

## Results

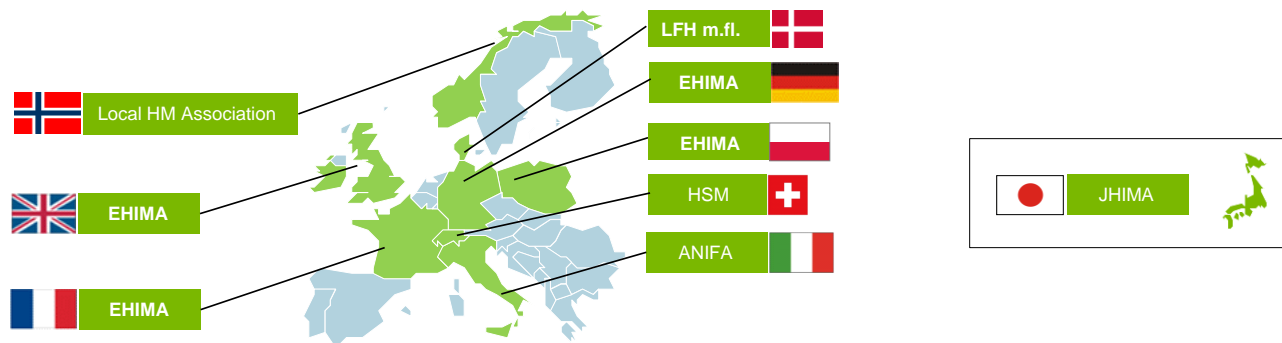
# EuroTrak Denmark 2016

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

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- 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

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- Hearing aid ownership and usage, accessories and Telecoil
  - 55% (2012: 60%) of all HA owners received 100% 3<sup>rd</sup> 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

# Summary

## 4. Analysis of hearing impaired non-owners

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- 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

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# 1. Introduction



# Organisation of EuroTrak 2016

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## 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

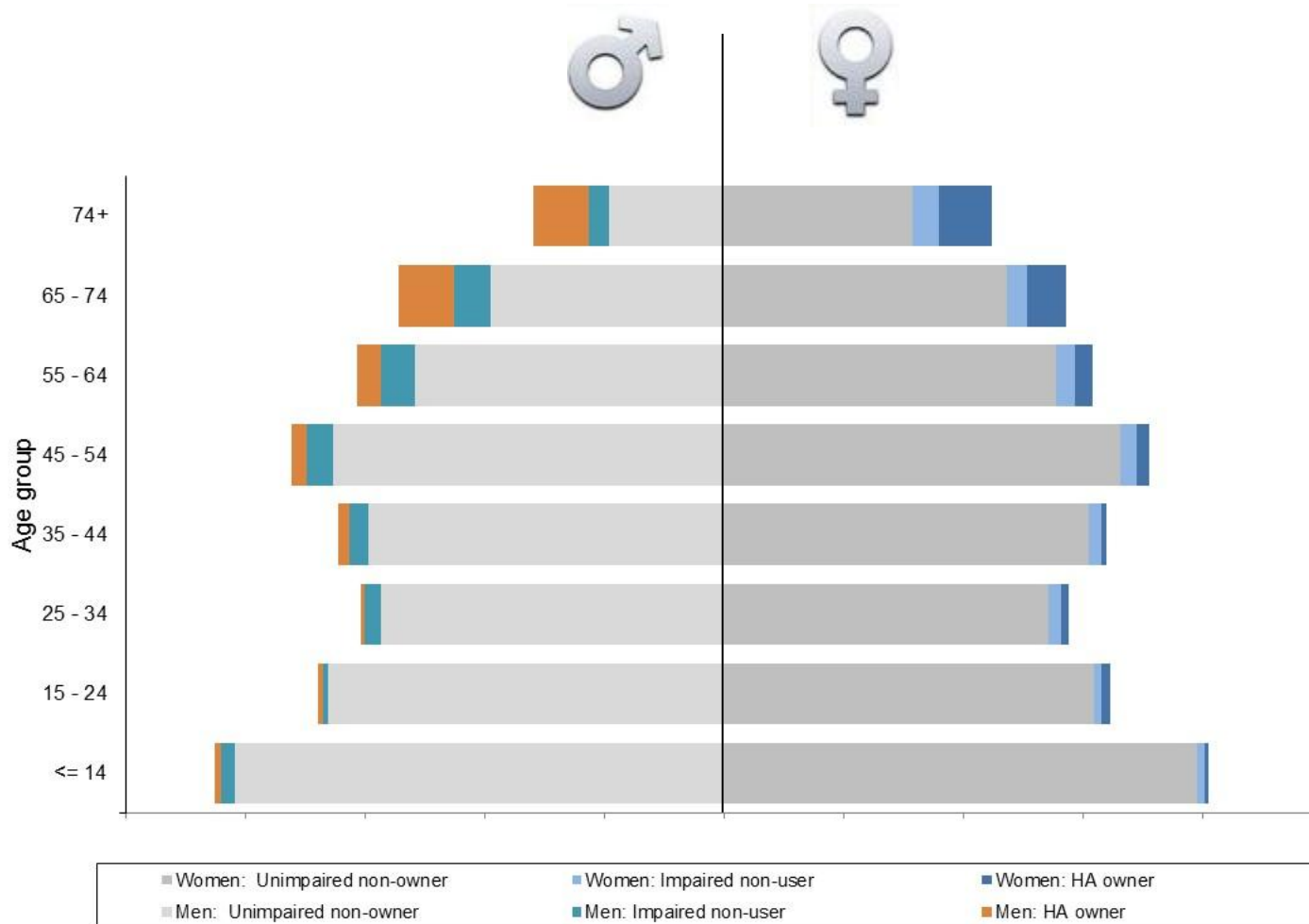
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## 2. Market overview

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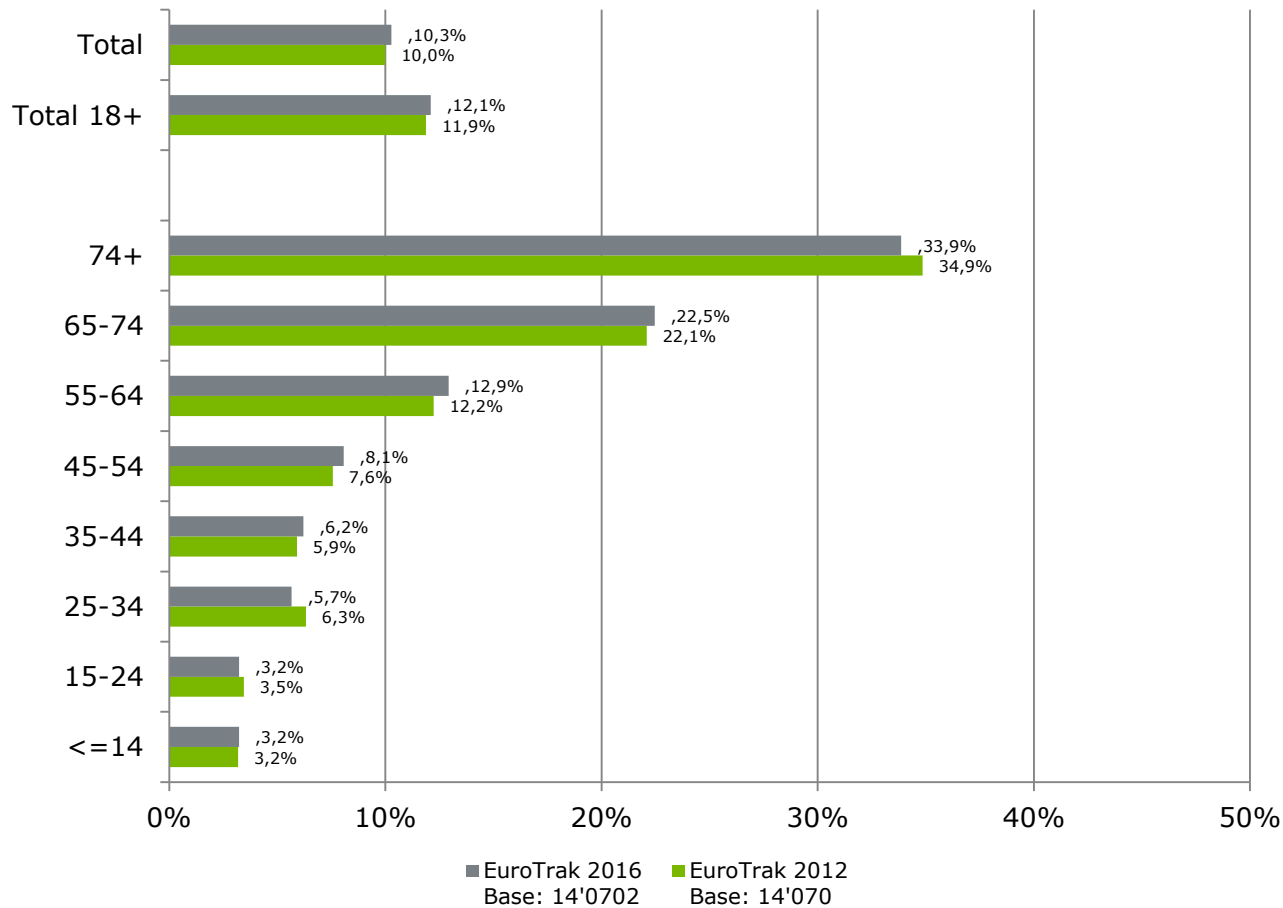
# Prevalence of hearing loss and adoption rate

