



Results

EuroTrak Norway 2019

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





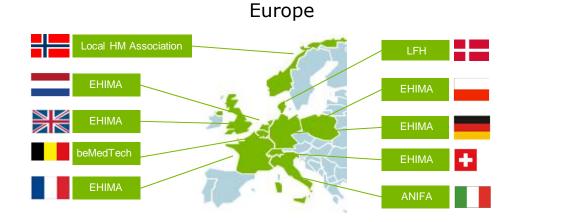




Summary 1. Introduction

- EuroTrak Norway 2019 was designed and executed by Anovum (Zurich) on behalf of the European Hearing Instrument Manufacturers Association (EHIMA).
- Sample sizes Norway 2019:
 - Representative sample (sample 1):
 - Hearing impaired (sample 2):
- n=12'229 people n=1'046 people
- Hearing impaired non-owners:
- HA owners:

- n = 498 people with hearing loss (**HL**)
- n= 548 people with hearing aid (HA)
- EuroTrak UK 2019 is part of the EuroTrak studies:





APAC







Summary 2. Market overview

- Stated hearing loss prevalence
 - Total: 9.3%, 18+: 10.9% (2012: 8.8%, 18+: 10.8%).
 - Binaural hearing loss: HA owners: 80%, HA non-owners: 64%.
 - Hearing Tests: 37% (2012: 42%) had a hearing test in the last 5 years, most tests done by ENTs.
- Hearing aid adoption rate (HA penetration)
 - Total: 49.1% (2012: 42.5%).
 - Total age group 18+: 49.8% (2012: 43.3%).
 - 79% of HA owners have binaural treatment (2012: 74%).
- The route to the hearing aid
 - 81% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
 - 67% got hearing aids recommended from the ENT or family doctor (drop out rate=17% / 2012: 22%).
 - 63% (2012: 55%) of the GP consultations referred to an ENT. 11% recommended no action.
 - 47% of ENT consultations referred to an audiologist, 50% (2012: 39%) recommended to get a hearing aid.
- 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
 - 94% (2012: 94%) of all HA owners asked some kind of 3rd party reimbursement.
 - 70% of the currently owned HAs were bought 2015 or later.
 - The average age of the currently owned HAs is 3.3 years (2012: 2.7 years).
 - The median age of hearing aids before replacement is 6 years.
 - On average, HAs are worn 7.6 hours a day (2012: 7.9).
 - 47% of today's hearing aid owners are aware of their hearing aid brand.
 - 50% have been informed about hearing aid accessories by the HCP, 33% use an HA accessory.
- Importance of listening situations and satisfaction with HAs
 - 79% of the hearing aid owners say their hearing aid works better than or as expected
 - 74% (2012:72%) 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, conversations with 1 person and talking on a phone are the most frequent important listening situations.
- Positive impact of HAs
 - Significant positive impact of HAs on different aspects especially communication, participation in group activities and social life.
 - 93% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes







Summary 4. Analysis of hearing impaired non-owners

- Reasons not to own/use HAs
 - Only 34% (2012: 27%) of the hearing impaired without hearing aids think that a third party would pay any
 part of hearing aids.
 - The main reasons for not using hearing aids are that people say that they are uncomfortable, hearing loss is not severe enough and they do not work well in noisy situations.
 - 7% who own HAs don't use them at all (0 hour); 22% use them less than one hour/day (0-1 hour).
- Social rejection, buying intentions and triggers to buy
 - 74% of hearing aid owners feel that 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 (only 32% say they are never made fun of because of their hearing loss).
 - The most important trigger to buy a hearing aid is the audiologist, followed by the ENT and worsening hearing loss. Price of hearing aids is much more relevant for the non owners.









Detailed Results: Roadmap

New topics for EuroTrak 2019 are highlighted in red

1. Introduction

- Organisation of EuroTrak 2019
- Recruitment process: In search of hearing impaired people

2. Market overview

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

3. Analysis of hearing aid owners

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

4. Analysis of hearing impaired non-owners

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

5. Appendix

– Demographics: Hearing instrument adoption rates and populations











1. Introduction









Organisation of EuroTrak 2019

Organisation

- Principal of the project EuroTrak are GN ReSound Norge, Sivantos Norge, Cochlear Norge, Oticon Norge, Medus Norge, Starkey Norge, Phonak Norge and Widex Norge.
- 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

- The principal as well as the EHIMA companies may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.
- The raw dataset remains at Anovum. If the principal or the EHIMA companies 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 – Norway/2019/n=[relevant sample size]"

- The principal and EHIMA companies can ask Anovum to further analyse the raw data in specific ways at their own expense.
- EHIMA companies can order a report with satisfaction scores for their brand. The other brands will be shown as benchmarks without denomination (brand A, brand B etc.). The report will show all satisfaction values. It is not allowed to communicate any information from these reports outside the EHIMA company.









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 panelist pools of more than 80'000 people
- 3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
- 4. Result: Representative sample of **n=13'583** 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=548** hearing aid owners and **n=498** hearing impaired non-owners









2. Market overview









Prevalence of hearing loss and adoption rate

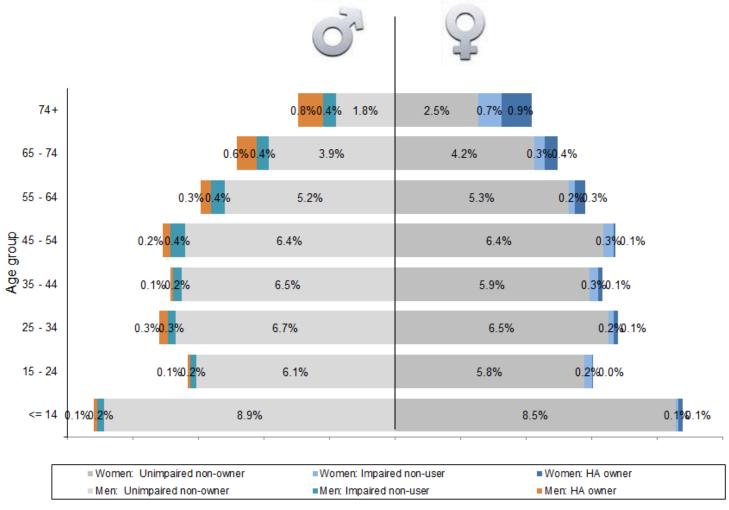








Hearing loss and hearing instrument ownership by gender/age



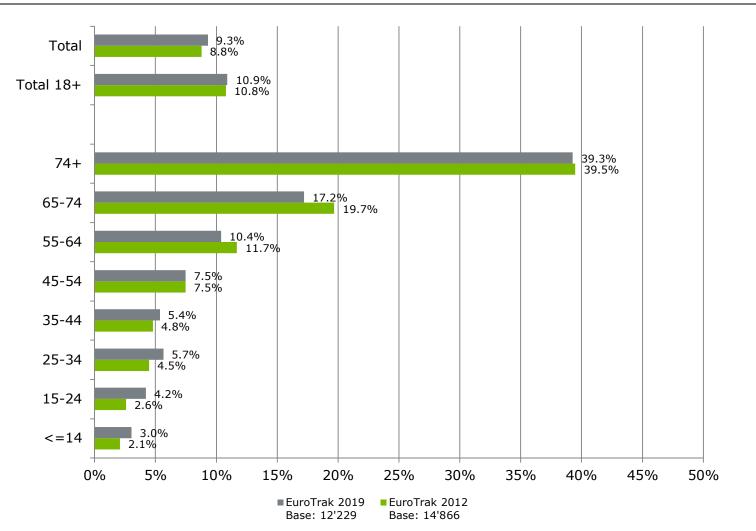








Hearing loss prevalence Norway



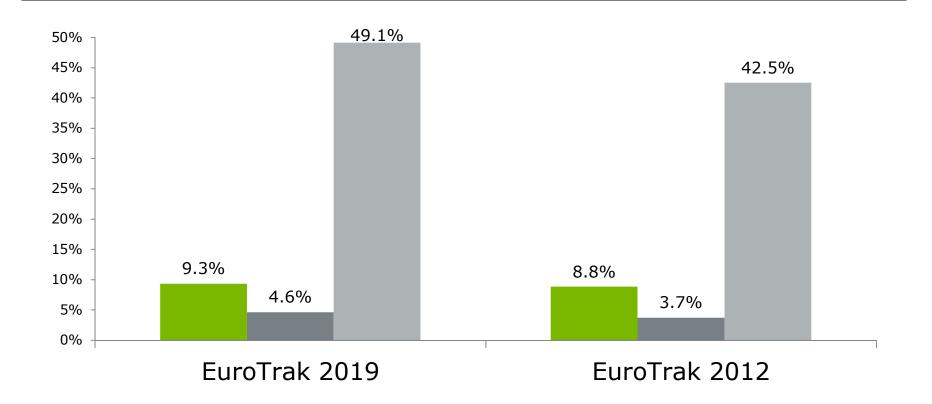








Overview hearing loss prevalence and hearing aid adoption



■ Hearing impaired (stated) ■ Adoption (% of population) ■ Adoption (% of stated impaired)



