Results

EuroTrak Denmark 2022

1. Introduction
2. Market overview
3. Analysis of hearing aid owners
4. Analysis of hearing impaired non-owners
5. Appendix
EuroTrak Denmark 2022 is part of the EuroTrak / APACTrak studies:

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

Sample sizes:
Representative sample (sample 1): n=13’801 people
Hearing impaired (sample 2):
  HA owners: n= 573 people
  Hearing impaired non-owners: n= 736 people
Summary – Market overview

- **Stated hearing loss prevalence**
  - Total: 10.9%, 18+: 12.9% (2016: 10.3%, 18+: 12.1%).
  - Hearing Tests: 33% (2016: 38%) had a hearing test in the last 5 years, most tests done by ENTs.

- **Hearing aid adoption rate (HA penetration)**
  - 55.4% of those with self declared HL (2016: 53.0%).
  - 6.0% of total population (2016: 5.5%).
  - 76% of HA owners have binaural treatment (2016: 77%).

- **The route to the hearing aid**
  - 70% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor. (2016: 68%)
  - 56% got positive medical advice from the ENT or family doctor (drop out rate=20% / 2016: 18%).
  - 61% of the GP consultations referred to an ENT, 7% recommended no action (2016: 9%).
  - 33% of ENT consultations referred to an audiologist, 53% recommended to get a hearing aid, 20% recommended no action (2016: 20%).
  - A minority (13%) would be inclined to get a solution without professional support. Self adjustment is the most often mentioned reason for such a solution, followed by being fast and low cost.

- **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 – Analysis of hearing aid owners

- Hearing aid ownership, usage and accessories
  - 45% of the currently owned HAs were bought in 2019 or later.
  - The average age of the currently owned HAs is 5.1 years.
  - The median age of hearing aids before replacement is 4 years.
  - On average, HAs are worn 8.9 hours a day.
  - 63% of today’s hearing aid owners know their hearing aid brand by heart.
  - 25% of the HA owners use an accessory/app for their hearing aids, 63% of those are satisfied with it.

  - 51% have heard of remote fitting options. 7% of the HA owners have already used remote fitting.
  - Main reason to use it: It’s a modern way – Main reason not to use it: Preference of a personal visit

- Importance of listening situations and satisfaction with HAs
  - 55% of the hearing aid owners say their hearing aid works better than or as expected
  - 74% of the HA owners are satisfied with their HAs (2016: 71%).
  - The more hours worn per day, the higher the satisfaction with the HA.
  - Satisfaction with newer hearing aids is higher than with older hearing aids.
  - Talking at home with family members, talking on a phone and conversations are the most important listening situations.

- Positive impact of HAs
  - Significant positive impact of HAs on different aspects: Especially Communication effectiveness, ability to participate in group activities and social life improve with hearing aids.
  - 94% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
Summary – Analysis of hearing impaired non-owners

- **Reasons not to own/use HAs**
  - The main reasons for not using hearing aids are that people (think)
    - that hearing loss is not severe enough
    - they hear enough in most situations
    - they think that hearing aids are uncomfortable
    - and they do not restore hearing to normal.
  - 7% who own hearing aids don’t use them at all (0 hours); 15% use them less than one hour/day (0-1 hour).

- **Social rejection and triggers to buy**
  - 66% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids.
    It is more likely somebody makes fun or rejects a hearing impaired without hearing aid (only 41% say they are never made fun of because of their hearing loss).
  - The most important influencing factors to get a hearing aid are
    - worsening hearing loss
    - doctors and significant others
    - price
Detailed Results: Roadmap

1. **Introduction**
   - Organisation of EuroTrak 2022
   - Recruitment process: In search of hearing impaired people

2. **Market overview**
   - Prevalence of hearing loss and hearing aid adoption rate
   - Hearing tests and where hearing is tested
   - The route to the hearing aid: Sources of information and drop-out rates
   - Solution without professional support
   - 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
   - Remote fitting
   - 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 2021

**Organisation**
- Principal of the project EuroTrak 2022 is LFH.
- Anovum Zurich developed the concept of EuroTrak, designed the questionnaire and conducted the fieldwork in cooperation with a panel company. Furthermore Anovum analysed the data and prepared the presentation.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire.