# Hearing loss and hearing instrument ownership by gender/age

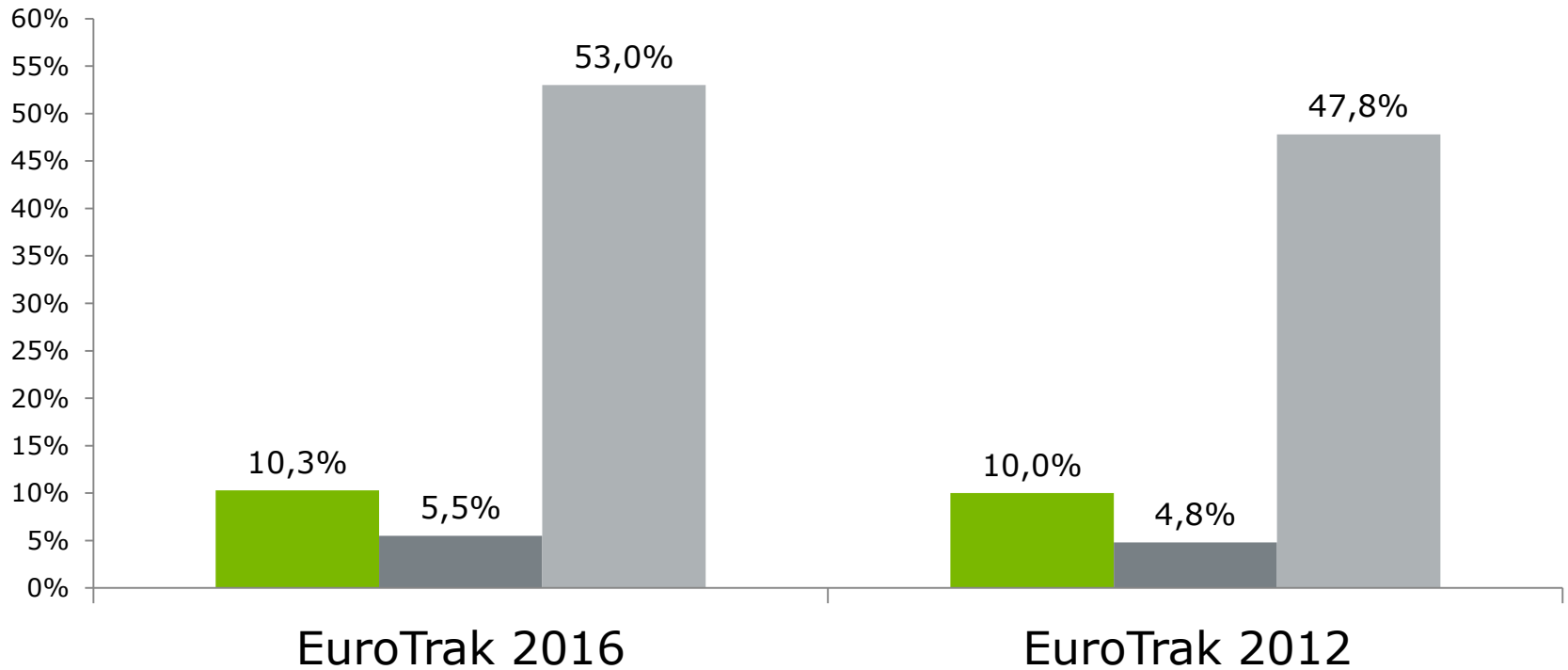


# Hearing loss prevalence Denmark

**% hearing loss prevalence**



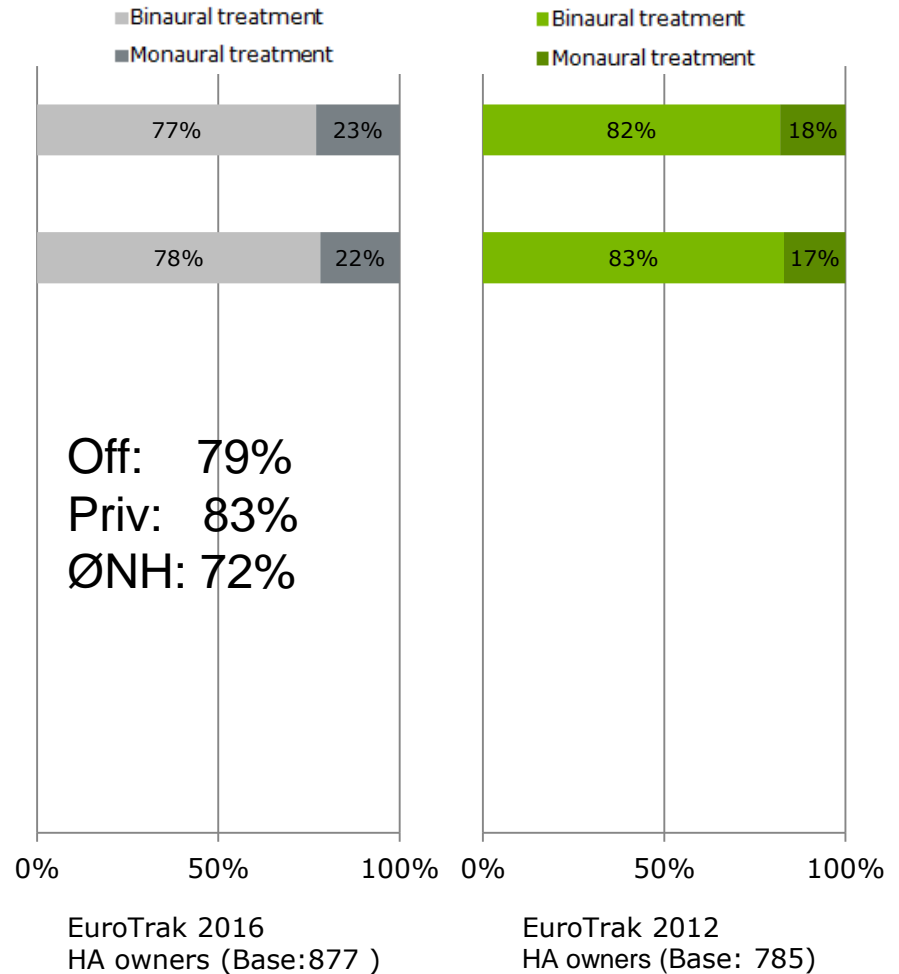
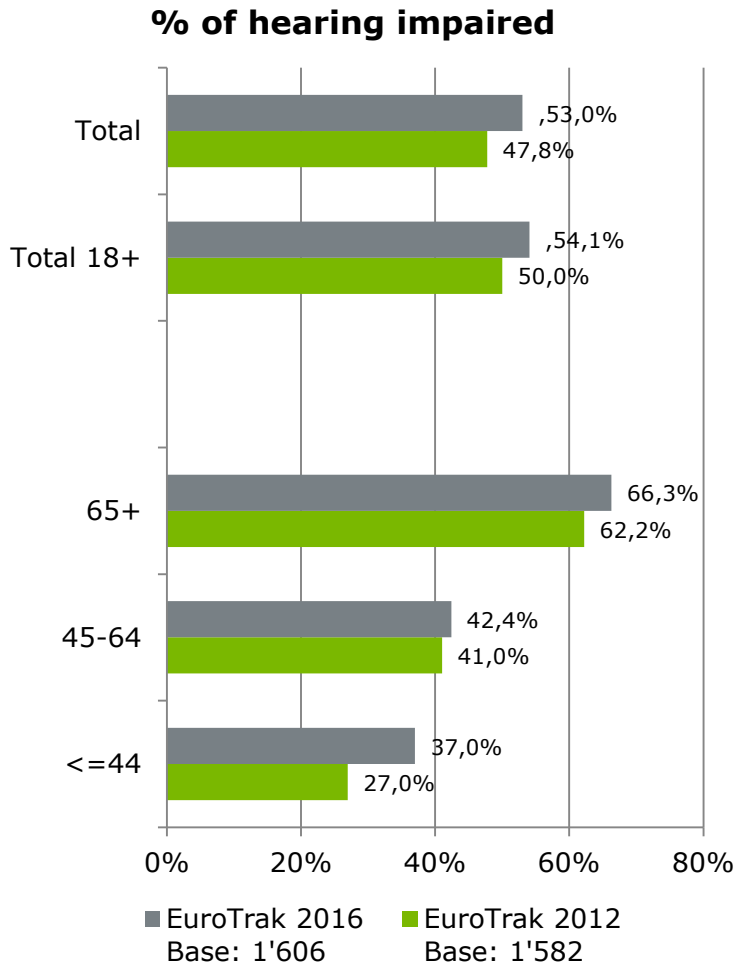
# Overview hearing loss prevalence and hearing aid adoption