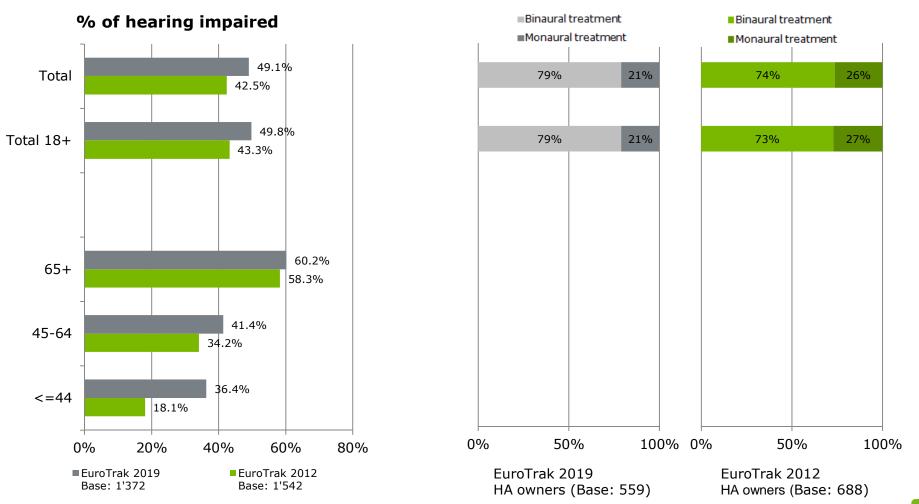






Hearing aid adoption rate Norway:

49% of hearing impaired have hearing aid(s), 79% of them have binaural treatment



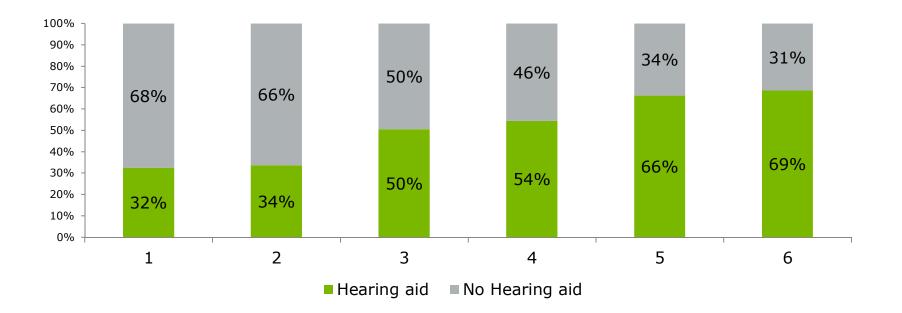








The more severe the hearing loss, the higher the adoption rate



Hearing loss 6-groups

HA-non-owner, n=498 HA-owner, n=548

* 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

 \rightarrow 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

	HA-Non-owner _{N=498}	HA Owner _{N=548}	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	36%	20%	38%
Bilateral loss	64%	80%	58%
Perceived loss			
Mild	37%	16%	29%
Moderate	49%	59%	54%
Severe	12%	21%	64%*
Profound	2%	4%	

ncs are unweighted whereas the shown results are weighted

* combined % evere+ and % profound+ because n is too small









Hearing tests and where hearing is tested

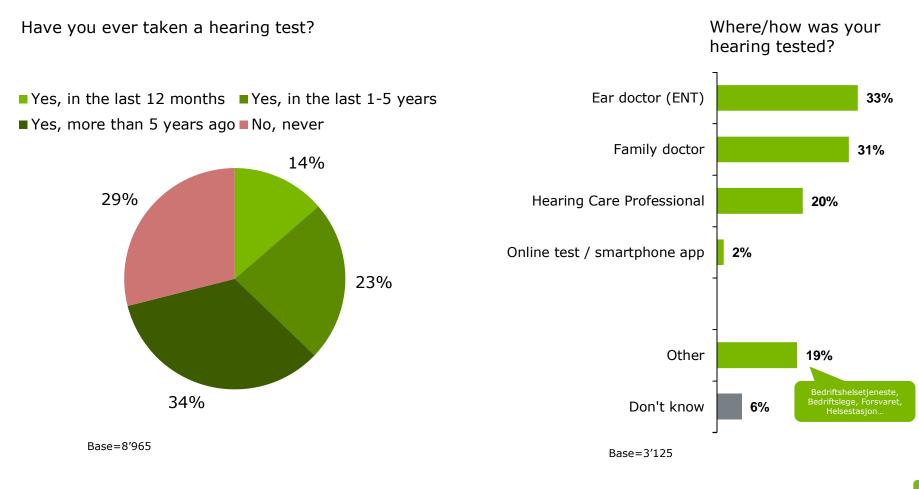








Hearing Tests: 37% (2012: 42%) had their hearing tested in the last 5 years – most tests are done by ENT's and family doctors.











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



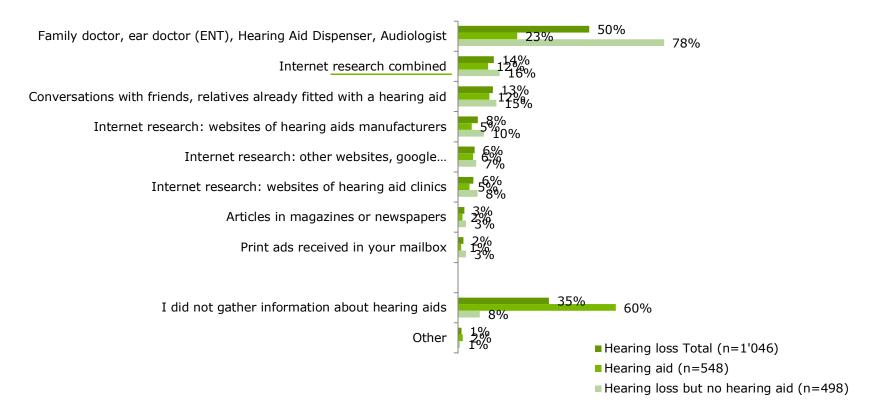






Doctors and HCPs are the most important sources of information and therefore the major gatekeepers – followed by internet research and other people with hearing aids.

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





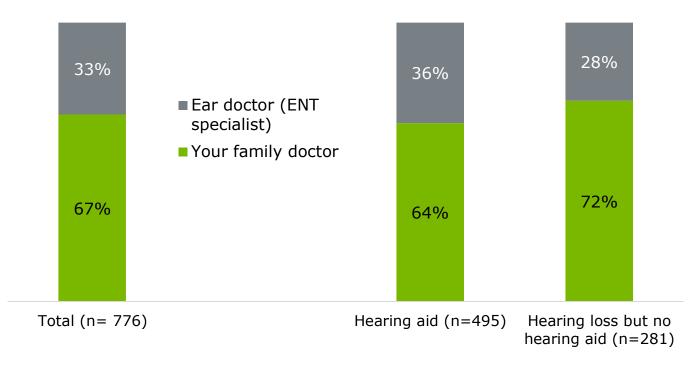






Of those who discussed the hearing loss with a doctor, 67% talked to the family doctor first.

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?

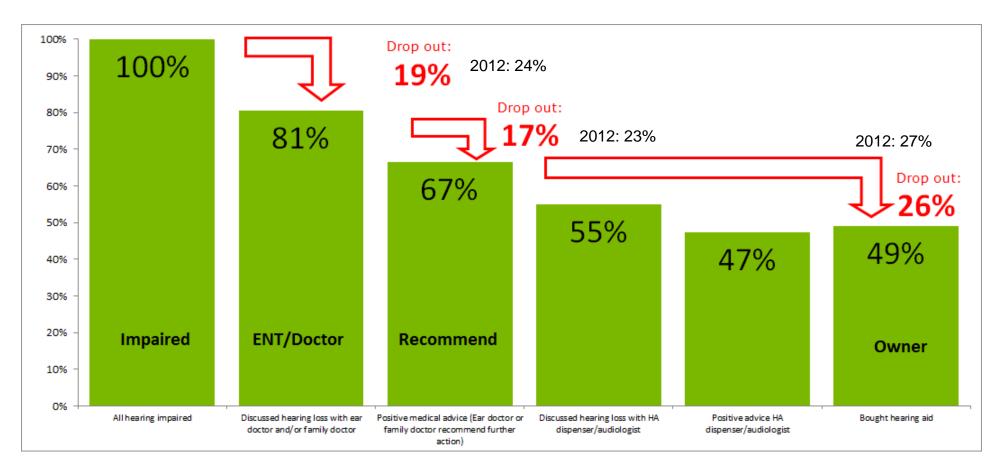








The route to the hearing aid: Compared to 2012 drop out 1 and 2 were reduced!