**Use of the data**
- LFH and EHIMA may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.
- The raw dataset remains at Anovum. If the principal uses the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:
  “Source: Anovum – EuroTrak/2022/n=[relevant sample size]”
- Member companies of the principal can ask Anovum to further analyse the raw data in specific ways at their own expense.
Recruitment process: In search of hearing impaired people

**Step 1: Screening interviews**

Objective: Prevalence of hearing loss and hearing aid ownership

Process:
1. Representative sample with strict quotas that represent the overall population (Age/Gender interlocked; soft quota on region)
2. Contacts from large panelist pools
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of \( n=13'801 \) 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: \( n=573 \) hearing aid owners and \( n=736 \) hearing impaired non-owners
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age

<table>
<thead>
<tr>
<th>Age group</th>
<th>Women: Unimpaired non-owner</th>
<th>Women: Impaired non-user</th>
<th>Women: HA owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;= 14</td>
<td>0.2%</td>
<td>8.0%</td>
<td>0.1%</td>
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<tr>
<td>15 - 24</td>
<td>0.2%</td>
<td>5.9%</td>
<td>0.1%</td>
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<td>25 - 34</td>
<td>0.2%</td>
<td>6.4%</td>
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<td>35 - 44</td>
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<td>5.4%</td>
<td>0.3%</td>
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<tr>
<td>45 - 54</td>
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<td>6.0%</td>
<td>0.3%</td>
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<tr>
<td>55 - 64</td>
<td>0.5%</td>
<td>5.5%</td>
<td>0.4%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>0.7%</td>
<td>3.9%</td>
<td>0.4%</td>
</tr>
<tr>
<td>74+</td>
<td>1.1%</td>
<td>2.7%</td>
<td>0.5%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Age group</th>
<th>Men: Unimpaired non-owner</th>
<th>Men: Impaired non-user</th>
<th>Men: HA owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;= 14</td>
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<td>55 - 64</td>
<td>0.5%</td>
<td>5.9%</td>
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<tr>
<td>65 - 74</td>
<td>0.7%</td>
<td>3.9%</td>
<td>0.4%</td>
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<tr>
<td>74+</td>
<td>1.1%</td>
<td>2.7%</td>
<td>0.5%</td>
</tr>
</tbody>
</table>
Hearing loss prevalence Denmark
Self declared hearing loss

% hearing loss prevalence

- Total
  - EuroTrak 2022: 10.9%
  - EuroTrak 2016: 10.0%
  - EuroTrak 2012: 10.3%
- Total 18+
  - EuroTrak 2022: 12.9%
  - EuroTrak 2016: 12.9%
  - EuroTrak 2012: 12.1%
- 74+
  - EuroTrak 2022: 33.1%
  - EuroTrak 2016: 33.9%
  - EuroTrak 2012: 34.9%
- 65-74
  - EuroTrak 2022: 20.4%
  - EuroTrak 2016: 22.5%
  - EuroTrak 2012: 22.1%
- 55-64
  - EuroTrak 2022: 12.4%
  - EuroTrak 2016: 12.4%
  - EuroTrak 2012: 12.9%
- 45-54
  - EuroTrak 2022: 8.3%
  - EuroTrak 2016: 8.1%
  - EuroTrak 2012: 7.6%
- 35-44
  - EuroTrak 2022: 6.2%
  - EuroTrak 2016: 6.2%
  - EuroTrak 2012: 5.9%
- 25-34
  - EuroTrak 2022: 5.7%
  - EuroTrak 2016: 5.9%
  - EuroTrak 2012: 6.3%
- 15-24
  - EuroTrak 2022: 3.1%
  - EuroTrak 2016: 3.2%
  - EuroTrak 2012: 3.5%
- <=14
  - EuroTrak 2022: 3.2%
  - EuroTrak 2016: 3.5%
  - EuroTrak 2012: 3.2%
Hearing aid adoption rate: 55% of hearing impaired have hearing aid(s), 76% of them have binaural treatment.
Overview hearing loss prevalence and hearing aid adoption

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

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

EuroTrak 2022
- Hearing impaired (stated): 10.9%
- HA Adoption rate (% of population): 6.0%
- HA Adoption rate (% of stated impaired): 55.4%
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).

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

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Hearing loss characteristics: Owners compared to non-owners

<table>
<thead>
<tr>
<th></th>
<th>HA-Non-owner n=573</th>
<th>HA Owner n=736</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong> (stated)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>40%</td>
<td>17%</td>
<td>39%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>60%</td>
<td>83%</td>
<td>67%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>59%</td>
<td>23%</td>
<td>34%</td>
</tr>
<tr>
<td>Moderate</td>
<td>30%</td>
<td>47%</td>
<td>68%</td>
</tr>
<tr>
<td>Severe</td>
<td>7%</td>
<td>20%</td>
<td>78%*</td>
</tr>
<tr>
<td>Profound</td>
<td>4%</td>
<td>10%</td>
<td></td>
</tr>
</tbody>
</table>

* combined “severe” and “profound” because n is too small
Hearing tests and where hearing is tested
Hearing Tests: 33% had a hearing test in the last 5 years (2016: 38%). Most tests are done by ENTs.

Have you ever taken a hearing test?
- Yes, in the last 12 months: 12%
- Yes, in the last 1-5 years: 21%
- Yes, more than 5 years ago: 37%
- No, never: 31%

Where/how was your hearing tested?
- Ear doctor (ENT): 42%
- Family doctor: 21%
- Private hearing clinic: 17%
- Hospital audiologist: 14%
- Online test, smartphone app: 2%
- Other: 9%
- Don’t know: 7%

Base=9'911
The route to the hearing aid:
Sources of information and drop-out rates
Where did you gather information about hearing aids?