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

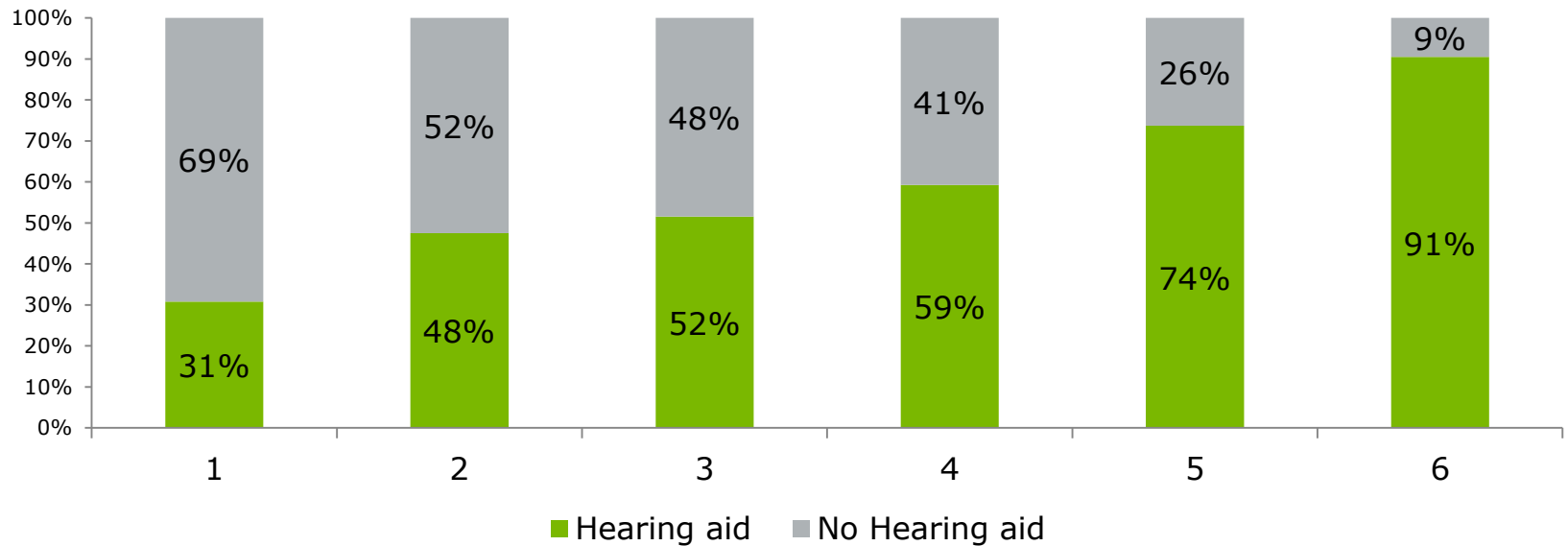


# Hearing aid adoption rate Denmark: 53% of hearing impaired have hearing aid(s), 77% of them have binaural treatment





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



Hearing loss 6-groups

Top 50% = gruppe 4+5+6:

Under 65 år: 45%

Erhvervsaktive: 32%

HA-non-owner, n=593  
HA-owner, n=711

\* Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

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



# Hearing loss

## Hearing loss characteristics: Owners compared to non-owners

	<b>HA-Non-owner</b> 2016: n=593 (2012: n=664)	<b>HA Owner</b> 2016: n=711 (2012 n= 656)	<b>Hearing Aid Adoption (%)</b>
<b>Ears impaired (stated)</b>			
Unilateral loss	42% (42%)	17% (15%)	36% (27%)
Bilateral loss	58% (58%)	83% (85%)	67% (60%)
<b>Perceived loss</b>			
Mild	69% (68%)	24% (21%)	31% (23%)
Moderate	23% (24%)	48% (48%)	73% (65%)
Severe	5% (4%)	21% (22%)	82% (78%*)
Profound	3% (4%)	8% (9%)	

n's are unweighted whereas the shown results are weighted  
 \* combined "severe" and "profound" because n is too small



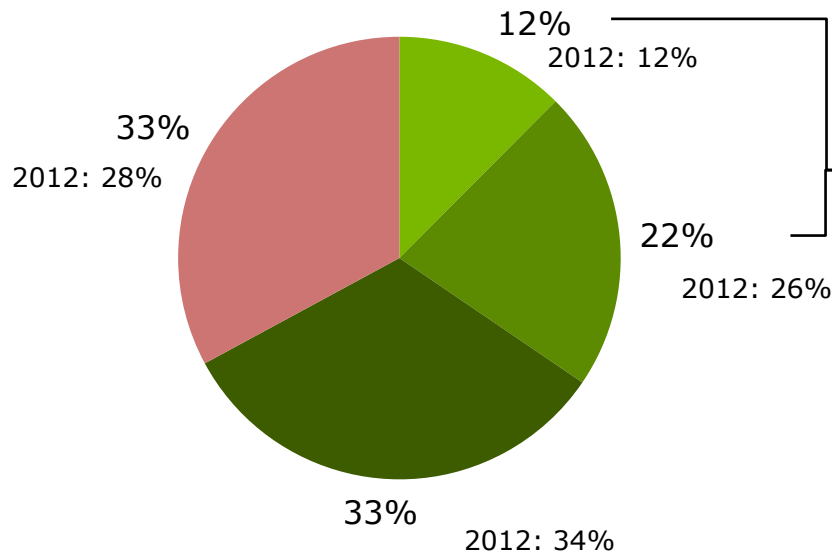
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# Hearing tests and where hearing is tested

# Hearing Tests: 34% (2012: 38%) had a hearing test in the last 5 years, most tests done by (ear) doctors

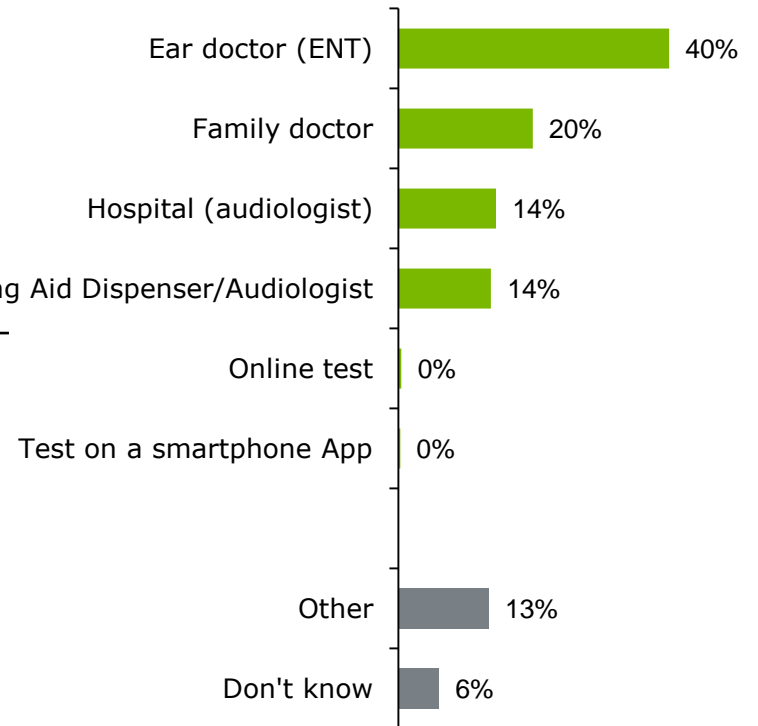
Have you ever taken a hearing test?