Base: n=1'046

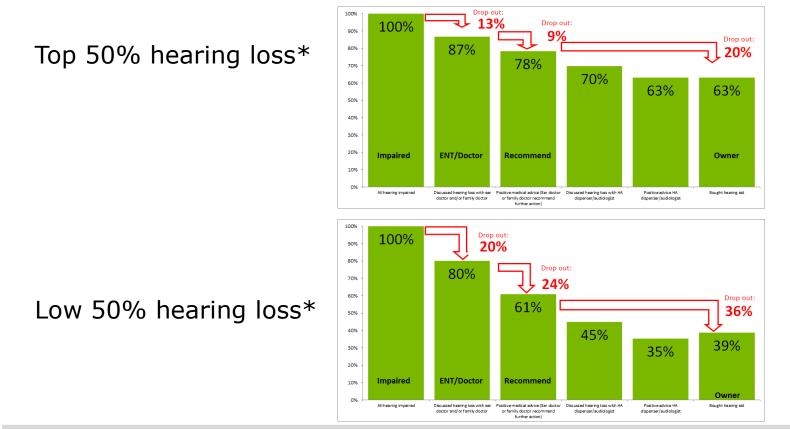








Much higher drop-out-rates for the lower hearing loss segments



Base: n=1'046

* 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

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

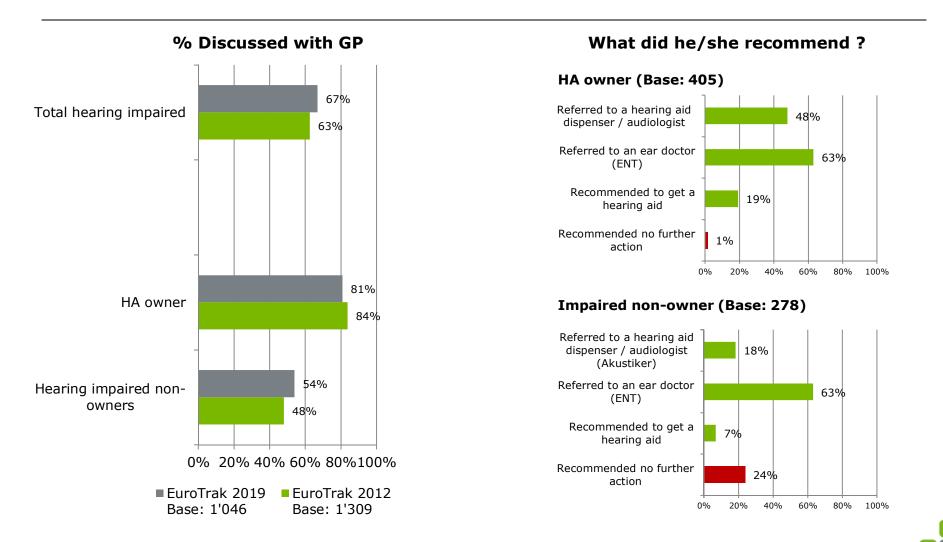






The route to the hearing aid: GP/Family doctor

Have you discussed your hearing problem with your family doctor?



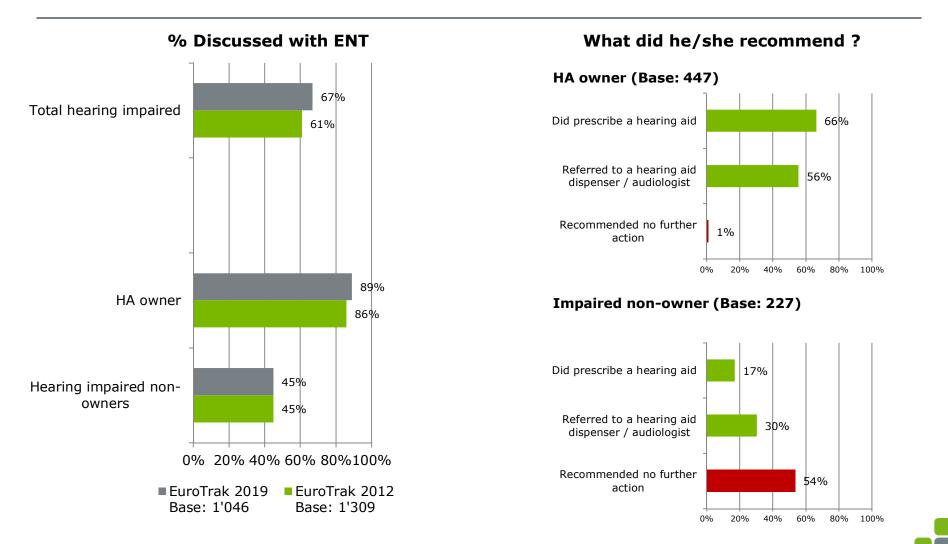






The route to the hearing aid: ENT

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





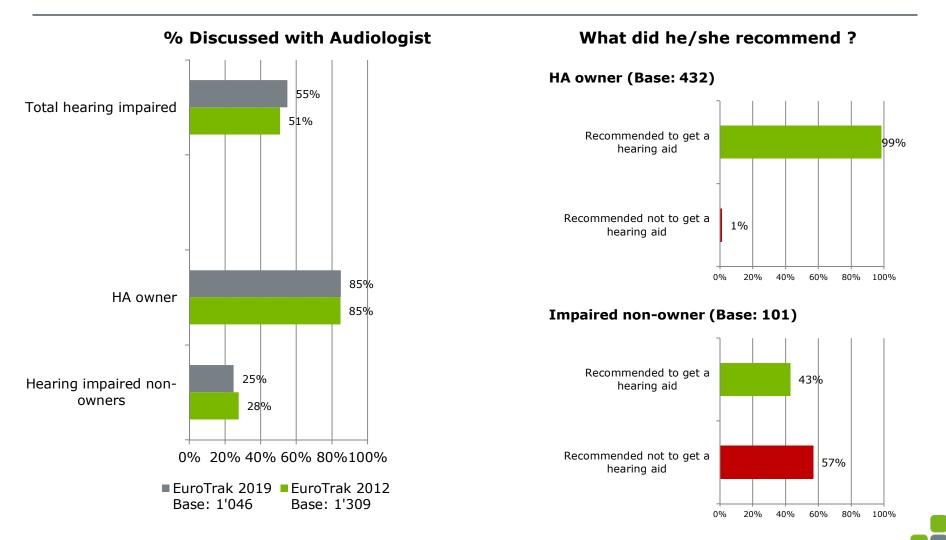






The route to the hearing aid: Audiologist

Have you discussed your hearing problem with an Audiologist?

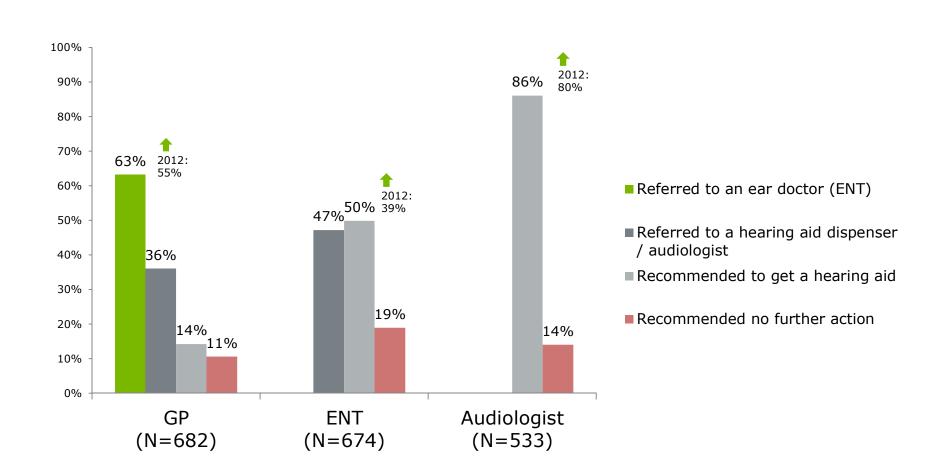








Recommendations by profession





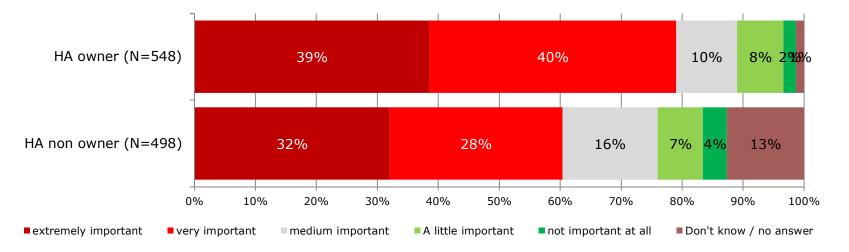




Importance of HA adaption / follow-up

To what extent is it important for you that hearing aids and adaptation / followup is an offer that is conveyed via the hearing center / ENT doctor and covered by the National Insurance Scheme?*

[I hvilken grad er det viktig for deg at høreapparat og tilpasning/oppfølging er et tilbud som formidles via høresentral/ØNH lege og som dekkes av folketrygden?]











