</td>
<td>22%</td>
<td>16%</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>2012</td>
<td>55%</td>
<td>24%</td>
<td>15%</td>
<td>4%</td>
<td>2%</td>
</tr>
</tbody>
</table>

HA-owner:
2016: n=711
2012: n=656
Awareness and usage of accessories and Telecoil
TV Box is the most often owned electronic accessory: 11% of hearing aid owners have one – 43% have heard of it but don’t own one.

Which of the following accessories have you heard of and which ones do you own?

- TV Box connected to the tv set to stream audio to your hearing aid: 46% own one, 43% have heard of it, 11% never heard of it.
- Audio streamer to connect my hearing aids to other devices like cell phones, mp3 players, tv sets, etc: 52% own one, 37% have heard of it, 11% never heard of it.
- Combined device - audio streamer and remote control in one device: 53% own one, 38% have heard of it, 9% never heard of it.
- Additional microphone for conversations with one person, conversations in a group etc: 55% own one, 40% have heard of it, 5% never heard of it.
- Phone clip, plugged into the mobile phone to stream calls to the hearing aid: 57% own one, 36% have heard of it, 7% never heard of it.

Base: N=711
31% of hearing aid owners know what Telecoil, 23% have also used it – mainly in a house of worship, theatre or auditorium or even at home. Most of those who use it are satisfied.

Have you seen this logo before?
- Yes, and I know what it stands for: 31%
- Yes, but I don't know what it stands for: 16%
- No, have never seen this: 52%

On what type of venues have you used hearing aids in a hearing loop (Telecoil)?
- House of worship: 57%
- Theater, auditorium: 50%
- Home: 31%
- Conference room: 22%
- School, university: 12%
- Airport, train station: 7%
- Court room: 5%
- Drive thru, ticket window, bank counter: 5%

Are your hearing aids equipped with Telecoil?
- Yes, and I have already used Telecoil: 23%
- Yes, but have never used it: 34%
- No: 13%
- I don't know: 29%

HA-owner, n=711

How satisfied are you with the use of Telecoil overall?
- Very dissatisfied: 3%
- Dissatisfied: 5%
- Somewhat dissatisfied: 16%
- Neutral: 33%
- Somewhat satisfied: 25%
- Satisfied: 16%

HA-owner, who have used Telecoil, n=141

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Satisfaction with hearing aids and drivers
85% 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?

- 26% hearing aids work better than I expected
- 59% hearing aids work as I expected
- 15% hearing aids work worse than I expected

Base: N=711

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Overall satisfaction with HA is stable around 70%

<table>
<thead>
<tr>
<th>% Satisfied</th>
<th>2016</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total HA-user (n=711)</td>
<td>71%</td>
<td>70%</td>
</tr>
<tr>
<td>BTE (n=437)</td>
<td>77%</td>
<td>75%</td>
</tr>
<tr>
<td>ITE (n=62)</td>
<td>54%</td>
<td>65%</td>
</tr>
<tr>
<td>ITC (n=185)</td>
<td>68%</td>
<td>64%</td>
</tr>
<tr>
<td>up to two years old (n=157)</td>
<td>76%</td>
<td>77%</td>
</tr>
<tr>
<td>older than 2 years (n=533)</td>
<td>71%</td>
<td>66%</td>
</tr>
<tr>
<td>HA worn up to 4 hrs/day (n=163)</td>
<td>49%</td>
<td>36%</td>
</tr>
<tr>
<td>HA worn 4-8 hrs/day (n=160)</td>
<td>70%</td>
<td>79%</td>
</tr>
<tr>
<td>HA worn more than 8 hrs/day (n=388)</td>
<td>81%</td>
<td>82%</td>
</tr>
<tr>
<td>Offentlig høreklinik (n=298)</td>
<td>74%</td>
<td>68%</td>
</tr>
<tr>
<td>Privat høreapparatbutik (N=234)</td>
<td>75%</td>
<td>75%</td>
</tr>
<tr>
<td>Ørelægen (N=64)</td>
<td>59%</td>
<td>78%*</td>
</tr>
</tbody>
</table>

*low sample size

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## Overall Satisfaction with HA: Country comparison