- **Ear doctor (ENT)**: 49%
- **Internet research combined**: 23%
- **Private clinic**: 18%
- **Conversations with friends, relatives already fitted with a hearing aid**: 15%
- **Family doctor**: 15%
- **Internet research: websites of hearing aids manufacturers**: 12%
- **Internet research: other websites, google…**: 9%
- **Internet research: websites of hearing aid clinics**: 9%
- **Articles in magazines or newspapers**: 9%
- **Print ads received in your mailbox**: 9%
- **Other**: 6%
- **I did not gather information about hearing aids**: 60%

ENTs are the most important sources of information and therefore the major gatekeepers.
Of those who discussed the hearing loss with a doctor, 57% talked to an ENT first

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

- Impaired: 100%
- Discussed hearing loss with ear doctor and/or family doctor: 70%
- Positive medical advice (ear doctor or family doctor recommend further action): 56%
- Discussed hearing loss with Hearing Care Specialist/Audiologist: 63%
- Positive advice Hearing Care Specialist/Audiologist: 56%
- Bought hearing aid: 55%

Drop out: 2016: 32%

Base: n=1'309
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=1'309
Recommendations by profession

- **GP**: 61% Referred to an ear doctor (ENT), 32% Referred to an audiologist, 15% Recommended to get a hearing aid, 7% Recommended no further action.
- **ENT**: 53% Referred to an ear doctor (ENT), 20% Referred to an audiologist, 11% Recommended to get a hearing aid, 89% Recommended no further action.
- **Audiologist**: 11% Referred to an ear doctor (ENT), 20% Referred to an audiologist, 11% Recommended to get a hearing aid, 89% Recommended no further action.

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A minority (13%) would be inclined to get a solution without professional support. Self adjustment is the most often mentioned reason for such a solution, followed by being fast and low cost.

Would you be inclined to choose a Hearing Solution which should not be fitted by a professional?

For what reason would you be inclined to choose a hearing solution which should not be fitted by a professional (public or private)?

- I want to be able to fit the sound myself whenever I want to
- I want a fast solution
- I want a low cost solution
- I want a solution that does not look like a hearing aid
- The professional system is too complex
- I do not want to spend time on finding out how I get governmental reimbursement
- I do not want to go to an ENT doctor
- None of the above

Denmark specific question
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?

- Of significant use: 57%
- Of some use: 30%
- Of no use: 13%

Base: n=172
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.
General health problems: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening) compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*).

Depression symptoms:
PHQ-2 Screening:
In the last 2 weeks:
• Little interest or pleasure
• Feeling down, depressed, hopeless

Base: hearing aid n=601 / top 50% HL, no hearing aid =107

*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).
In the evenings I often feel physically exhausted

In the evenings I often feel mentally exhausted

General health problems: Compared to impaired hearing aid non-owners with significant hearing loss (Top50% hearing loss group*), hearing aid owners feel less exhausted in the evenings

<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>15%</td>
<td>15%</td>
<td>30%</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>Top 50% hearing loss, no hearing aid</td>
<td>4%</td>
<td>18%</td>
<td>16%</td>
<td>27%</td>
<td>36%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
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<td>23%</td>
<td>22%</td>
<td>26%</td>
<td>17%</td>
<td>12%</td>
</tr>
<tr>
<td>Top 50% hearing loss, no hearing aid</td>
<td>12%</td>
<td>14%</td>
<td>26%</td>
<td>19%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Base: hearing aid n=583 / top 50% HL, no hearing aid =104

*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?

- Top 50% hearing loss, no hearing aid (n=107):
  - No: 47%
  - Yes: 53%

- Hearing aid (n=601):
  - No: 32%
  - Yes: 68%
Hearing impaired think that depression and sleeping disorders are most likely linked to one’s hearing loss

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

- Depression: 21%
- Sleeping disorder: 15%
- Dementia: 12%
- High blood pressure: 10%
- Diabetes: 6%
- Poor eyesight: 5%
- Back problems: 3%
- Hearing loss is not linked to any of those health issues: 63%

Hearing impaired, n=1’309
3. Analysis of hearing aid owners
Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
Low adoption rates within mild hearing loss

<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>(8%)</td>
<td>78%*</td>
</tr>
<tr>
<td>Severe</td>
<td>(14%)</td>
<td>68%</td>
</tr>
<tr>
<td>Moderate</td>
<td>(40%)</td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>(38%)</td>
<td>34%</td>
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</tbody>
</table>

Base: n=1'309
Sums can differ from 100% due to rounding
* combined “severe” and “profound” because n is too small
45% of the currently owned HAs were acquired in 2019 or later. RICs are the most often purchased type of HAs by far.