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



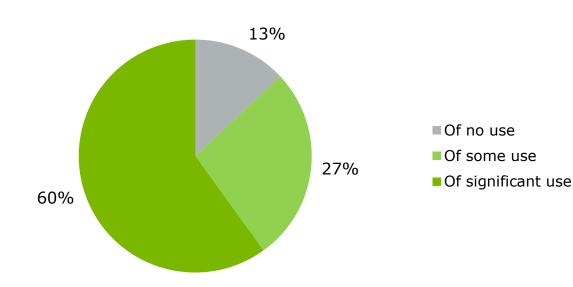






Work competitiveness: 87% of the working hearing aid owners state their hearing aid(s) are useful on their job.

How useful are your hearing aids on your job?







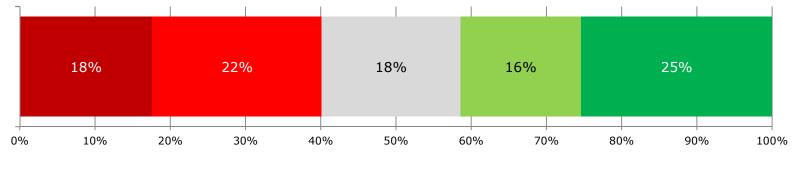




75% of HA owners depend at least a little on the HA when working or completing studies

To what extent do you depend on your hearing aids to be able to work or complete studies?*

[I hvilken grad er du avhengig av høreapparatene dine for å kunne stå i jobb/fullføre studier?]



extremely dependent = very dependent = medium dependent = a little dependent = not dependent at all



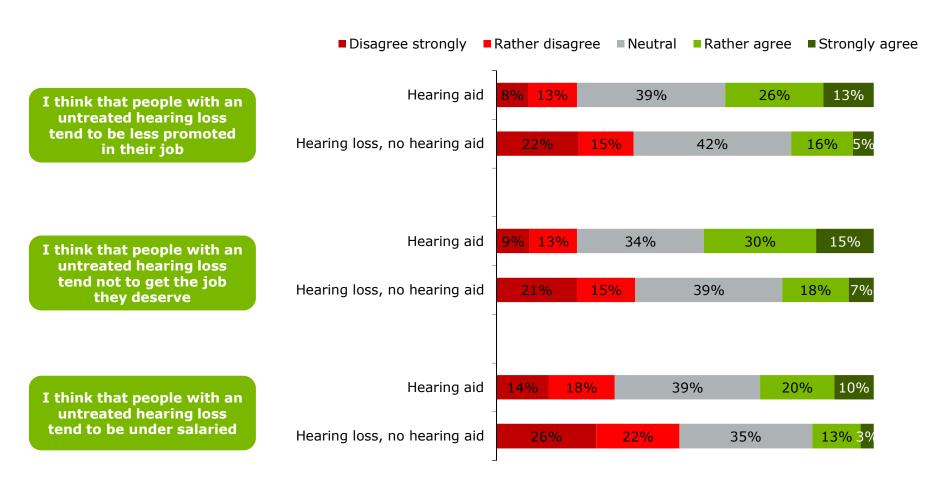
*Norway specific







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



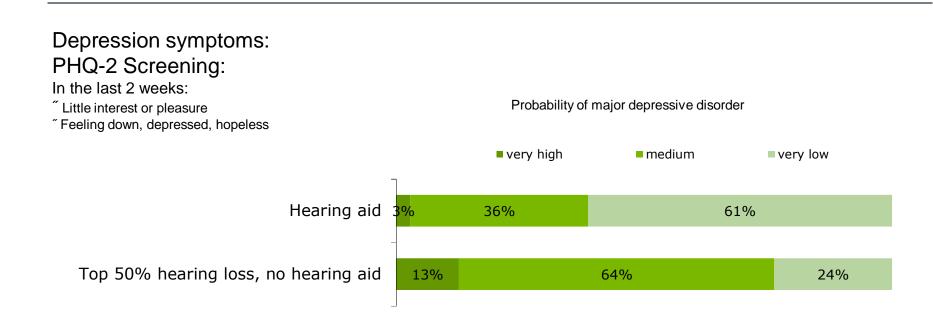
Base: hearing aid n=395 / Hearing loss, no hearing aid =342







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



Base: hearing aid n=398 / no hearing aid =90

*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:

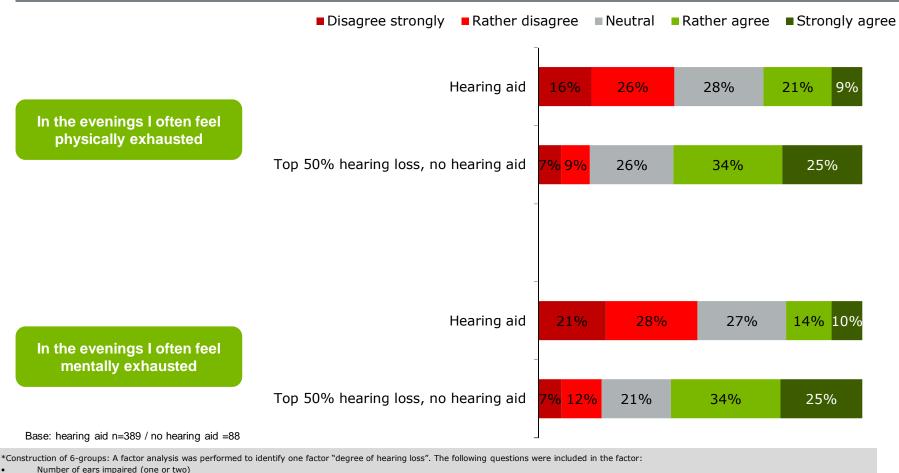
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- ightarrow People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).







General health problems: Compared to impaired hearing aid nonowners with significant hearing loss (Top 50% hearing loss*), hearing aid owners feel less exhausted in the evenings



- Number of ears impaired (one or tw
- Stated hearing loss (Mild to Profound)
 Secrets on 6 APHAP EC like questions (Scaled 1 E
- 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
- \rightarrow People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).

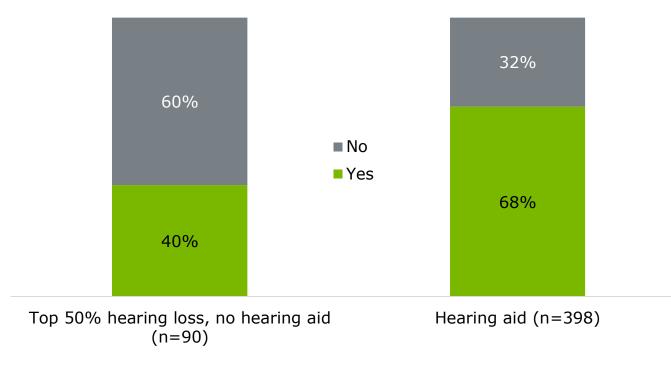






General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids

Are you generally satisfied with the quality of your sleep?





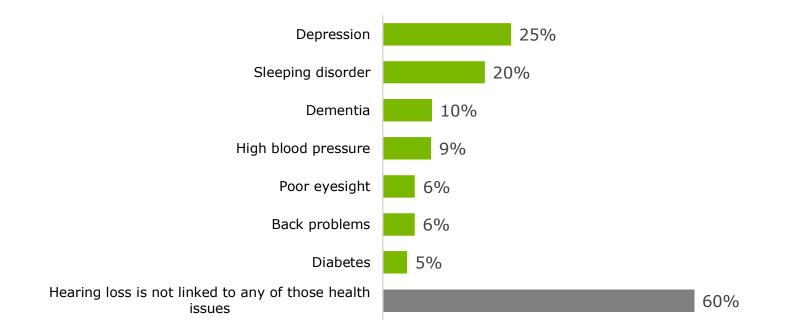






25% of all hearing impaired think that hearing loss could be linked to depression.