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



Base=9'536

Where/how was your hearing tested?



Base= 3'492

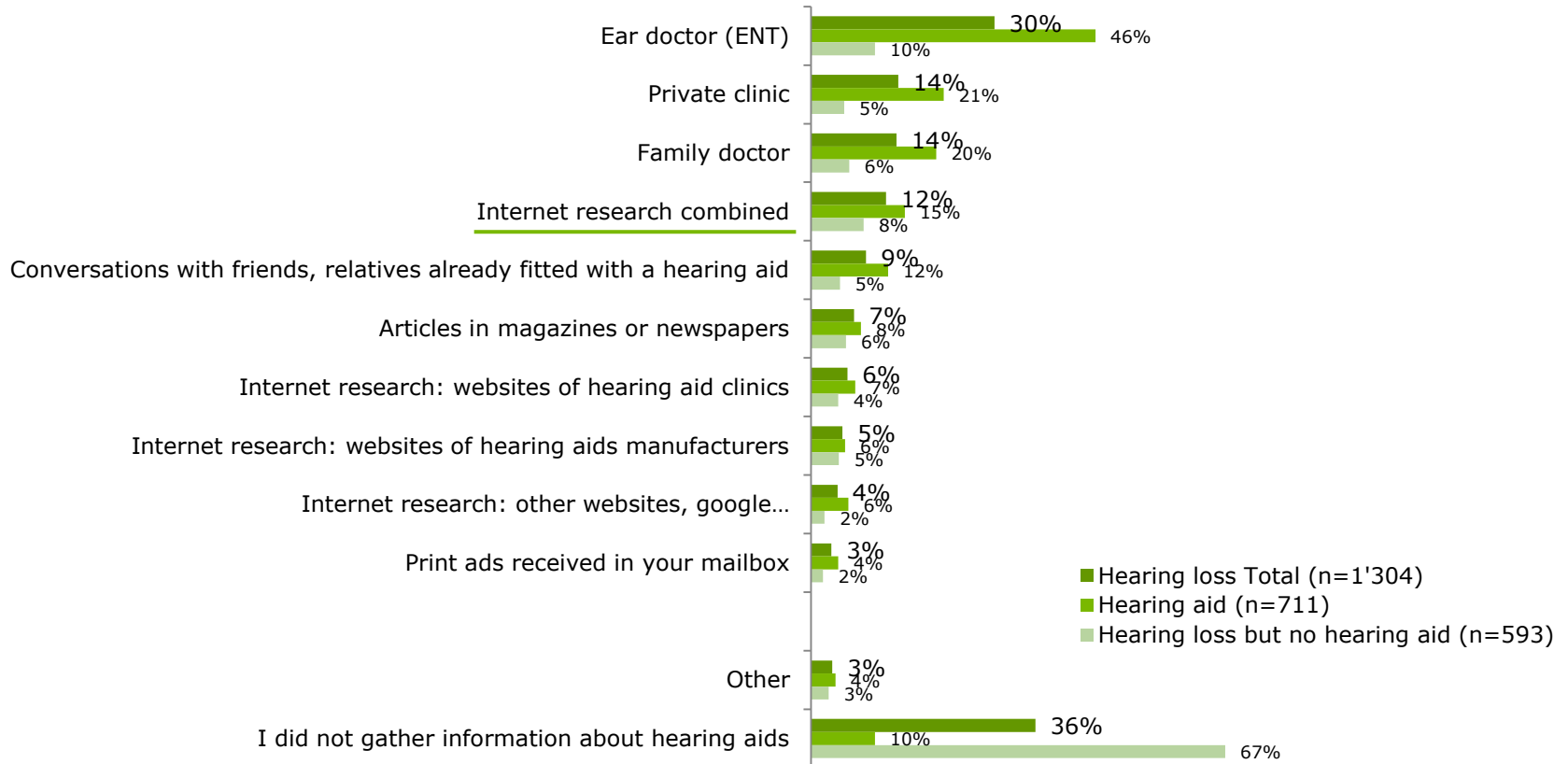


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# The route to the hearing aid: Sources of information and drop-out rates

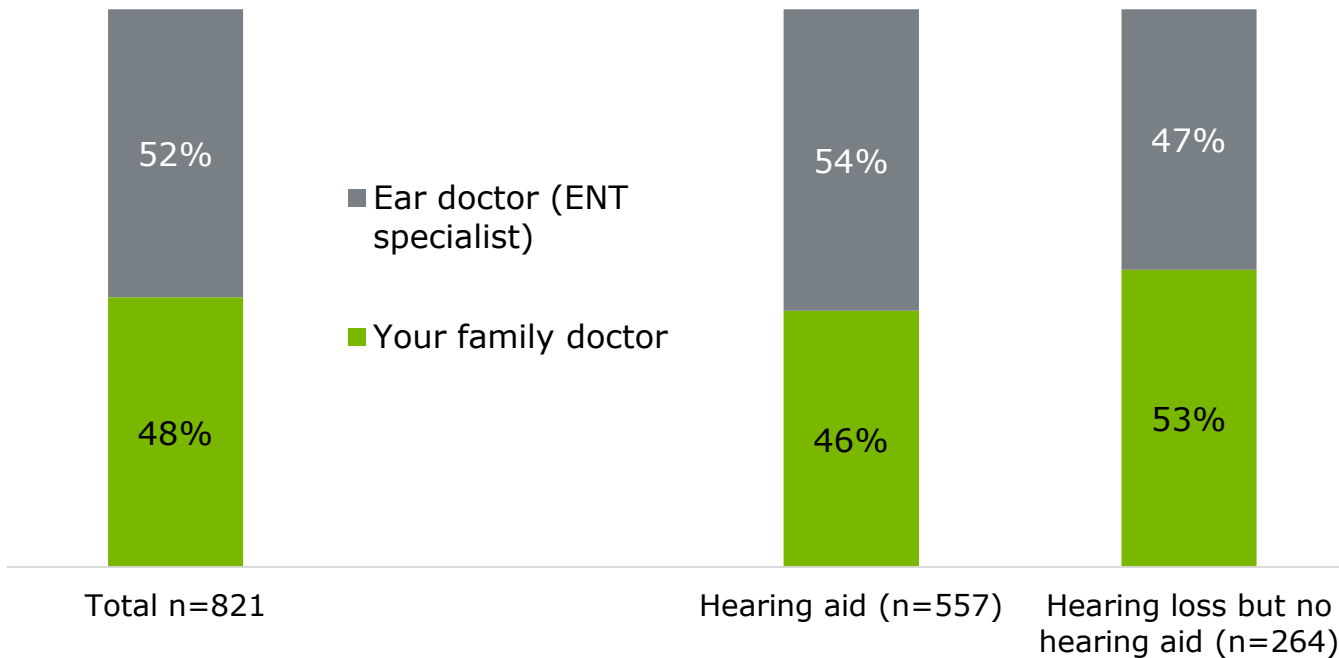
# Doctors are the most important source of information followed by the internet