<table>
<thead>
<tr>
<th>Country</th>
<th>2012</th>
<th>2015/16</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>80%</td>
<td>84%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>84%</td>
<td>81%</td>
</tr>
<tr>
<td>UK</td>
<td>72%</td>
<td>70%</td>
</tr>
<tr>
<td>Denmark</td>
<td>70%</td>
<td>71%</td>
</tr>
<tr>
<td>Norway</td>
<td>72%</td>
<td>79%</td>
</tr>
<tr>
<td>Italy</td>
<td>70%</td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td>36%</td>
<td>39%</td>
</tr>
</tbody>
</table>

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# Satisfaction with current hearing aids

**Dispenser**
- Quality of service during hearing aid fitting period
  - 8% dissatisfied
  - 7% dissatisfied
  - 7% dissatisfied
  - 9% dissatisfied
  - 19% dissatisfied
- Quality of dispensers counseling
  - 8% dissatisfied
  - 7% dissatisfied
  - 7% dissatisfied
  - 9% dissatisfied
  - 19% dissatisfied
- Professionalism of dispenser
  - 8% dissatisfied
  - 7% dissatisfied
  - 7% dissatisfied
  - 9% dissatisfied
  - 19% dissatisfied
- Quality of service after purchase
  - 8% dissatisfied
  - 7% dissatisfied
  - 7% dissatisfied
  - 9% dissatisfied
  - 19% dissatisfied
- Info about Comm. Center, municipality, Hearing Soc.
  - 86% satisfied
  - 85% satisfied
  - 85% satisfied
  - 84% satisfied
  - 69% satisfied

**Sound quality signal process.**
- Clarity of tone and sound
  - 10% dissatisfied
  - 13% dissatisfied
  - 13% dissatisfied
  - 15% dissatisfied
  - 19% dissatisfied
- Natural sounding
  - 10% dissatisfied
  - 13% dissatisfied
  - 13% dissatisfied
  - 15% dissatisfied
  - 19% dissatisfied
- Richness or fidelity of sound
  - 10% dissatisfied
  - 13% dissatisfied
  - 13% dissatisfied
  - 15% dissatisfied
  - 19% dissatisfied
- Comfort with loud sounds
  - 8% dissatisfied
  - 9% dissatisfied
  - 10% dissatisfied
  - 12% dissatisfied
  - 14% dissatisfied

**Product features**
- Ease of changing battery
  - 8% dissatisfied
  - 9% dissatisfied
  - 10% dissatisfied
  - 12% dissatisfied
  - 13% dissatisfied
- Visibility to others
  - 8% dissatisfied
  - 9% dissatisfied
  - 10% dissatisfied
  - 12% dissatisfied
  - 13% dissatisfied
- Reliability
  - 8% dissatisfied
  - 9% dissatisfied
  - 10% dissatisfied
  - 12% dissatisfied
  - 13% dissatisfied
- Overall fit/Comfort
  - 8% dissatisfied
  - 9% dissatisfied
  - 10% dissatisfied
  - 12% dissatisfied
  - 13% dissatisfied
- Value (performance versus money spent)
  - 8% dissatisfied
  - 9% dissatisfied
  - 10% dissatisfied
  - 12% dissatisfied
  - 13% dissatisfied
- Battery life
  - 8% dissatisfied
  - 9% dissatisfied
  - 10% dissatisfied
  - 12% dissatisfied
  - 13% dissatisfied
- Managing whistling/feedback/buzzing
  - 8% dissatisfied
  - 9% dissatisfied
  - 10% dissatisfied
  - 12% dissatisfied
  - 14% dissatisfied

---

* % of satisfied HA owners compared to EuroTrak 2012

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Satisfaction with current hearing aids

Listening situation

- Conversation with one Person: 84%
- When riding in a car: 79%
- At home with family members: 76%
- In a store, when shopping: 75%
- Listening to Music: 75%
- At a movie theater: 74%
- Outdoors: 74%
- When talking to children: 73%
- Watching TV: 73%
- Conversation in small groups: 73%
- In the workplace: 72%
- On the telephone: 71%
- ** In a larger lecture hall (e.g., theater, concert hall,..): 69%
- In school or a classroom (as an observer or student): 69%
- Leisure activities: 68%
- Conversation in large groups: 66%
- Use in noisy situations: 58%