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



Hearing impaired, N=1'046









3. Analysis of hearing aid owners









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

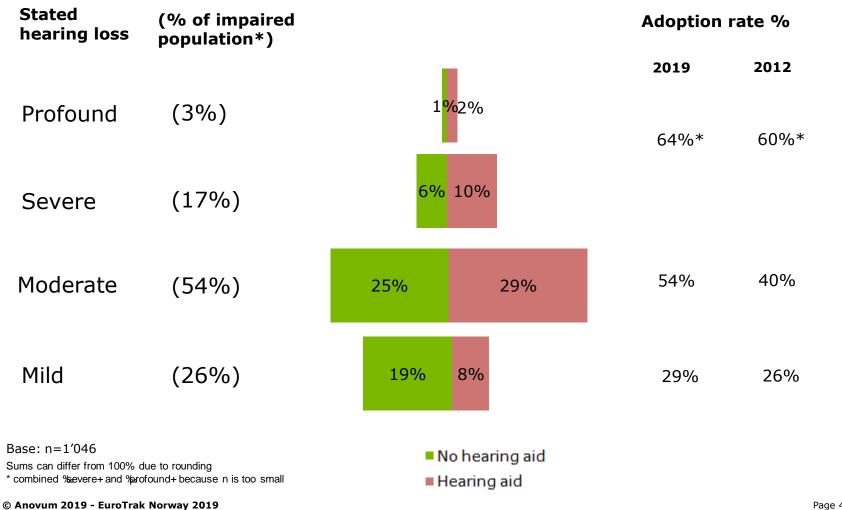








Low adoption rates within mild and moderate hearing loss





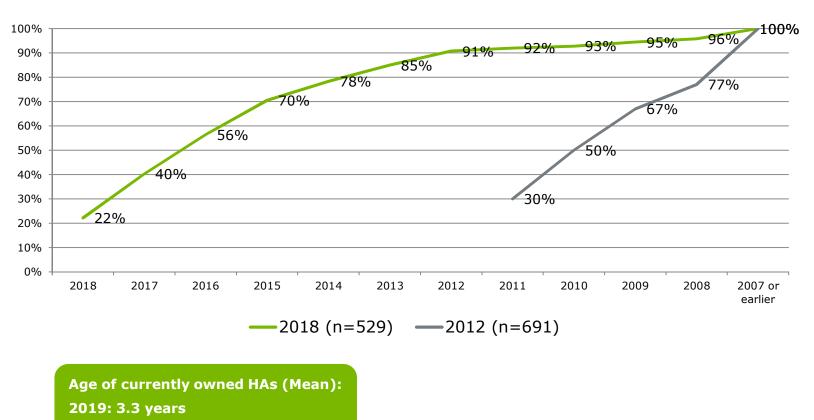






70% of the currently owned HAs were fitted in 2015 or later

Year of purchase





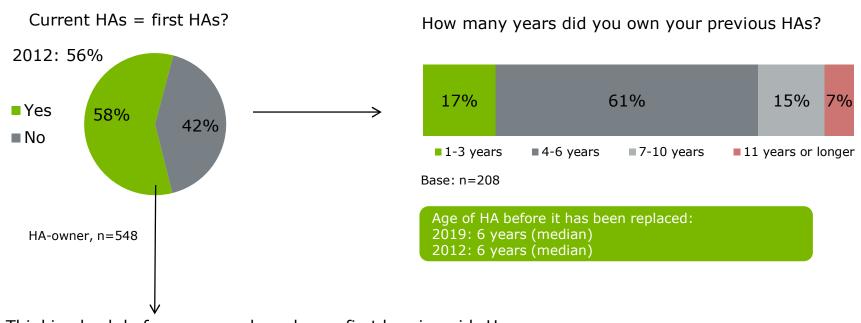
2012: 2.7 years







On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 6 years before they are being replaced.



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?

21%	19%	23%	17%	19%
■1 year ■2 y	years ∎3 yea	ars ∎4-6 years	more th	an 6 years
Base: n=290				



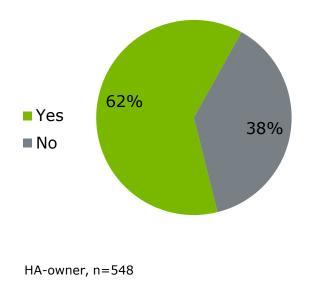






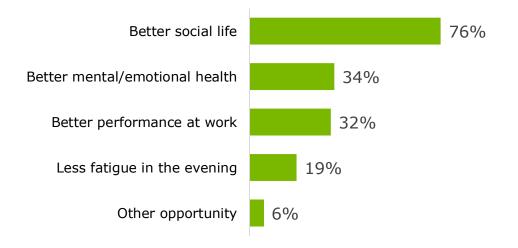
62% of all HA owners think they should have gotten their HAs sooner! Main reason is missing out on social life.

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



IF YES:

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





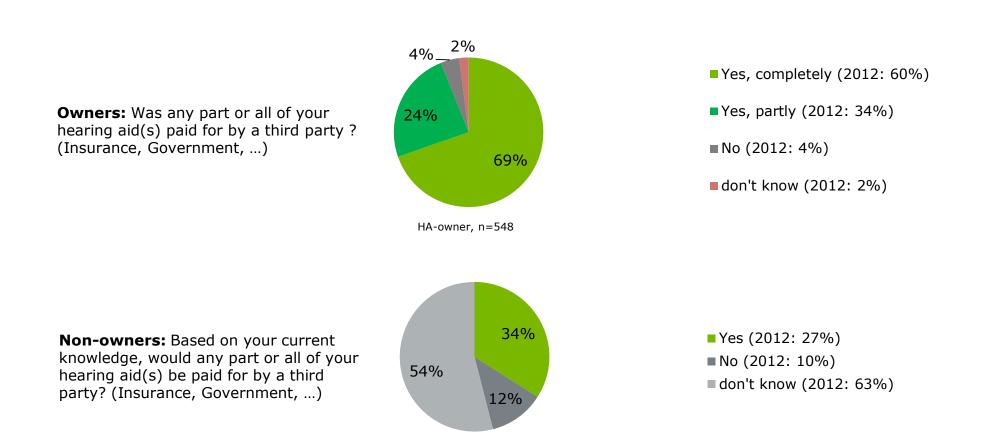








94% received some kind of 3rd party reimbursement. Information deficit non-owners: only 34% know whether government/ insurance would pay



HA-non-owners, n=498

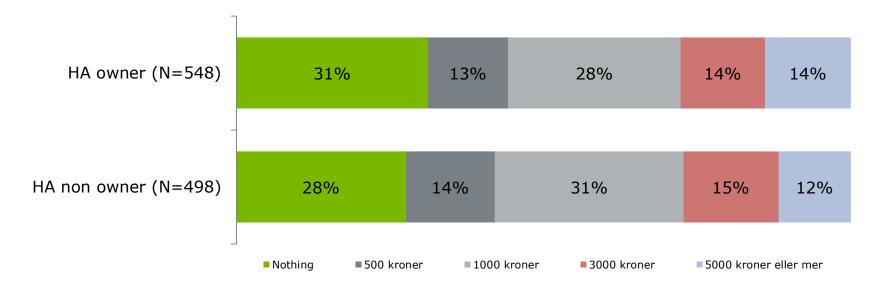






Willingness to pay additionally is relatively low – only 28% of the owners (27% of the non-owners) would contribute 3'000 or more kroner towards a HA

Today, the Norwegian Government pays for hearing aids up to a certain limit, p.t. 5'975 NKR. How much are you willing to pay additionally yourself for ONE hearing aid?







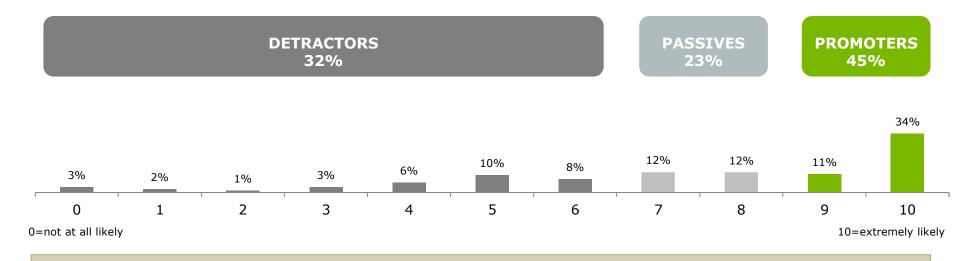






Recommendation intention of the place where the hearing aid(s) have been obtained is good, with a positive NPS score of 13.

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



NPS = PROMOTERS – DETRACTORS = 13



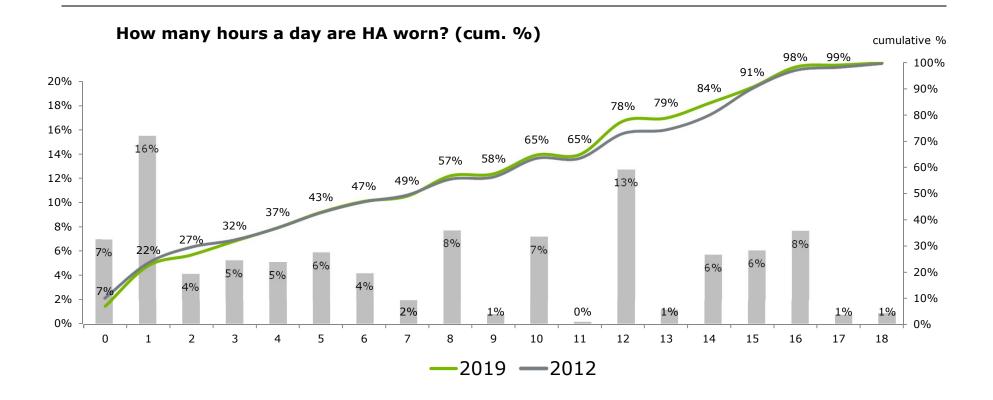
HA-owner, n=548







On average, HAs are worn 7.6 hours a day



HA worn: 2019 Mean: 7.6 hours/day 2012 Mean: 7.9 hours/day

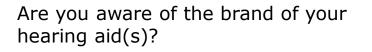
HA-owner: 2019: n=548 2012: n=691

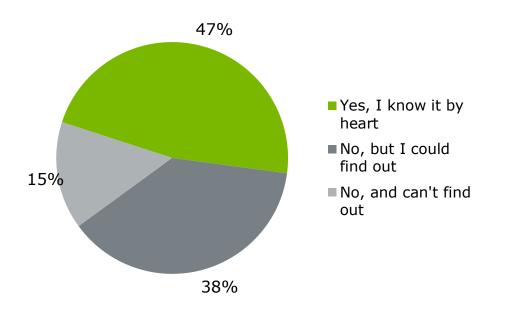






Only 47% of today's hearing aid owners are aware of their hearing aid brand.