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

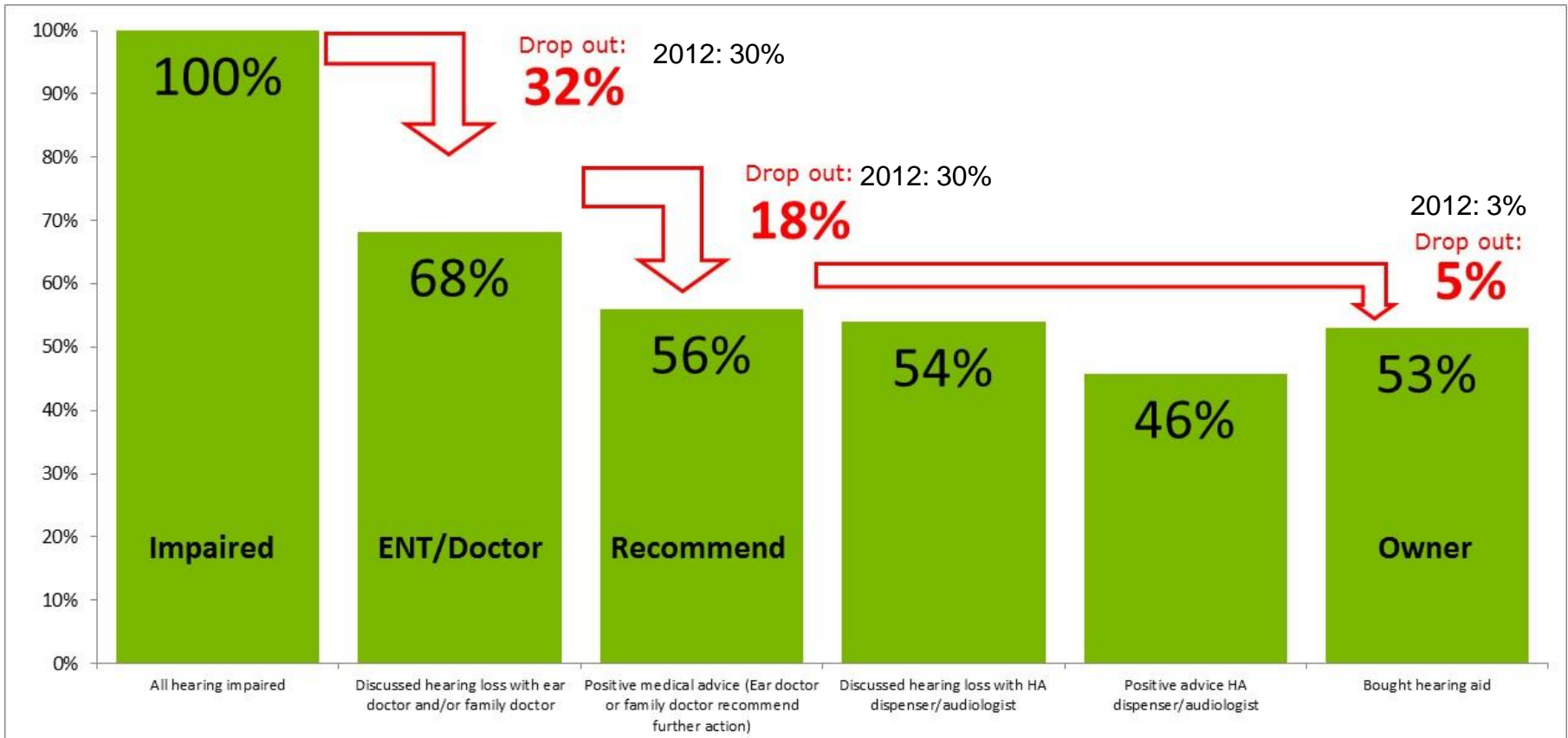


# Of those who discussed the hearing loss with a doctor, 52% talked to an ENT first and 48% talked to the family doctor first

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?



# The route to the hearing aid: Compared to 2012 drop out 2 was reduced

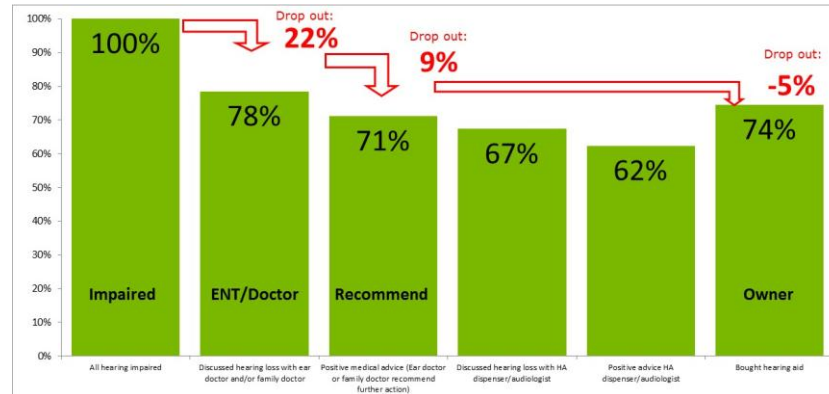


Base: n=1'304

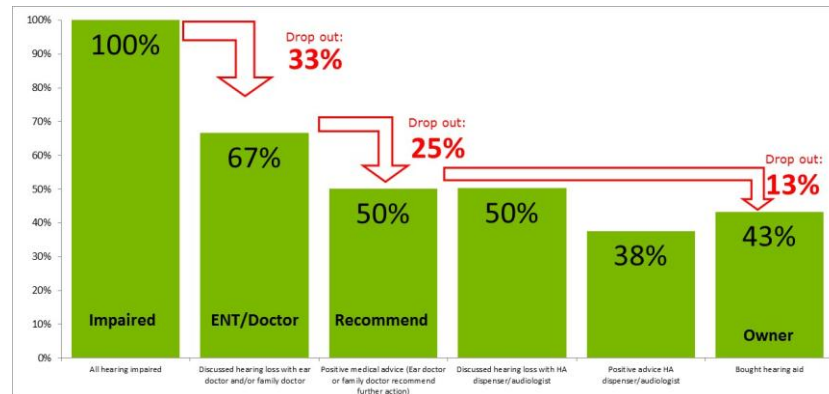


# Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss\*



Low 50% hearing loss\*



Base: n=1'304

\* 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:

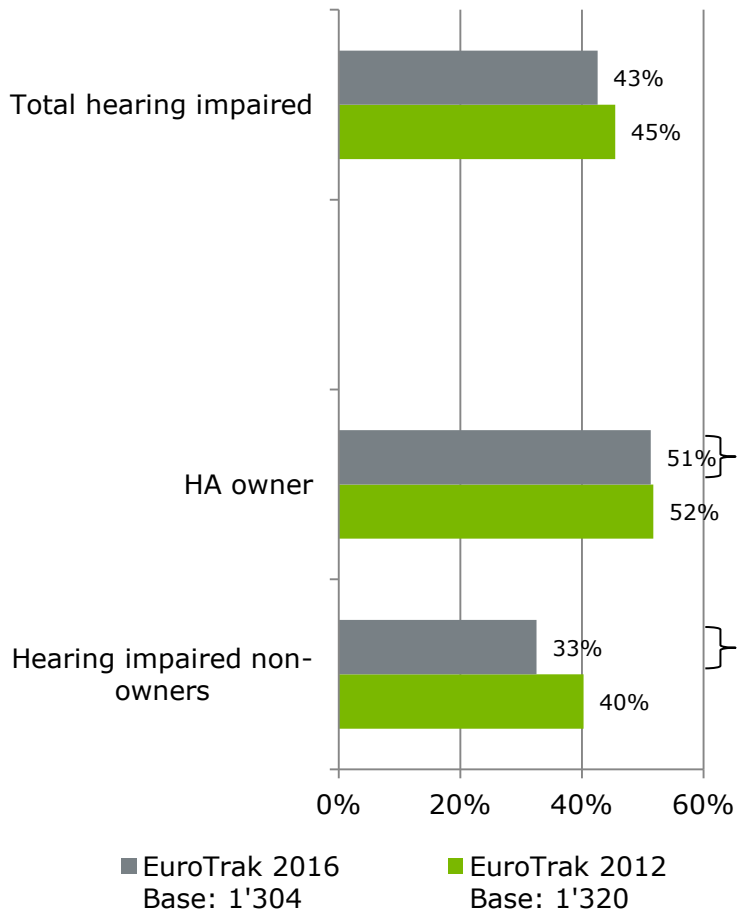
- Number of ears impaired (one or two)
  - Stated hearing loss (Mild to Profound)
  - Scores on 6 APHAB-EC - like questions (Scaled 1-5)
  - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67%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



# The route to the hearing aid: GP/Family doctor

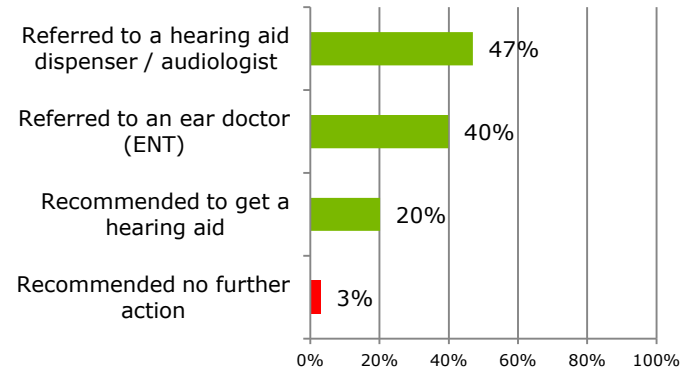
## Have you discussed your hearing problem with your family doctor?