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* % of satisfied HA owners compared to EuroTrak 2012
** question slightly changed: 2012=Understanding a lecture in a large public place

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

HA-owner, n=711
## Overall satisfaction with hearing aids

<table>
<thead>
<tr>
<th></th>
<th>Offentlig høreklínik</th>
<th>Privat høreapparatbutik (ikke ØNH pulje pt.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mild-moderate hearing loss</td>
<td>76% (ET12:70%) (n=200)</td>
<td>82% (ET12:76%) (n=248)</td>
</tr>
<tr>
<td>Severe-profound hearing loss</td>
<td>67% (ET12:60%) (n=89)</td>
<td>52% (ET12:76%) (n=66)</td>
</tr>
</tbody>
</table>
Channel

Where was your most current hearing aid purchased?

2016 n=711
- '41% Internet, postorder
- '45% Ørelægen
- '2% Privat høreklínik
- '11% Offentlig høreklínik/hospital

2012 n=652
- '42% Internet, postorder
- '47% Ørelægen
- '6% Privat høreklínik
- '2% Offentlig høreklínik/hospital

Don’t know
Other

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Satisfaction with current HA: privat høreapparatbutik vs. offentlig høreklinic

% satisfied

Offentlig høreklinic (N=289)  Privat høreapparatbutik (N=314)
Satisfaction with current HA: privat høreapparatbutik vs. offentlig hørelinik vs ørelægen

% satisfied

- **Dispenser**
- **Listening situation**
- **Sound quality signal process.**
- **Product features**

Offentlig hørelinik (N=289) — Privat høreapparatbutik (N=314) — Ørelægen (N=62)
Additional Information

Degree of HL vs. public/private
Satisfaction with current HA: privat høreapparatbutik vs. offentlig hørelinik

% satisfied

Dispenser
Listening situation
Sound quality signal process.
Product features

Mild-Moderate HL

mild-moderate: Offentlig hørelinik (N=200)
mild-moderate: Privat høreapparatbutik (N=248)
Satisfaction with current HA: privat høreapparatbutik vs. offentlig høreklínik

Severe-Profound HL

- Dispenser
- Listening situation
- Sound quality
- Signal process
- Product features

Severe-profound: Offentlig høreklínik (N=89)
Severe-profound: Privat høreapparatbutik (N=66)
Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA

Dispenser
- Quality of service after purchase
- Quality of dispensers counseling
- Professionalism of dispenser
- Quality of service during hearing aid fitting period

Sound quality signal process.
- Richness or fidelity of sound
- Clearness of tone and sound
- Natural sounding
- Comfort with loud sounds

Product features
- Value (performance versus money spent)
- Reliability
- Managing whistling/feedback/buzzing
- Overall fit/ Comfort
- Visibility to others
- Ease of changing battery
- Battery life

Influence on overall satisfaction with HA*

- Dispenser:
  - Quality of service after purchase: 0.60
  - Quality of dispensers counseling: 0.59
  - Professionalism of dispenser: 0.57
  - Quality of service during hearing aid fitting period: 0.57

- Sound quality signal process:
  - Richness or fidelity of sound: 0.80
  - Clearness of tone and sound: 0.79
  - Natural sounding: 0.77
  - Comfort with loud sounds: 0.73

- Product features:
  - Value (performance versus money spent): 0.72
  - Reliability: 0.71
  - Managing whistling/feedback/buzzing: 0.70
  - Overall fit/ Comfort: 0.62
  - Visibility to others: 0.55
  - Ease of changing battery: 0.54
  - Battery life: 0.46

*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 or fidelity of sound is the most important criterion for satisfaction.
# Important listening situations

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

<table>
<thead>
<tr>
<th>Situation</th>
<th>Hearing loss Total (n=1304)</th>
<th>Hearing aid (n=711)</th>
<th>Hearing loss but no hearing aid (n=593)</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home with family members</td>
<td>51%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In conversations with large groups</td>
<td>43%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In conversations with small groups</td>
<td>42%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When talking on a phone</td>
<td>41%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When watching TV with others</td>
<td>34%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In conversations with 1 person</td>
<td>31%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In a larger lecture hall (e.g., theater, concert hall, place of worship, etc.)</td>
<td>29%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In noisy situations</td>
<td>26%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In the workplace</td>
<td>26%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When talking to children</td>
<td>22%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When listening to music</td>
<td>16%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When riding in a car</td>
<td>13%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>During leisure activities (e.g., exercising, taking a walk, etc.)</td>
<td>9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outdoors</td>
<td>9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>At a movie theater</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>7%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially communication effectiveness, social life, participating in group activities and relationships at home 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).