Base: N=548









33% of the HA owners use an accessory for their hearing aids. 76% of those who use an accessory, are satisfied with it.

Have you been informed by your hearing care professional about hearing aid accessories, such as TV-Streamer/ Apps / Remote Control / etc. ? (HA owners, n=548)



Do you personally use accessories for your hearing aids (TV-Streamer/ Apps / Remote Control / etc.) ? (HA owners, n = 548)

33%		67%
	Yes	No

IF ACCESSORIES USED (n=196):

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

2%1 <mark>% 11%</mark>	11%	14%		39%			23%
very dissatisfied	dissatisfied	somewhat dissatisfied	neutral	somewhat satisfied	satisfied	very satisfie	ed









Satisfaction with hearing aids and drivers



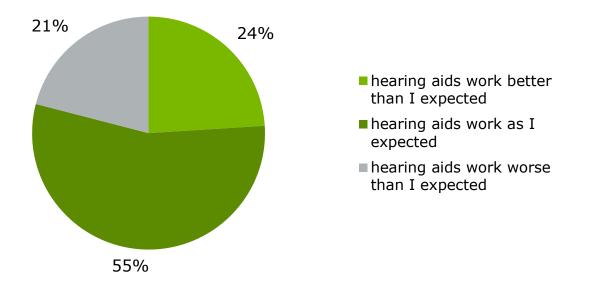






79% of the hearing aid owners say their hearing aid works better than or as expected

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

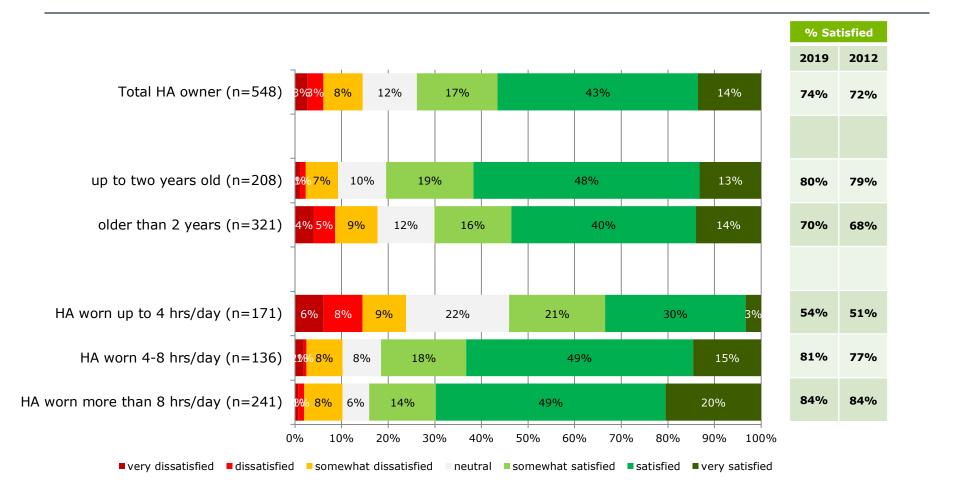








Overall satisfaction with HA stays on a good level with 74% of the users being satisfied

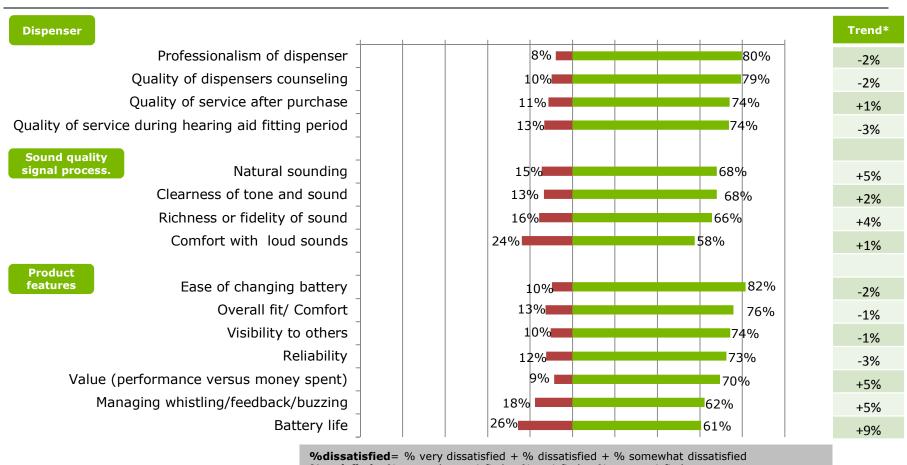








Satisfaction with current hearing aids

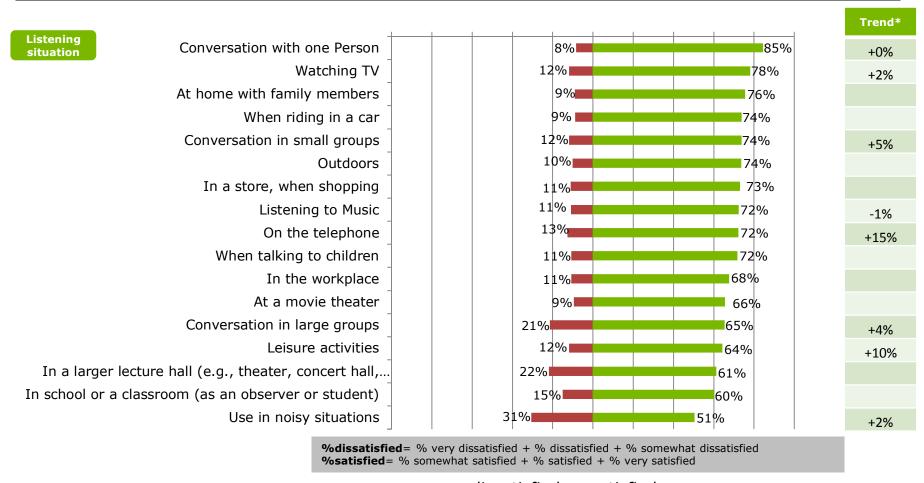


%satisfied= % somewhat satisfied + % satisfied + % very satisfied

*% of satisfied HA owners compared to EuroTrak 2012

dissatisfied satisfied





*% of satisfied HA owners compared to EuroTrak 2012







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

		Influence on overall satis- faction with HA*	
	Quality of service after purchase		0.64
Dispenser	Quality of service during hearing aid fitting period		0.63
	Quality of dispensers counseling		0.58
	Professionalism of dispenser		0.57
	Richness or fidelity of sound		0.70
Sound quality	Natural sounding		0.70
signal process.	Clearness of tone and sound		0.69
	Comfort with loud sounds		0.61
	Reliability		0.70
Product	Value (performance versus money spent)		0.60
features	Overall fit/ Comfort		0.57
	Visibility to others		0.54
	Ease of changing battery		0.52
	Managing whistling/feedback/buzzing		0.47
	Battery life		0.41

*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 / natural sounding / reliability are the most important criteria for satisfaction.



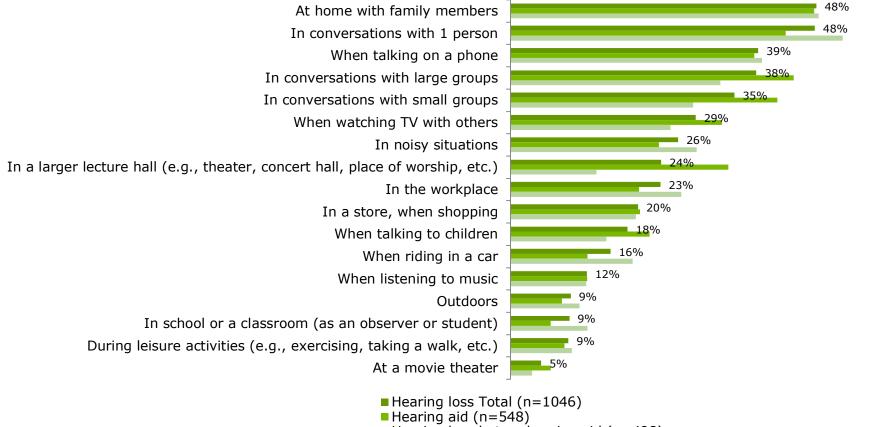






Important listening situations

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



Hearing loss but no hearing aid (n=498)





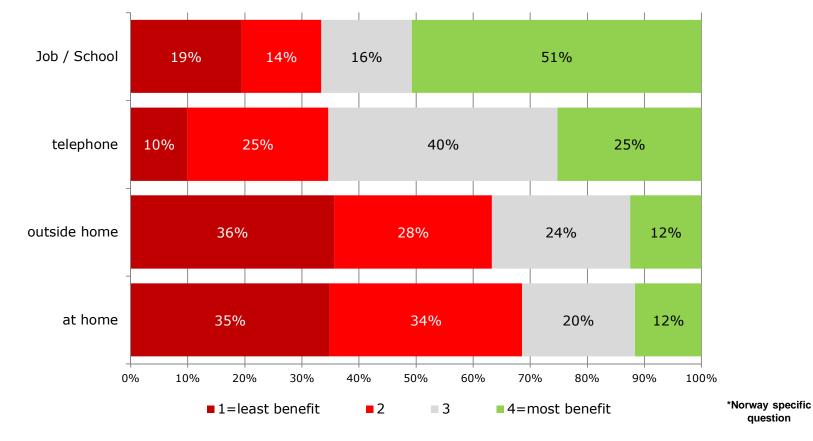




Situations with most benefit from hearing aids

In what situations do you best benefit from your hearing aids?*

[I hvilke situasjoner har du best nytte av høreapparatet ditt?]