**Year of purchase**

- 2022: 5.1 years
- 2016: 4.2 years

**Type of HA**

- Behind the ear hearing aid with speaker in the ear connected by a thin wire: 63%
- Behind the ear hearing aid with a tube and earpiece: 20%
- In the ear hearing aid: 8%
- CI: 2%
- Other: 4%
- don't know: 4%

HA-owner, n=736
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?
- Yes: 49%
- No: 51%

How many years did you own your previous HAs?
- 1-3 years: 11%
- 4-6 years: 79%
- 7-10 years: 7%
- 11 years or longer: 3%

Base: n=364

Age of HA before it has been replaced:
- 2022: 4 years (median)
- 2016: 4 years (median)

Thinking back before you acquired your first hearing aid: How many years have passed since you became aware of your hearing loss until you acquired a hearing aid?
- 1 year: 21%
- 2 years: 32%
- 3 years: 19%
- 4-6 years: 18%
- more than 6 years: 11%

2022: Mean 3 years

Base: n=285
54% 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?

- Yes: 54%
- No: 46%

HA-owner, n=736

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:

- Better social life: 69%
- Better performance at work: 31%
- Less fatigue in the evening: 27%
- Better mental/emotional health: 26%
- Other opportunity: 7%

Base: n=393
90% received some kind of 3rd party reimbursement. Information deficit non-owners: Only 45% know whether government/insurance would pay

**Owners**: For the purchase of your hearing aid and for hearing services, which of these best describes how you paid for them?

- Yes, completely: 63%
- Yes, partly: 27%
- No: 7%
- I don’t know: 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?

- Yes, completely: 45%
- Yes, partly: 35%
- No: 20%
- I don’t know: 10%
Owners prefer the Public sector and Private clinics to obtain hearing aids. Non-owners tend to ENTs and the Public sector.

**OWNERS:**
Where was your most current hearing aid obtained?

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Public hearing clinic/hospital</td>
<td>47%</td>
</tr>
<tr>
<td>Private hearing clinic</td>
<td>36%</td>
</tr>
<tr>
<td>ENT</td>
<td>14%</td>
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<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>Don't know</td>
<td>2%</td>
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**NON OWNERS:**
If you were to get hearing aids, where would you go?

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Public hearing clinic/hospital</td>
<td>25%</td>
</tr>
<tr>
<td>Private hearing clinic</td>
<td>13%</td>
</tr>
<tr>
<td>ENT</td>
<td>30%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>Don't know</td>
<td>32%</td>
</tr>
</tbody>
</table>

Denmark specific question
**NPS place of purchase**

Recommendation intention of the place where the hearing aid(s) were obtained is good, with a positive NPS score of 20.

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

- **PROMOTERS** 48%
- **PASSIVES** 24%
- **DETRACTORS** 28%

NPS = PROMOTERS – DETRACTORS = 20

HA-owner, n=736
On average, HAs are worn 9.1 hours a day

How many hours a day are HA worn?

HA-owners, n=736

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

In the drawer (0 hours):
- 2022: 7%
- 2016: 8%
63% 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 (63%)
- No, but I could find out (16%)
- No, and can't find out (20%)

HA-owner, n=736
25% of the HA owners use an accessory/app for their hearing aids, 63% of those are satisfied with it.

Have you been informed by your hearing care professional about hearing aid accessories, such as TV-Streamer/ Apps / Remote Control / etc.? (HA owners, n=736)

- 53% Yes
- 38% No
- 9% don't know / no answer

Do you personally use accessories for your hearing aids (TV-Streamer/ Apps / Remote Control / etc.)? (HA owners, n=736)

- 25% Yes
- 76% No

**IF ACCESSORIES USED** (n=167):
Overall, how satisfied with the performance of your accessorie(s)?

- 15% very dissatisfied
- 21% dissatisfied
- 16% somewhat dissatisfied
- 21% neutral
- 15% somewhat satisfied
- 25% satisfied
- 22% very satisfied
51% have heard of remote fitting options. 7% of the HA owners have already used remote fitting.

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

- Yes, I have used it
- Heard of it but never used it
- No, never heard of it

How were you better helped with remote fitting? (n=89)

- It is a modern easy to use solution for me (44%)
- It allows to optimize settings for my real life situations (27%)
- I can save time, hassle and costs when I do not have to go to the hearing clinic (23%)
- I feel that there is easier access to the hearing clinic (20%)
- It is more safe in a pandemic situation we are in (4%)
- Other (2%)
- Don't know (16%)

Why didn’t you use remote fitting? (n=231)

- I prefer personal visits where I can hear and see the hearing care specialist (33%)
- No particular reason (29%)
- It is technically challenging (12%)
- I do not have a phone/tablet that is compatible (12%)
- I don’t think that my problems can be solved this way (10%)
- I am anxious of what happens to my personal data (9%)
- My Hearing Specialist does not recommend it (9%)
- Other (6%)

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Satisfaction with hearing aids and drivers
84% 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?