<table>
<thead>
<tr>
<th>Area</th>
<th>a lot worse</th>
<th>worse</th>
<th>the same</th>
<th>better</th>
<th>a lot better</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall ability to communicate more effectively in most...</td>
<td>9%</td>
<td>31%</td>
<td>39%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Ability to participate in group activities</td>
<td>11%</td>
<td>36%</td>
<td>37%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Social life</td>
<td>8%</td>
<td>42%</td>
<td>34%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Relationships at home</td>
<td>7%</td>
<td>45%</td>
<td>32%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Sense of safety</td>
<td>7%</td>
<td>48%</td>
<td>29%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Physical health</td>
<td>6%</td>
<td>50%</td>
<td>28%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Mental/emotional health</td>
<td>7%</td>
<td>51%</td>
<td>27%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Relationships at work</td>
<td>11%</td>
<td>47%</td>
<td>29%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Confidence in yourself</td>
<td>7%</td>
<td>54%</td>
<td>24%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Feelings about yourself</td>
<td>7%</td>
<td>53%</td>
<td>23%</td>
<td>16%</td>
<td></td>
</tr>
<tr>
<td>Sense of independence</td>
<td>6%</td>
<td>58%</td>
<td>22%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Mental ability</td>
<td>6%</td>
<td>60%</td>
<td>21%</td>
<td>12%</td>
<td></td>
</tr>
</tbody>
</table>

HA-owner, n=711
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss

% of HA owners feeling better/a lot better

0% 10% 20% 30% 40% 50% 60% 70% 80%

Overall ability to communicate more, Ability to participate in group activities, Social life, Relationships at home, Sense of safety, Physical health, Mental/Emotional health, Relationships at work, Feelings about yourself, Confidence in yourself, Sense of independence, Mental ability

Low 50% hearing loss (n=214)  Top 50% hearing loss (n=411)
Even 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?

<table>
<thead>
<tr>
<th>Aspect</th>
<th>a lot worse</th>
<th>worse</th>
<th>the same</th>
<th>better</th>
<th>a lot better</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication with Person</td>
<td>8%</td>
<td>36%</td>
<td>33%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Social activities together with Person</td>
<td>6%</td>
<td>57%</td>
<td>24%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Personal relationship with Person</td>
<td>4%</td>
<td>72%</td>
<td>16%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Quarrels/disputes with Person</td>
<td>4%</td>
<td>75%</td>
<td>13%</td>
<td>7%</td>
<td></td>
</tr>
</tbody>
</table>

Someone in HH / parent has HA, n=607
94% 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?

- Never: 6%
- Rarely: 39%
- Occasionally: 20%
- Regularly: 36%

Base: N=711
4. Analysis of hearing impaired non-owners
Reasons for not having hearing aids
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

<table>
<thead>
<tr>
<th></th>
<th>% HA Owner (n=711)</th>
<th>%HA-Non-owner Low 50% HL (n=274)</th>
<th>%HA-Non-owner Top 50% HL (n=143)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>17%</td>
<td>44%</td>
<td>41%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>83%</td>
<td>56%</td>
<td>59%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>24%</td>
<td>81%</td>
<td>38%</td>
</tr>
<tr>
<td>Moderate</td>
<td>48%</td>
<td>14%</td>
<td>45%</td>
</tr>
<tr>
<td>Severe</td>
<td>21%</td>
<td>2%</td>
<td>11%</td>
</tr>
<tr>
<td>Profound</td>
<td>8%</td>
<td>2%</td>
<td>7%</td>
</tr>
</tbody>
</table>