Base: N=548







Positive impact of hearing aids, quality of life



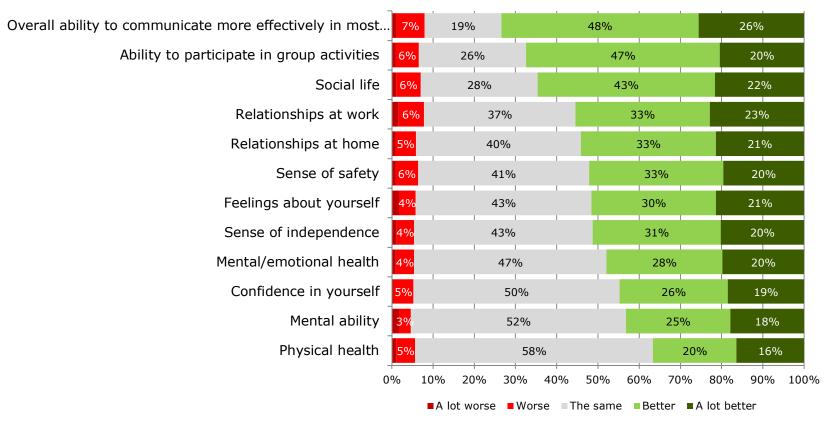






Significant positive impact of HAs on different aspects: Especially communication effectiveness, participation in group activities and social life improve with hearing aids.

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



HA-owner, n=548

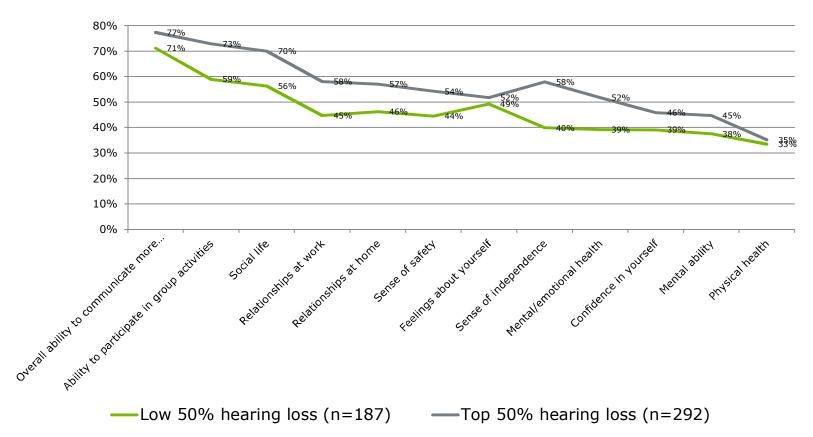






Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects





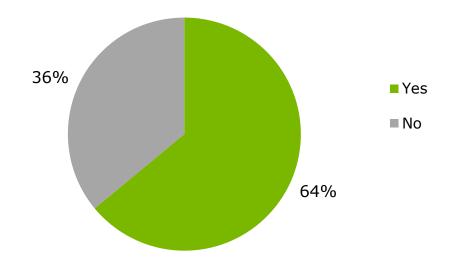






Almost 2 out of 3 hearing aid owners feel more confident moving in a city since wearing hearing aids!

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





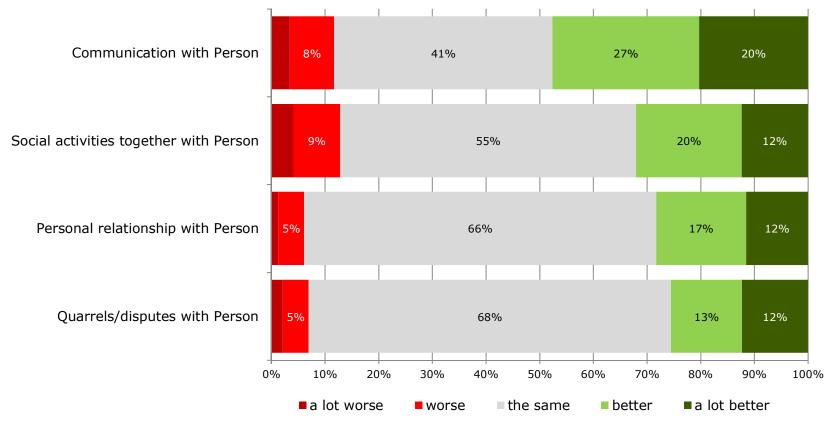






Even for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids

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



Someone in HH / parent has HA, n=436



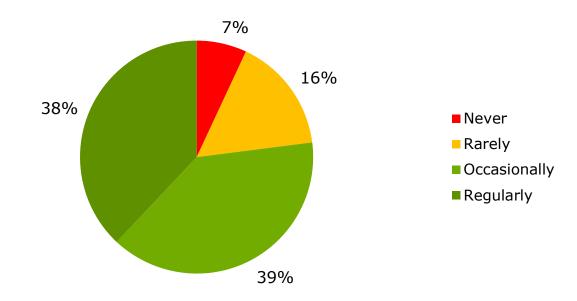






93% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes

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









4. Analysis of hearing impaired non-owners









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

Hearing loss characteristics: Owners compared to non-owners

	% HA Owner (n=548)		%HA-Non- owner Low 50% HL (n=259)	%HA-Non- owner Top 50% HL (n=127)	
Ears impaired					
Unilateral loss	20%	,)	41%	27%	
Bilateral loss	80%		59%	73%	
			More similar		
Perceived loss			hearing loss- structure	<u>ь</u> г	
Mild	16%	5	47%		7%
Moderate	59%	, 5	49%		58%
Severe	21%	, 5	4%		31%
Profound	4%		1%		3%









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

Uncomfortable Hearing loss not severe enough They do not work well in noisy situations Have more serious priorities Hear well enough in most situations Would be embarrassed to wear a hearing aid Have not had hearing tested yet They do not restore your hearing to normal Have hearing loss only with high pitch sounds Another hearing aid owners opinion

_									
e	419	%		28%	6		320	%	
ר 🗌	35%			29%			35%		
5	38%	0		23%			39%		
5	22%	2	9%			49	1%		
5	26%	2	23%			52%	6		
	32%		13%			56%			
t	36%		7%			56%			
	30%	1	2%			57%			
5	21%	21%				58%			
י 📕	20%	20%				59%			
0%	10% 209	% 30%	40%	50%	60%	70%	80%	90%	100%
	Reason	Somewh	at a reaso	on	Not a re	ason			



Base: non owners Top 50% HL: n=127







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

Do not admit I have a hearing loss in public
Bad design
Ear doctors opinion (ENT)
Social / Family opinion such as child, spouse, friend
Have tinnitus (ringing in ears)
Have hearing loss only with low frequency sounds
Family doctors opinion (GP)
Have hearing loss in only one ear
Cannot afford a hearing aid
Have tried hearing aid and they do not work
Hearing Aid Dispenser/Audiologists opinion
Do not know where to get hearing aids
I have vision or dexterity problems
Had surgery - hearing aids wont help
Have Sensor-neural hearing loss (nerve deafness)
Hearing problem requires surgery
Do not trust Hearing Aid Dispenser/Audiologist
+

	34%		6%		60%			
ź	23%	1	6%		61%			
	26%		12%		62%			
20)%	17	%		63%			
	29%		7%		64%			
13%		19%			68%			
179	%	14%			68%	,		
2:	L%	9%			70%	,		
2	1%	7%			71%			
13%	15	5%			72%			
180	%	9%			73%			
12%	9%				79%	,		
5%	15%				79%	,		
9%	10%			8	1%	,		
10% :	<mark>3%</mark>			87%	6	,		
10% 3	<mark>3%</mark>			87%	6			
4% <mark>6%</mark>				90%				
% 10	9% 20	% 30	0% 40%	50% 6	50% 70%	80%	90%	100

Reason
Somewhat a reason

Not a reason

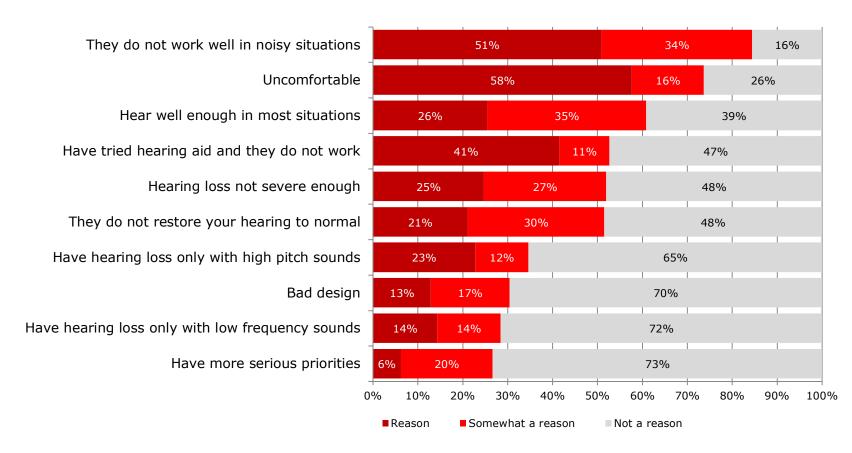
Base: non owners Top 50% HL: n=127







Top 10 reasons for HA owners NOT using them



Owners who don't use, n=38 (low sample!)