- Hearing aids work better than I expected: 55%
- Hearing aids work as I expected: 29%
- Hearing aids work worse than I expected: 16%

Base: n=736
Overall satisfaction with HA: 74% of hearing aid owners are satisfied with their hearing aid(s)

Overall satisfaction with HA: 74% of hearing aid owners are satisfied with their hearing aid(s)
Satisfaction with current hearing aids

**Dispenser**
- Professionalism of audiologist
- Quality of service during hearing aid fitting period
- Quality of audiologist counseling
- Quality of service after purchase

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

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

---

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

---

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Satisfaction with current hearing aids

<table>
<thead>
<tr>
<th>Listening situation</th>
<th>%dissatisfied</th>
<th>%satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversation with one Person</td>
<td>7%</td>
<td>84%</td>
</tr>
<tr>
<td>At home with family members</td>
<td>6%</td>
<td>81%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>7%</td>
<td>81%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>10%</td>
<td>80%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>10%</td>
<td>80%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>7%</td>
<td>80%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>9%</td>
<td>79%</td>
</tr>
<tr>
<td>Listening to Music</td>
<td>9%</td>
<td>79%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>12%</td>
<td>78%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>11%</td>
<td>77%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>12%</td>
<td>76%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>18%</td>
<td>75%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>12%</td>
<td>75%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>18%</td>
<td>74%</td>
</tr>
<tr>
<td>In a larger lecture hall (e.g., theater, concert hall, place of...)</td>
<td>11%</td>
<td>71%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>21%</td>
<td>69%</td>
</tr>
<tr>
<td>Use in noisy situations</td>
<td>12%</td>
<td>63%</td>
</tr>
</tbody>
</table>

*Trend*:

<table>
<thead>
<tr>
<th>Trend*</th>
</tr>
</thead>
<tbody>
<tr>
<td>+/-0%</td>
</tr>
<tr>
<td>+5%</td>
</tr>
<tr>
<td>+2%</td>
</tr>
<tr>
<td>+8%</td>
</tr>
<tr>
<td>+6%</td>
</tr>
<tr>
<td>+5%</td>
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<tr>
<td>+5%</td>
</tr>
<tr>
<td>+4%</td>
</tr>
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<td>+5%</td>
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<td>+6%</td>
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<td>+3%</td>
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<td>+7%</td>
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<tr>
<td>+2%</td>
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<tr>
<td>+5%</td>
</tr>
<tr>
<td>+2%</td>
</tr>
<tr>
<td>+3%</td>
</tr>
<tr>
<td>+5%</td>
</tr>
</tbody>
</table>

*% of satisfied HA owners compared to 2017

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Factors influencing satisfaction with current HA: Reliability, sound quality and signal processing are most important for overall satisfaction with HA

### HA Clinician
- Quality of service after purchase: 0.63
- Quality of service during hearing aid fitting period: 0.61
- Quality of audiologists counseling: 0.60
- Professionalism of audiologist: 0.59

### Sound quality signal processing
- Clearness of tone and sound: 0.74
- Richness or fidelity of sound: 0.73
- Natural sounding: 0.72
- Comfort with loud sounds: 0.69

### Product features
- Reliability: 0.74
- Value (performance versus money spent): 0.64
- Overall fit/Comfort: 0.64
- Managing whistling/feedback/buzzing: 0.63
- Visibility to others: 0.57
- Ease of changing battery: 0.53
- Battery life: 0.45

*The influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction, 1 means a maximal relationship.*
In which of these situations is it most important for you to hear well? (choose up to 5)

- At home with family members: 50%
- When talking on a phone: 47%
- In conversations with small groups: 44%
- In conversations with 1 person: 38%
- In conversations with large groups: 33%
- In noisy situations: 33%
- When watching TV with others: 32%
- When talking to children: 29%
- In the workplace: 26%
- In a larger lecture hall (e.g., theater, concert hall, place...): 20%
- When riding in a car: 15%
- In a store, when shopping: 12%
- When listening to music: 10%
- During leisure activities (e.g., exercising, taking a walk,...): 10%
- Outdoors: 8%
- In school or a classroom (as an observer or student): 7%
- At a movie theater: 7%

Hearing loss Total (n=1'309)
Hearing aid (n=736)
Hearing loss but no hearing aid (n=573)
Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially Communication effectiveness, ability to participate in group activities and social life improve with hearing aids.