More similar hearing loss structure
### Top 10 reasons for not having a hearing aid (I/II)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Somewhat a reason</th>
<th>Not a reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hear well enough in most situations</td>
<td>32%</td>
<td>30%</td>
</tr>
<tr>
<td>Hearing loss not severe enough</td>
<td>29%</td>
<td>35%</td>
</tr>
<tr>
<td>Uncomfortable</td>
<td>24%</td>
<td>50%</td>
</tr>
<tr>
<td>They do not work well in noisy situations</td>
<td>28%</td>
<td>52%</td>
</tr>
<tr>
<td>Have hearing loss in only one ear</td>
<td>24%</td>
<td>58%</td>
</tr>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>18%</td>
<td>59%</td>
</tr>
<tr>
<td>They do not restore your hearing to normal</td>
<td>15%</td>
<td>59%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>18%</td>
<td>63%</td>
</tr>
<tr>
<td>Have not had hearing tested yet</td>
<td>11%</td>
<td>66%</td>
</tr>
<tr>
<td>Ear doctors opinion (ENT)</td>
<td>14%</td>
<td>67%</td>
</tr>
</tbody>
</table>

Base: non owners Top 50% HL: n=132
Less important reasons for not having a hearing aid (II/II)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Reason</th>
<th>Somewhat a reason</th>
<th>Not a reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>6%</td>
<td>25%</td>
<td>69%</td>
</tr>
<tr>
<td>Cannot afford a hearing aid</td>
<td>18%</td>
<td>13%</td>
<td>69%</td>
</tr>
<tr>
<td>Have more serious priorities</td>
<td>16%</td>
<td>14%</td>
<td>70%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>15%</td>
<td>13%</td>
<td>72%</td>
</tr>
<tr>
<td>Family doctors opinion (GP)</td>
<td>16%</td>
<td>12%</td>
<td>72%</td>
</tr>
<tr>
<td>Have Sensory-neural hearing loss (nerve deafness)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>9%</td>
<td>16%</td>
<td>75%</td>
</tr>
<tr>
<td>Cannot afford a hearing aid</td>
<td>14%</td>
<td>11%</td>
<td>75%</td>
</tr>
<tr>
<td>Have more serious priorities</td>
<td>13%</td>
<td>11%</td>
<td>76%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>12%</td>
<td>11%</td>
<td>77%</td>
</tr>
<tr>
<td>Family doctors opinion (GP)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bad design</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do not admit I have a hearing loss in public</td>
<td>5%</td>
<td>15%</td>
<td>80%</td>
</tr>
<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>9%</td>
<td>10%</td>
<td>81%</td>
</tr>
<tr>
<td>Would be embarrassed to wear a hearing aid</td>
<td>8%</td>
<td>10%</td>
<td>83%</td>
</tr>
<tr>
<td>I have vision or dexterity problems</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>7%</td>
<td>9%</td>
<td>84%</td>
</tr>
<tr>
<td>Do not know where to get hearing aids</td>
<td>6%</td>
<td>9%</td>
<td>84%</td>
</tr>
<tr>
<td>Hearing problem requires surgery</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing Aid Dispenser/Audiologists opinion</td>
<td>5%</td>
<td>9%</td>
<td>86%</td>
</tr>
<tr>
<td>Do not trust Hearing Aid Dispenser/Audiologist</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social / Family opinion such as child, spouse, friend</td>
<td>4%</td>
<td>7%</td>
<td>87%</td>
</tr>
<tr>
<td>Had surgery - hearing aids wont help</td>
<td></td>
<td></td>
<td>89%</td>
</tr>
</tbody>
</table>
Top 10 reasons for HA owners NOT using them