**% Discussed with GP**

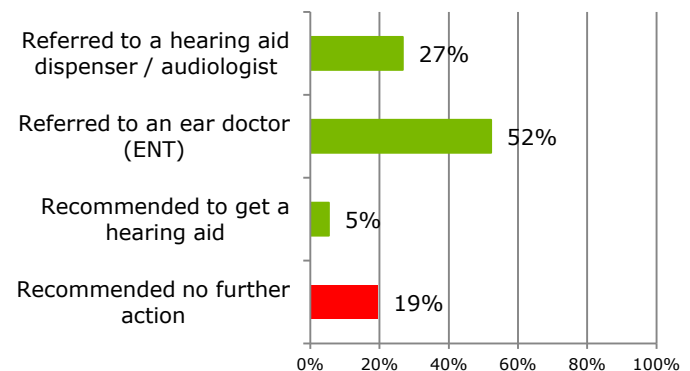


**What did he/she recommend ?**

**HA owner (Base: 352)**



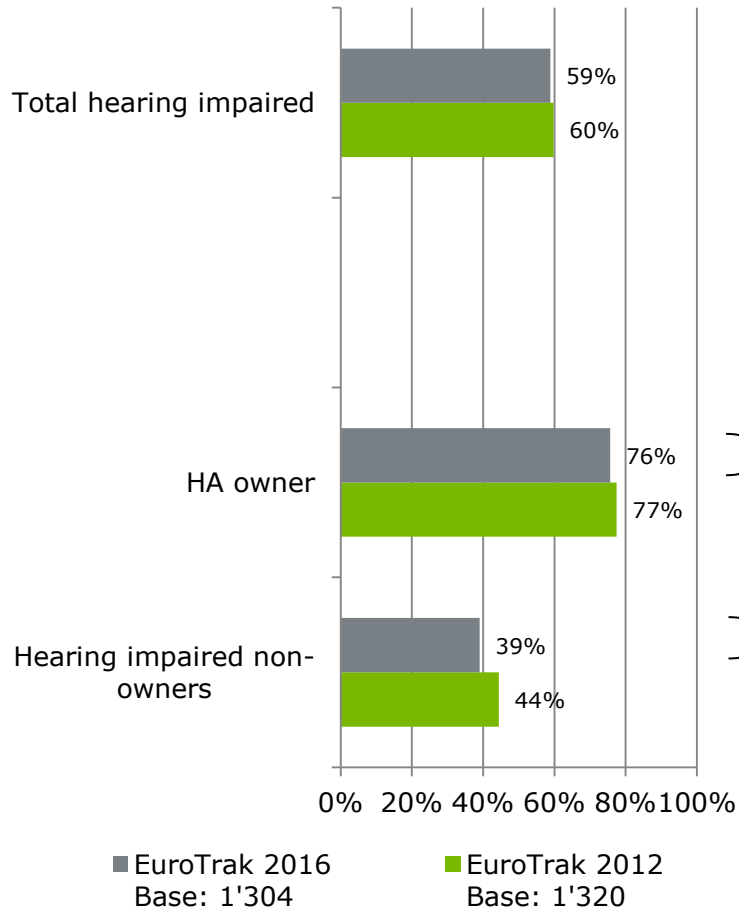
**Impaired non-owner (Base: 182)**



# The route to the hearing aid: ENT

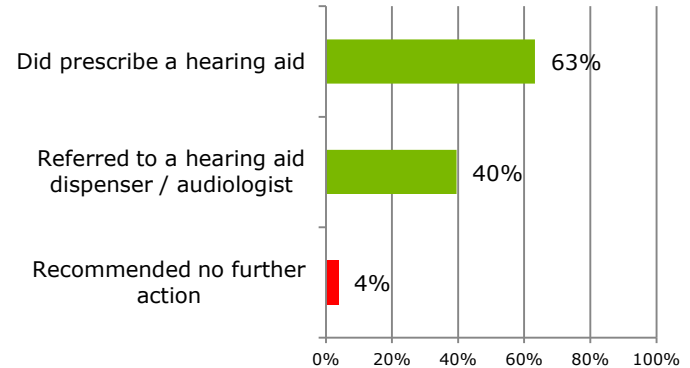
## Have you discussed your hearing problem with an ear doctor (ENT)?

**% Discussed with ENT**

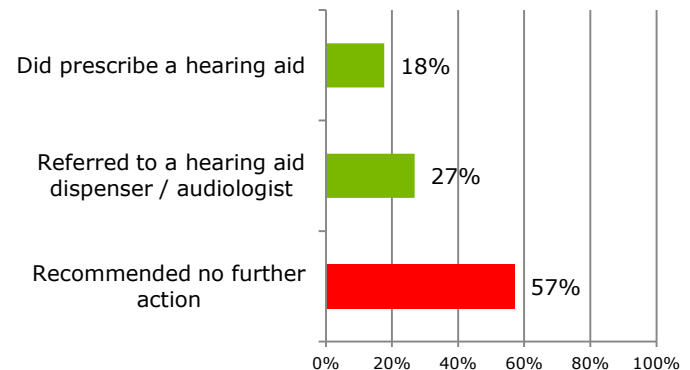


**What did he/she recommend ?**

**HA owner (Base: 515)**



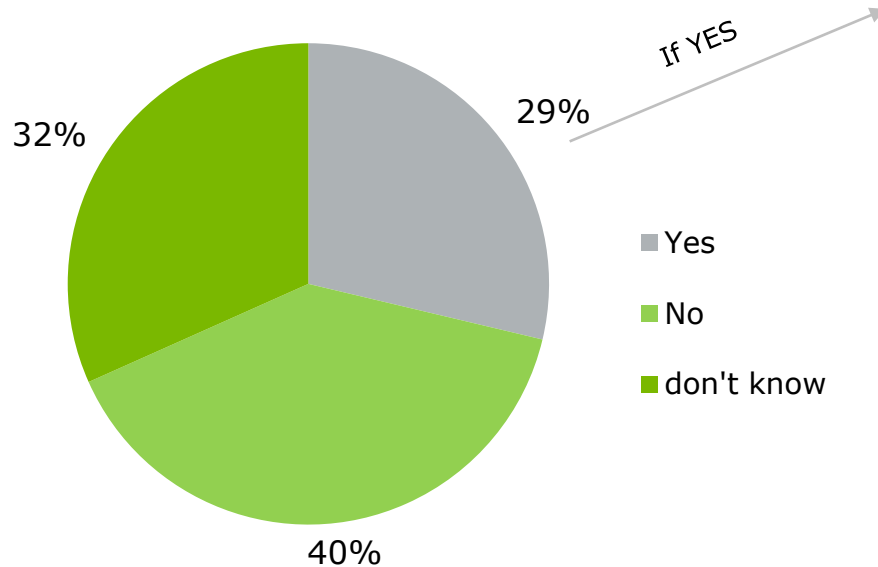
**Impaired non-owner (Base: 222)**



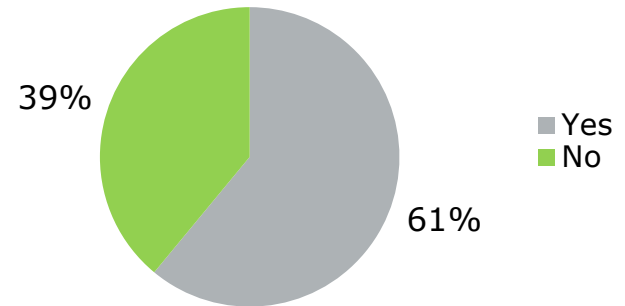
# Denmark: country specific questions

## Var der mulighed for at få høreapparatbehandling hos din ØNH-læge?

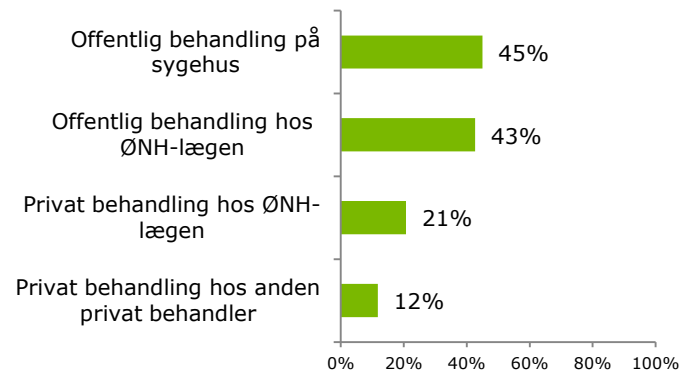
[Was there an opportunity for HA treatment from your ear doctor?]