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

Overall ability to communicate more effectively in most situations
- 4% a lot worse
- 30% worse
- 42% the same
- 20% better

Ability to participate in group activities
- 6% a lot worse
- 36% worse
- 37% the same
- 19% better

Social life
- 4% a lot worse
- 38% worse
- 38% the same
- 17% better

Relationships at home
- 3% a lot worse
- 45% worse
- 32% the same
- 17% better

Relationships at work
- 3% a lot worse
- 46% worse
- 31% the same
- 17% better

Physical health
- 5% a lot worse
- 47% worse
- 28% the same
- 17% better

Sense of safety
- 3% a lot worse
- 50% worse
- 29% the same
- 17% better

Mental/emotional health
- 5% a lot worse
- 47% worse
- 29% the same
- 16% better

Feelings about yourself
- 5% a lot worse
- 50% worse
- 27% the same
- 15% better

Confidence in yourself
- 3% a lot worse
- 52% worse
- 25% the same
- 16% better

Mental ability
- 3% a lot worse
- 54% worse
- 25% the same
- 14% better

Sense of independence
- 4% a lot worse
- 54% worse
- 24% the same
- 15% better
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in most aspects

% of HA owners feeling better/a lot better

Low 50% hearing loss (n=243)  Top 50% hearing loss (n=389)
51% of the hearing aid owners feel more confident moving in a city since wearing hearing aids!

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

Base: n=736
Also for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids.

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

- **Communication with Person**: 3% a lot worse, 9% worse, 40% the same, 35% better, 13% a lot better
- **Social activities together with Person**: 2% a lot worse, 6% worse, 61% the same, 24% better, 8% a lot better
- **Personal relationship with Person**: 4% a lot worse, 6% worse, 69% the same, 18% better, 8% a lot better
- **Quarrels/disputes with Person**: 2% a lot worse, 6% worse, 70% the same, 16% better, 6% a lot better

Someone in HH / parent has HA, n=661
94% of hearing aid owners declare that their hearing aids improve their quality of life at least occasionally

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

- 36% Regularly
- 22% Occasionally
- 36% Rarely
- 6% Never

Base: n=736
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

<table>
<thead>
<tr>
<th></th>
<th>HA Owner n=736</th>
<th>HA-Non-owner Low 50% HL n=286</th>
<th>Non-owner Top 50% HL n=136</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired (stated)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>17%</td>
<td>44%</td>
<td>32%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>83%</td>
<td>56%</td>
<td>68%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>23%</td>
<td>67%</td>
<td>24%</td>
</tr>
<tr>
<td>Moderate</td>
<td>47%</td>
<td>25%</td>
<td>53%</td>
</tr>
<tr>
<td>Severe</td>
<td>20%</td>
<td>6%</td>
<td>14%</td>
</tr>
<tr>
<td>Profound</td>
<td>10%</td>
<td>3%</td>
<td>9%</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>Not a reason</th>
<th>Somewhat a reason</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing loss not severe enough</td>
<td>39%</td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td>Hear well enough in most situations</td>
<td>41%</td>
<td>29%</td>
<td>30%</td>
</tr>
<tr>
<td>Uncomfortable</td>
<td>46%</td>
<td>20%</td>
<td>34%</td>
</tr>
<tr>
<td>They do not restore your hearing to normal</td>
<td>48%</td>
<td>22%</td>
<td>30%</td>
</tr>
<tr>
<td>They do not work well in noisy situations</td>
<td>51%</td>
<td>18%</td>
<td>31%</td>
</tr>
<tr>
<td>Have tinnitus (ringing in ears)</td>
<td>53%</td>
<td>15%</td>
<td>32%</td>
</tr>
<tr>
<td>Have hearing loss only with low frequency sounds</td>
<td>56%</td>
<td>21%</td>
<td>23%</td>
</tr>
<tr>
<td>Have more serious priorities</td>
<td>58%</td>
<td>18%</td>
<td>25%</td>
</tr>
<tr>
<td>Ear doctors opinion (ENT)</td>
<td>58%</td>
<td>9%</td>
<td>32%</td>
</tr>
<tr>
<td>Cannot afford a hearing aid</td>
<td>59%</td>
<td>10%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Base: non owners Top 50% HL: n=136

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

- Bad design: 20% Reason, 21% Somewhat a reason, 59% Not a reason
- Have hearing loss only with high pitch sounds: 19% Reason, 20% Somewhat a reason, 61% Not a reason
- Have not had hearing tested yet: 23% Reason, 15% Somewhat a reason, 63% Not a reason
- Family doctors opinion (GP): 24% Reason, 12% Somewhat a reason, 64% Not a reason
- Have Sensor-neural hearing loss (nerve deafness): 24% Reason, 12% Somewhat a reason, 64% Not a reason
- Have hearing loss in only one ear: 21% Reason, 14% Somewhat a reason, 65% Not a reason
- Hearing Care Professional/Audiologists opinion: 18% Reason, 16% Somewhat a reason, 65% Not a reason
- Have tried hearing aid and they do not work: 23% Reason, 6% Somewhat a reason, 71% Not a reason
- Do not admit I have a hearing loss in public: 13% Reason, 15% Somewhat a reason, 72% Not a reason
- Another hearing aid owners opinion: 12% Reason, 16% Somewhat a reason, 72% Not a reason
- Would be embarrassed to wear a hearing aid: 14% Reason, 14% Somewhat a reason, 73% Not a reason
- Do not know where to get hearing aids: 14% Reason, 10% Somewhat a reason, 75% Not a reason
- Do not trust Hearing Care Professional/Audiologist: 10% Reason, 11% Somewhat a reason, 79% Not a reason
- Social / Family opinion such as child, spouse, friend: 5% Reason, 12% Somewhat a reason, 83% Not a reason
- I have vision or dexterity problems: 9% Reason, 8% Somewhat a reason, 84% Not a reason
- Hearing problem requires surgery: 11% Reason, 5% Somewhat a reason, 85% Not a reason
- Had surgery - hearing aids wont help: 8% Reason, 3% Somewhat a reason, 88% Not a reason