<table>
<thead>
<tr>
<th>Reason</th>
<th>Reason</th>
<th>Somewhat a reason</th>
<th>Not a reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hear well enough in most situations</td>
<td>42%</td>
<td>17%</td>
<td>41%</td>
</tr>
<tr>
<td>They do not restore your hearing to normal</td>
<td>30%</td>
<td>29%</td>
<td>41%</td>
</tr>
<tr>
<td>They do not work well in noisy situations</td>
<td>26%</td>
<td>21%</td>
<td>53%</td>
</tr>
<tr>
<td>Uncomfortable</td>
<td>32%</td>
<td>14%</td>
<td>55%</td>
</tr>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>32%</td>
<td>13%</td>
<td>55%</td>
</tr>
<tr>
<td>Have tried hearing aid and they do not work</td>
<td>24%</td>
<td>17%</td>
<td>59%</td>
</tr>
<tr>
<td>Have more serious priorities</td>
<td>21%</td>
<td>19%</td>
<td>60%</td>
</tr>
<tr>
<td>Have hearing loss in only one ear</td>
<td>19%</td>
<td>18%</td>
<td>63%</td>
</tr>
<tr>
<td>Hearing loss not severe enough</td>
<td>15%</td>
<td>22%</td>
<td>63%</td>
</tr>
<tr>
<td>Have hearing loss only with high pitch sounds</td>
<td>18%</td>
<td>12%</td>
<td>69%</td>
</tr>
</tbody>
</table>

Owners who don’t use, n=62
Social rejection because of hearing loss compared to the acceptance of hearing aids
89% of hearing aid owners think people don’t 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?**

- Never: 70%
- Rarely: 19%
- Occasionally: 5%
- Regularly: 5%

**Base: N=711**

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

- Never: 36%
- Rarely: 46%
- Occasionally: 16%
- Regularly: 2%

**Base: Top 50% hearing loss, no hearing aid N=143**
Buying intentions and most important triggers to buy
15% (2012:14%) of non-owners intend to get a hearing aid within the next year. Re-buying intention is higher than first-buying intention.

**Buying intention hearing impaired in %**

<table>
<thead>
<tr>
<th>Owner</th>
<th>Within the next 6 months</th>
<th>In about a year</th>
<th>In about 2 years</th>
<th>In about 3 years</th>
<th>Not within 7 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-owner</td>
<td>11%</td>
<td>12%</td>
<td>15%</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td>20%</td>
<td>8%</td>
<td>28%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*HA-non-owner, n=593*  
*HA-owner, n=711*
The most important influencing factors are worsening hearing loss, the ENT and the spouse

**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?

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

<table>
<thead>
<tr>
<th>Factor</th>
<th>Owner (n=711)</th>
<th>Non-Owner (n=593)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing loss got worse</td>
<td>70%</td>
<td>48%</td>
</tr>
<tr>
<td>ENT/ Ear Doctor</td>
<td>29%</td>
<td>36%</td>
</tr>
<tr>
<td>Spouse</td>
<td>15%</td>
<td>34%</td>
</tr>
<tr>
<td>GP /Family doctor</td>
<td>21%</td>
<td>38%</td>
</tr>
<tr>
<td>Hospital audiology</td>
<td>7%</td>
<td>33%</td>
</tr>
<tr>
<td>Free due to coverage by Insurance / Received hearing aid...</td>
<td>4%</td>
<td>27%</td>
</tr>
<tr>
<td>Friend / relative</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Price of hearing aid</td>
<td>4%</td>
<td>23%</td>
</tr>
<tr>
<td>Child</td>
<td>14%</td>
<td>22%</td>
</tr>
<tr>
<td>Another hearing aid owner (word of mouth)</td>
<td>5%</td>
<td>14%</td>
</tr>
<tr>
<td>Safety concerns</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Co-worker or boss</td>
<td>2%</td>
<td>15%</td>
</tr>
<tr>
<td>Financial Situation improved</td>
<td>2%</td>
<td>15%</td>
</tr>
<tr>
<td>Information/advice about hearing loss from consumer..</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Private dispenser</td>
<td>1%</td>
<td>7%</td>
</tr>
<tr>
<td>Hearing loss article or literature</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>TV advertisement</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Magazine advertisement</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Direct mail piece</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Internet: Websites of hearing aid clinics</td>
<td>3%</td>
<td>11%</td>
</tr>
<tr>
<td>Radio advertisement</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Newspaper advertisement</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Celebrity or public personality</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Internet: Other websites, google...</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Internet: Websites of hearing aids manufacturers</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Telemarketing phone call</td>
<td>1%</td>
<td>0%</td>
</tr>
</tbody>
</table>