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



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



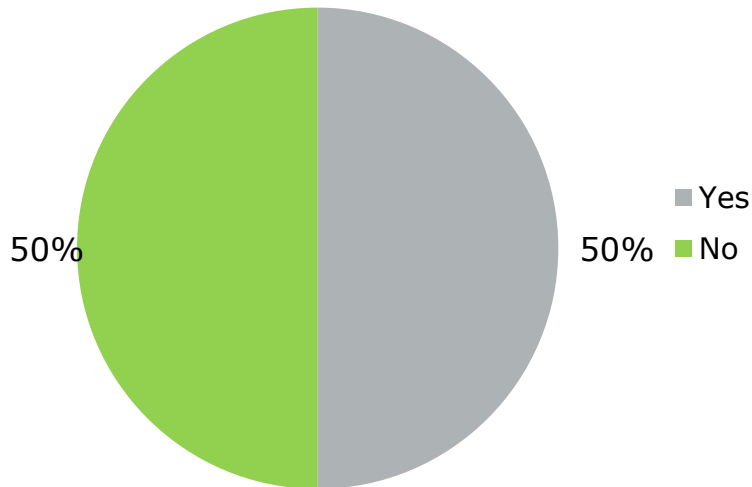
Base: N=737



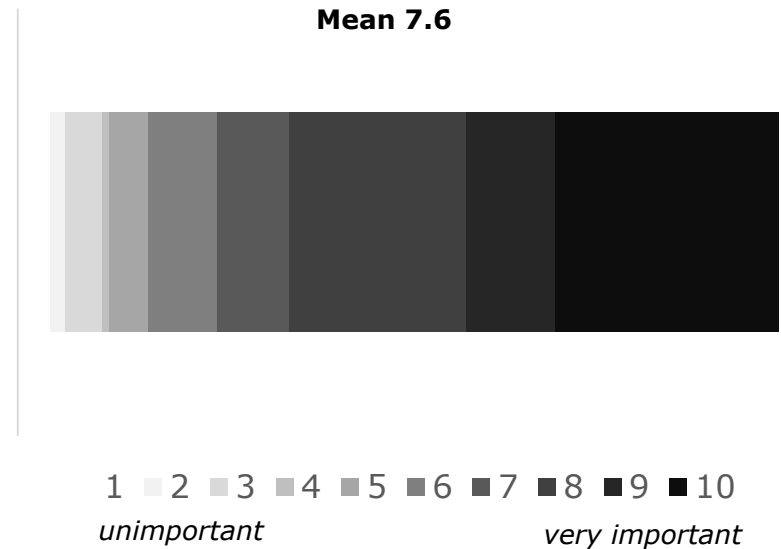
# Denmark: country specific questions

[if ENT HA treatment opportunity = Yes]

**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?]



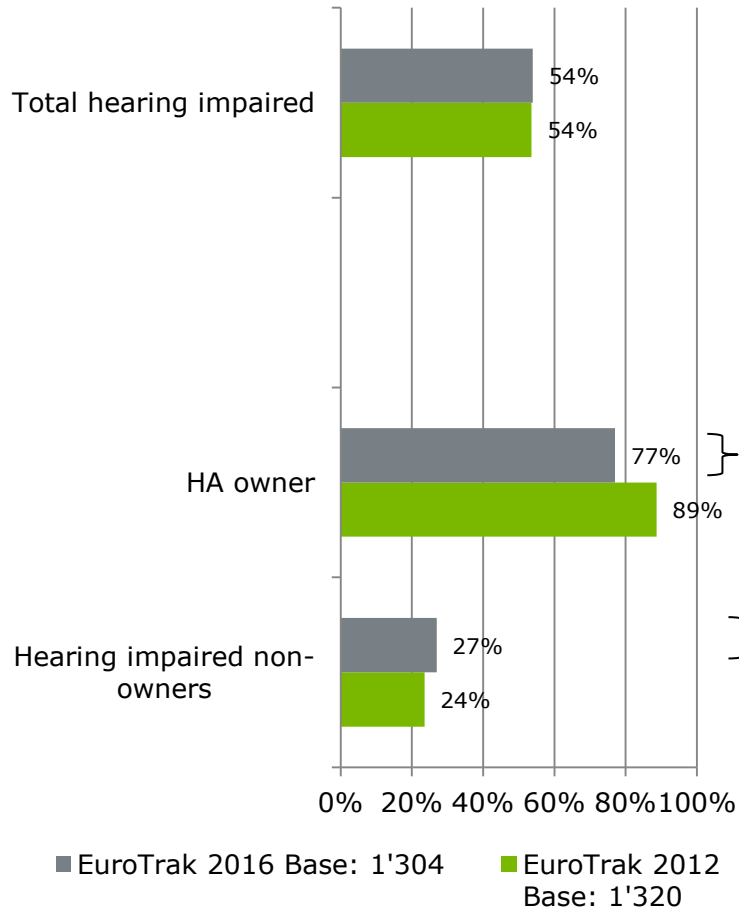
**Hvor vigtigt bedømmer du at det er at få lov til at teste høreapparater inden du træffer dit valg?** [How important is it for you to test hearing aids before making your choice?]



# The route to the hearing aid: Audiologist

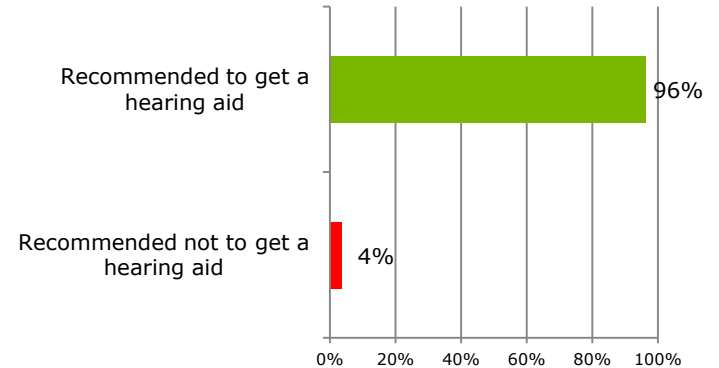
## Have you discussed your hearing problem with a Hearing Aid Dispenser/Audiologist? (public and private)