Base: non owners Top 50% HL; n=136
Social rejection because of hearing loss compared to the acceptance of hearing aids
66% of hearing aid owners feel that people never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.

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

- 66% Never
- 24% Rarely
- 7% Occasionally
- 3% Regularly

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

- 41% Never
- 38% Rarely
- 19% Occasionally
- 3% Regularly

Base: n=736
Base: Top 50% hearing loss, no hearing aid n=136
Most important triggers to buy
The most important influencing factors to get a hearing aid are worsening hearing loss, doctors and significant others (+price, insurance coverage for the non owners)

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

**Non-owner:** What do you think would influence you to obtain / purchase a hearing aid?
The most important trigger to get a hearing aid is worsening hearing loss, free hearing aids, ENTs and the spouse.

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

- Hearing loss got/gets worse: 22%
- Free due to coverage by Insurance / Received hearing aid free of charge: 20%
- ENT/ Ear Doctor: 15%
- Spouse: 13%
- Hearing aid dispenser / Audiologist: 5%
- Friend / relative: 4%
- Child: 3%
- GP /Family doctor: 3%
- Another hearing aid owner (word of mouth): 2%
- Newspaper advertisement: 2%
Demographics (1) Hearing instrument adoption rates and populations

<table>
<thead>
<tr>
<th>Gender</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>6'075</td>
<td>11.9%</td>
<td>54.7%</td>
</tr>
<tr>
<td>Female</td>
<td>6'926</td>
<td>9.8%</td>
<td>58.4%</td>
</tr>
<tr>
<td>Age</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 - 14</td>
<td>2'249</td>
<td>3.1%</td>
<td>66.1%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>1'856</td>
<td>4.3%</td>
<td>50.0%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>1'844</td>
<td>6.4%</td>
<td>53.2%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>1'616</td>
<td>7.5%</td>
<td>41.0%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>1'815</td>
<td>8.3%</td>
<td>33.0%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>1'796</td>
<td>12.4%</td>
<td>44.8%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>1'462</td>
<td>20.4%</td>
<td>61.6%</td>
</tr>
<tr>
<td>75+</td>
<td>1'353</td>
<td>33.1%</td>
<td>67.9%</td>
</tr>
<tr>
<td>Type of household</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single household</td>
<td>1'624</td>
<td>18.1%</td>
<td>54.8%</td>
</tr>
<tr>
<td>Couple, no kids</td>
<td>3'067</td>
<td>13.5%</td>
<td>57.2%</td>
</tr>
<tr>
<td>Couple with kids(s)</td>
<td>6'577</td>
<td>8.3%</td>
<td>57.2%</td>
</tr>
<tr>
<td>Single mom/dad with kid(s)</td>
<td>1'994</td>
<td>7.2%</td>
<td>39.3%</td>
</tr>
<tr>
<td>Retirement home, hospital etc.</td>
<td>145</td>
<td>32.4%</td>
<td>68.5%</td>
</tr>
<tr>
<td>Other</td>
<td>1'984</td>
<td>9.3%</td>
<td>48.6%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%