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









74% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.

Hearing aid owners: Hearing impaired non-owners: How often do you feel you are made How often do you feel you are made fun of or rejected because you are fun of or rejected because your wearing a hearing aid? hearing loss? 8% 2% 3% 32% 15% Never 40% Rarely Occasionally Regularly 74% 25%









Most important triggers to buy









The most important influencing factors are worsening hearing loss, ENT, GP and audiologist.

Owner: Thinking back to when you obtained your first hearing aid(s), Non-owner: Think about the option to obtain / purchase a hearing aid. what influenced you to obtain /purchase the hearing aid(s)? What do you think would influence you to obtain / purchase a hearing aid? 🖈 🍁 Hearing loss gest/got worse 57% ENT/ Ear Doctor *** *** 51% GP /Family doctor Hearing aid dispenser / Audiologist 28% **30% 📩 📩** Spouse 18% 19%23% Free due to coverage by Insurance / Received hearing aid. 14% Relative, friend 22% 15%20% Child 11%Another hearing aid owner (word of mouth) 23% Price of hearing aid 7% 25% 8% Safety concerns 15% 2% 11% Financial Situation improved ■ Owner (n=548) Co-worker or boss <mark>6%</mark>% Non-Owner (n=498) 4%% Information/advice about hearing loss from consumer.. 35% Internet: Websites of hearing aids manufacturers <u>2%</u>5% Hearing loss article or literature 23% TV advertisement Newspaper advertisement **╹**₩% 2% Internet: Websites of hearing aid clinics **3**‰ Radio advertisement *****=Top 5 influences for owners in EuroTrak 2012 7% Internet: Other websites, google... = Top 5 influences for non owners in EuroTrak 2012 12% Direct mail piece 13% Telemarketing phone call Celebrity or public Personality 1% Magazine advertisement F 12%





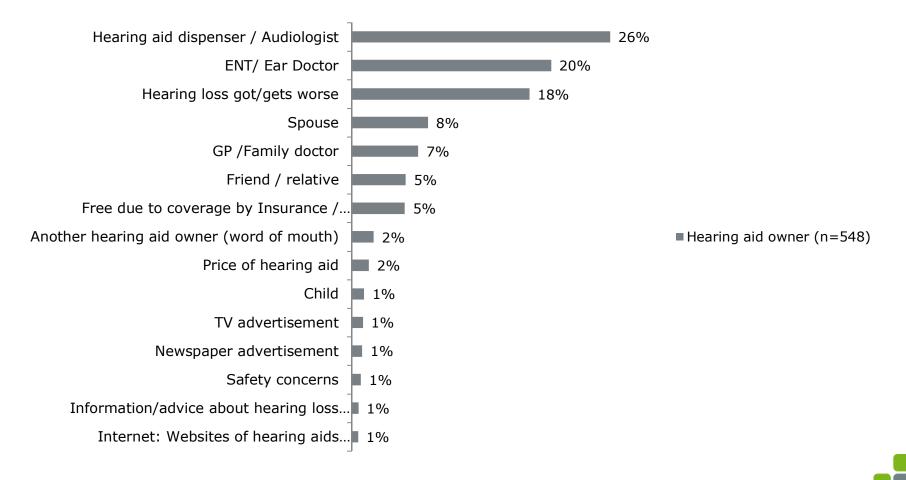




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The most important trigger to buy a hearing aid fur current HA owners was the audiologist.

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







and	ovum	
Christi	an Egger lic. phil.	
	n GmbH astrasse 25 6 Zürich	
Mobil	+41 (0)44 576 76 78 +41 (0)76 318 57 51 christian.egger@anovum.com	
www.ar	ovum.com	



rs /

him

Dr. Stefan Zimmer • Secretary General European Hearing Instrument Manufacturers Association Herriotstrasse 1 • 60528 Frankfurt am Main • Germany sz@ehima.com • +49-69-664 26 34 10 • www.ehima.com











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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 in an interval +-3.1 around 15% - which means between 11.9% and 18.1% (Conservative assumption: 95% confidence level)

Sample size	Random sample error				
	Real value is within interval:				
	Level of proportion: 50%/50%	Level of proportion: 15%/85%			
50	+- 13.9	+- 9.9			
100	+- 9.8	+- 7.0			
250	+- 6.2	+- 4.4			
500	+- 4.4	+- 3.1			
1000	+- 3.1	+- 2.2			
5′000	+- 1.4	+- 1.0			
10′000	+- 1.0	+- 0.7			



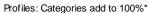






Demographics (1): Hearing instrument adoption rates and populations

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid	
Gender							
Male	6'172	9.9%	49.1%	50.2%	53.4%	53.4%	
Female	6'057	8.8%	49.0%	49.8%	46.6%	46.6%	
Age							
1 - 14	2'200	3.0%	46.1%	19.2%	6.2%	5.5%	
15 - 24	1'513	4.2%	21.2%	13.1%	8.7%	2.4%	
25 - 34	1'711	5.7%	47.5%	14.6%	8.8%	8.2%	
35 - 44	1'611	5.4%	27.7%	13.7%	10.8%	4.3%	
45 - 54	1'690	7.5%	30.4%	14.1%	15.2%	6.9%	
55 - 64	1'433	10.4%	50.7%	11.6%	12.6%	13.5%	
65 - 74	1'197	17.2%	58.4%	8.9%	14.8%	21.5%	
74+	875	39.3%	61.2%	4.8%	23.0%	37.6%	
Type of household							
single household	1'785	16.7%	50.8%	13.4%	25.3%	27.0%	
Couple, no kids	3'059	12.2%	58.2%	24.2%	26.8%	38.8%	
Couple with kid(s)	5'060	5.6%	41.9%	43.1%	28.4%	21.2%	
Single mom/dad with kid(s)	1'037	5.4%	33.2%	8.8%	6.4%	3.3%	
Retirement home, hospital etc.	92	45.3%	61.5%	0.5%	2.8%	4.6%	
Other	1'196	7.4%	32.1%	10.0%	10.3%	5.1%	











Demographics (2) Hearing instrument adoption rates and populations

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
Status						
The head of the household (alone or together with someone)	6'061	12.3%	53.4%	48.0%	59.7%	70.9%
The spouse of the head of the household	2'418	10.4%	51.0%	19.5%	21.3%	23.0%
Daughter/son of head of household	2'995	2.9%	20.8%	26.2%	11.8%	3.2%
Other person	755	7.7%	27.7%	6.3%	7.2%	2.9%
Employment						
Full time employed	4'130	6.4%	34.2%	43.6%	32.4%	17.2%
Part time employed	1'112	6.2%	48.9%	11.8%	6.5%	6.4%
Unemployed / not working	737	7.2%	24.9%	7.7%	7.4%	2.5%
Retired under a disability pension scheme (fully or partly)	973	14.6%	52.3%	9.4%	12.5%	14.1%
Early retired under an early retirement benefit scheme	258	18.7%	67.7%	2.4%	2.9%	6.2%
Retired (at the official retirement age)	1'612	27.9%	61.5%	13.1%	32.0%	52.4%
Student / pupil / in training	1'106	3.6%	16.1%	12.0%	6.2%	1.2%
Education						
Grunnskole	454	24.9%	55.5%	3.8%	9.3%	11.9%
Ungdomsskole	891	14.6%	51.6%	8.6%	11.7%	12.7%
Videregående	3'793	9.7%	43.9%	38.6%	38.4%	30.7%
Universitet eller høyskole, 1-3 år	2'254	9.5%	49.0%	23.0%	20.2%	19.9%
Universitet eller høyskole, over 3 år	2'022	8.4%	57.3%	20.9%	13.4%	18.4%
Annet	513	13.9%	47.0%	5.0%	7.0%	6.4%