*=Top 5 influences for owners in EuroTrak 2012

*=Top 5 influences for non owners in EuroTrak 2012
The most important trigger to buy a hearing aid is worsening hearing loss, the dispenser and the ENT.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing loss got worse</td>
<td>24%</td>
</tr>
<tr>
<td>Free due to coverage by Insurance / Received hearing aid free of charge</td>
<td>18%</td>
</tr>
<tr>
<td>Spouse</td>
<td>11%</td>
</tr>
<tr>
<td>Audiologist</td>
<td>10%</td>
</tr>
<tr>
<td>ENT/ Ear Doctor</td>
<td>9%</td>
</tr>
<tr>
<td>Hearing aid dispenser / Audiologist</td>
<td>6%</td>
</tr>
<tr>
<td>GP /Family doctor</td>
<td>4%</td>
</tr>
<tr>
<td>Friend / relative</td>
<td>2%</td>
</tr>
<tr>
<td>TV advertisement</td>
<td>2%</td>
</tr>
<tr>
<td>Another hearing aid owner (word of mouth)</td>
<td>2%</td>
</tr>
<tr>
<td>Child</td>
<td>2%</td>
</tr>
</tbody>
</table>
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EHIMA secretary general
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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 of an interval +-3.1 around 15% - which means between 11.9% and 18.1% (Conservative assumption: 95% confidence level)

<table>
<thead>
<tr>
<th>Sample size</th>
<th>Random sample error</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Real value is within interval:</td>
</tr>
<tr>
<td></td>
<td>Level of proportion: 50%/50%</td>
</tr>
<tr>
<td>50</td>
<td>+- 13.9</td>
</tr>
<tr>
<td>100</td>
<td>+- 9.8</td>
</tr>
<tr>
<td>250</td>
<td>+- 6.2</td>
</tr>
<tr>
<td>500</td>
<td>+- 4.4</td>
</tr>
<tr>
<td>1000</td>
<td>+- 3.1</td>
</tr>
<tr>
<td>5'000</td>
<td>+- 1.4</td>
</tr>
<tr>
<td>10’000</td>
<td>+- 1.0</td>
</tr>
</tbody>
</table>
Demographics (1) Hearing instrument adoption rates and populations

<table>
<thead>
<tr>
<th>Profiles: Categories add to 100%*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
</tr>
<tr>
<td>Male</td>
</tr>
<tr>
<td>Male</td>
</tr>
<tr>
<td>Female</td>
</tr>
<tr>
<td>Age recoded</td>
</tr>
<tr>
<td>1 - 14</td>
</tr>
<tr>
<td>15 - 24</td>
</tr>
<tr>
<td>25 - 34</td>
</tr>
<tr>
<td>35 - 44</td>
</tr>
<tr>
<td>45 - 54</td>
</tr>
<tr>
<td>55 - 64</td>
</tr>
<tr>
<td>65 - 74</td>
</tr>
<tr>
<td>74+</td>
</tr>
<tr>
<td>Type of household</td>
</tr>
<tr>
<td>single household</td>
</tr>
<tr>
<td>Couple, no kids</td>
</tr>
<tr>
<td>Couple with kid(s)</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

* Small sample sizes in some categories
Demographics (2) Hearing instrument adoption rates and populations

<table>
<thead>
<tr>
<th>Profiles: Categories add to 100%*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
</tr>
<tr>
<td>The head of the household (alone or together with someone)</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
</tr>
<tr>
<td>Other Person</td>
</tr>
<tr>
<td><strong>Employment</strong></td>
</tr>
<tr>
<td>Full time employed</td>
</tr>
<tr>
<td>Part time employed</td>
</tr>
<tr>
<td>Unemployed / not working</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
</tr>
<tr>
<td><strong>Education</strong></td>
</tr>
<tr>
<td>Folkeskole</td>
</tr>
<tr>
<td>Ungdomsuddannelse</td>
</tr>
<tr>
<td>Erhvervsuddannelse/mesterlære</td>
</tr>
<tr>
<td>Videregående uddannelse, kort - op til 3 år</td>
</tr>
<tr>
<td>Videregående uddannelse, mellemlang - 3-5 år</td>
</tr>
<tr>
<td>Videregående uddannelse, lang - mere end 5 år</td>
</tr>
<tr>
<td>Andet</td>
</tr>
</tbody>
</table>

* Small sample sizes in some categories