<table>
<thead>
<tr>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>49.2%</td>
<td>55.6%</td>
<td>53.9%</td>
</tr>
<tr>
<td>50.8%</td>
<td>44.4%</td>
<td>46.1%</td>
</tr>
<tr>
<td>17.7%</td>
<td>3.5%</td>
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<td>13.0%</td>
<td>8.4%</td>
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<td>12.1%</td>
<td>10.9%</td>
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<td>21.0%</td>
<td>26.4%</td>
<td>20.5%</td>
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<td>49.0%</td>
<td>35.1%</td>
<td>37.7%</td>
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<td>9.0%</td>
<td>7.8%</td>
<td>4.0%</td>
</tr>
<tr>
<td>0.6%</td>
<td>2.2%</td>
<td>3.9%</td>
</tr>
<tr>
<td>8.8%</td>
<td>8.7%</td>
<td>6.6%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Status</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate% (Base=hearing impaired)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Head of the household (alone or together with someone)</td>
<td>6,356</td>
<td>14.6%</td>
<td>55.2%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>2,023</td>
<td>12.0%</td>
<td>56.9%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>3,209</td>
<td>2.6%</td>
<td>54.3%</td>
</tr>
<tr>
<td>Other person</td>
<td>913</td>
<td>8.6%</td>
<td>53.3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employment</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate% (Base=hearing impaired)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full time employed</td>
<td>5,056</td>
<td>8.3%</td>
<td>48.2%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>950</td>
<td>9.6%</td>
<td>47.7%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>637</td>
<td>7.1%</td>
<td>48.0%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>1,040</td>
<td>17.1%</td>
<td>52.6%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>2,140</td>
<td>28.5%</td>
<td>64.7%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>1,188</td>
<td>3.6%</td>
<td>29.5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate% (Base=hearing impaired)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folkeskole</td>
<td>1,011</td>
<td>16.3%</td>
<td>55.0%</td>
</tr>
<tr>
<td>Ungdomsuddannelse</td>
<td>1,051</td>
<td>7.0%</td>
<td>39.9%</td>
</tr>
<tr>
<td>Erhvervsuddannelse/mesterlære</td>
<td>2,986</td>
<td>15.9%</td>
<td>59.4%</td>
</tr>
<tr>
<td>Videregående uddannelse, kort - op til 3 år</td>
<td>1,501</td>
<td>11.5%</td>
<td>54.4%</td>
</tr>
<tr>
<td>Videregående uddannelse, mellemlang - 3-5 år</td>
<td>2,321</td>
<td>10.4%</td>
<td>46.4%</td>
</tr>
<tr>
<td>Videregående uddannelse, lang - mere end 5 år</td>
<td>1,117</td>
<td>9.8%</td>
<td>67.8%</td>
</tr>
<tr>
<td>Andet</td>
<td>607</td>
<td>10.5%</td>
<td>51.9%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%

<table>
<thead>
<tr>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>47.6%</td>
<td>67.1%</td>
<td>66.5%</td>
</tr>
<tr>
<td>20.2%</td>
<td>21.6%</td>
<td>23.1%</td>
</tr>
<tr>
<td>25.4%</td>
<td>5.6%</td>
<td>5.4%</td>
</tr>
<tr>
<td>6.8%</td>
<td>5.5%</td>
<td>5.0%</td>
</tr>
<tr>
<td>48.8%</td>
<td>33.8%</td>
<td>25.8%</td>
</tr>
<tr>
<td>8.6%</td>
<td>7.4%</td>
<td>5.5%</td>
</tr>
<tr>
<td>5.9%</td>
<td>3.6%</td>
<td>2.3%</td>
</tr>
<tr>
<td>3.1%</td>
<td>4.0%</td>
<td>2.3%</td>
</tr>
<tr>
<td>8.7%</td>
<td>13.1%</td>
<td>11.9%</td>
</tr>
<tr>
<td>15.4%</td>
<td>33.4%</td>
<td>50.2%</td>
</tr>
<tr>
<td>11.5%</td>
<td>4.7%</td>
<td>1.6%</td>
</tr>
<tr>
<td>15.2%</td>
<td>20.6%</td>
<td>20.6%</td>
</tr>
<tr>
<td>9.8%</td>
<td>6.9%</td>
<td>3.7%</td>
</tr>
<tr>
<td>25.2%</td>
<td>29.9%</td>
<td>35.8%</td>
</tr>
<tr>
<td>13.5%</td>
<td>12.2%</td>
<td>12.0%</td>
</tr>
<tr>
<td>20.8%</td>
<td>20.0%</td>
<td>14.2%</td>
</tr>
<tr>
<td>10.1%</td>
<td>5.5%</td>
<td>9.5%</td>
</tr>
<tr>
<td>5.5%</td>
<td>4.8%</td>
<td>4.2%</td>
</tr>
</tbody>
</table>

* Small sample sizes in some categories
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)

<table>
<thead>
<tr>
<th>Sample size</th>
<th>Random sample error</th>
<th>Real value is within interval:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Level of proportion: 50%/50%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Level of proportion: 15%/85%</td>
</tr>
<tr>
<td>50</td>
<td>± 13.9</td>
<td>± 9.9</td>
</tr>
<tr>
<td>100</td>
<td>± 9.8</td>
<td>± 7.0</td>
</tr>
<tr>
<td>250</td>
<td>± 6.2</td>
<td>± 4.4</td>
</tr>
<tr>
<td>500</td>
<td>± 4.4</td>
<td>± 3.1</td>
</tr>
<tr>
<td>1’000</td>
<td>± 3.1</td>
<td>± 2.2</td>
</tr>
<tr>
<td>5’000</td>
<td>± 1.4</td>
<td>± 1.0</td>
</tr>
<tr>
<td>10’000</td>
<td>± 1.0</td>
<td>± 0.7</td>
</tr>
</tbody>
</table>