**% Discussed with Audiologist**

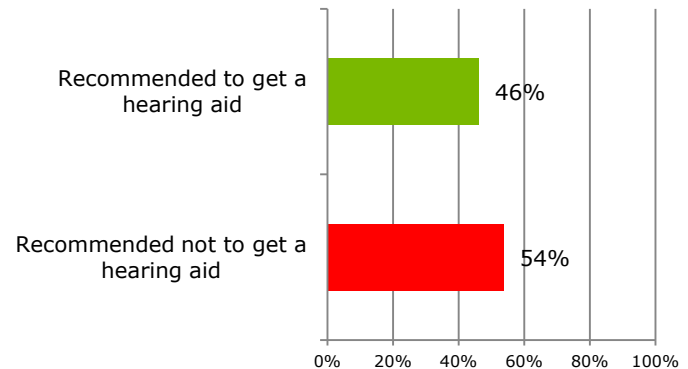


**What did he/she recommend ?**

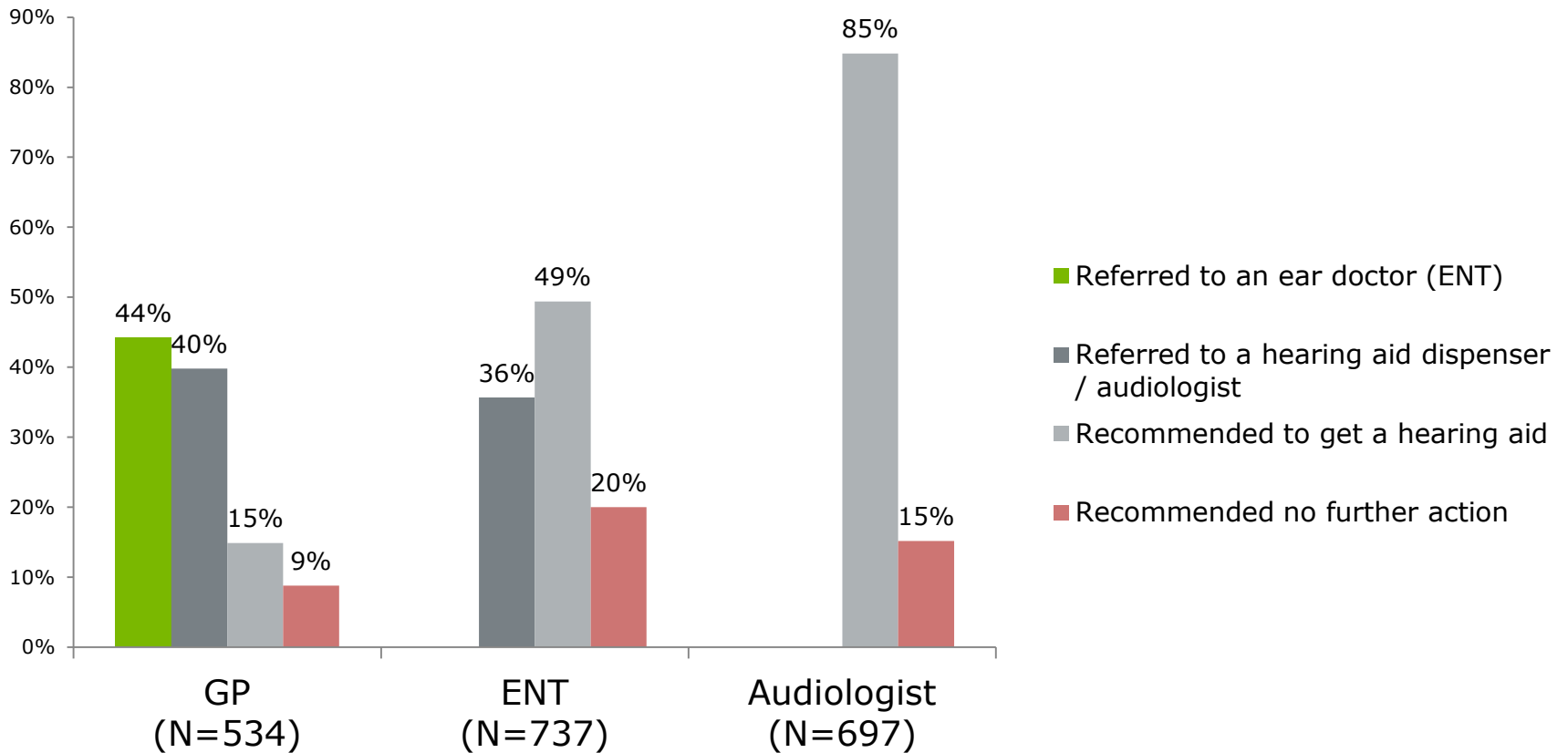
**HA owner (Base: 538)**



**Impaired non-owner (Base: 159)**



# Recommendations by profession



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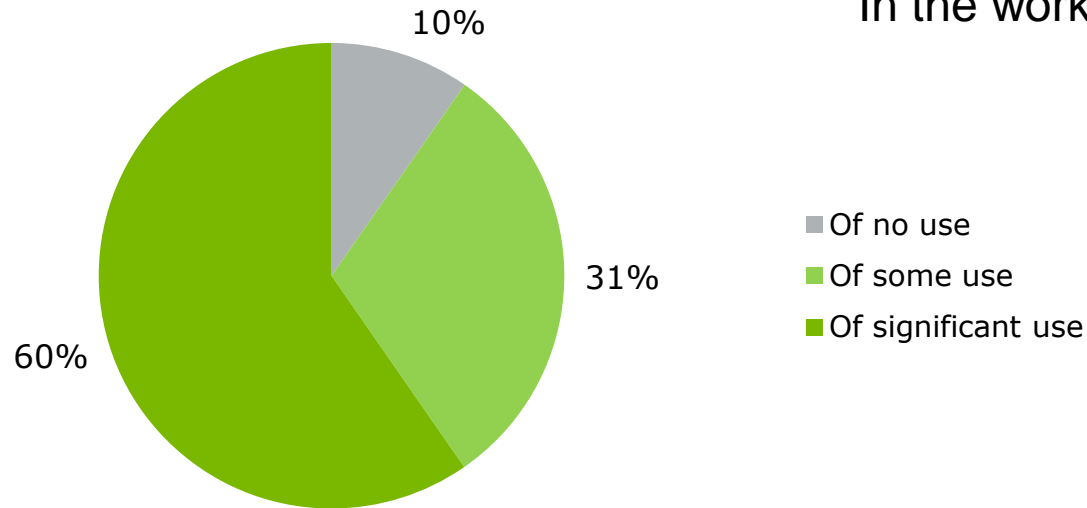
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms, sleep quality



**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?**

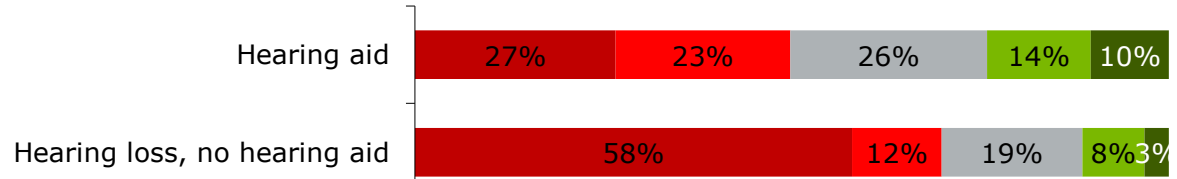
In the workplace



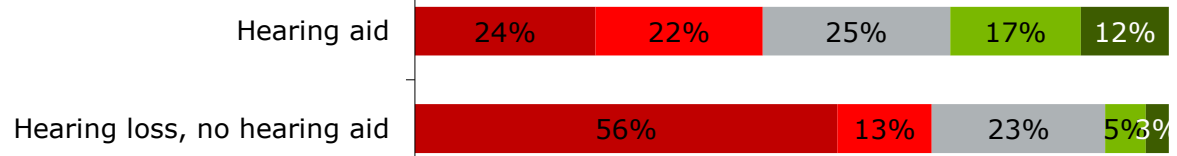
# Work competitiveness: People with hearing aids recognize that hearing aids increase the chance of hearing impaired to get promoted, to get the right job and to get more salary.

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

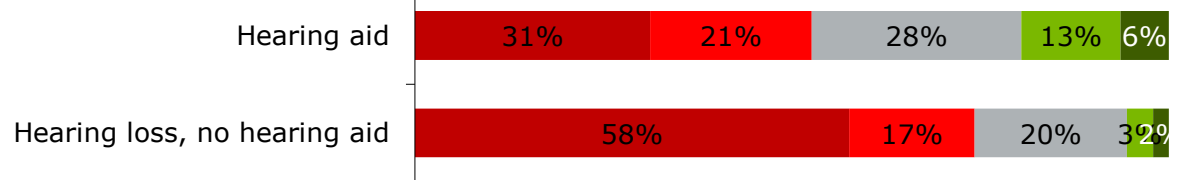
**I think that people with an untreated hearing loss tend to be less promoted in their job**



**I think that people with an untreated hearing loss tend not to get the job they deserve**



**I think that people with an untreated hearing loss tend to be under salaried**



Base: Hearing loss, no hearing aid =361/ hearing aid n=383



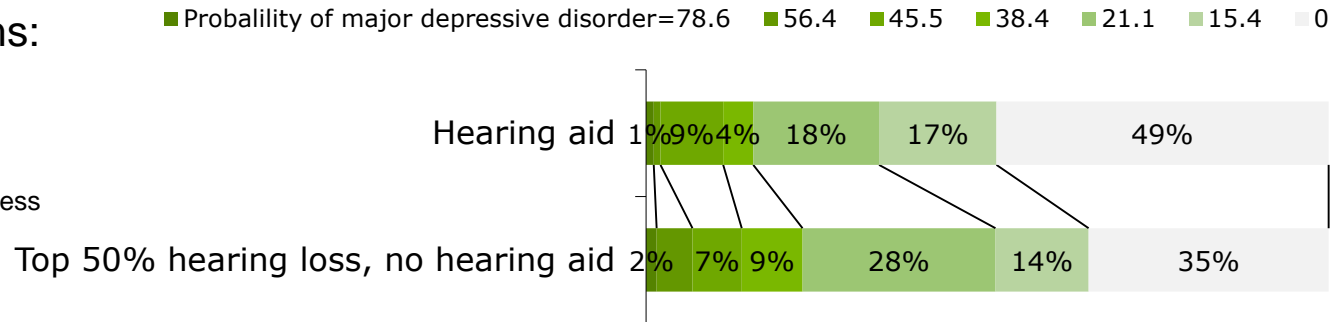
**General health problems:** Hearing aid owners have a lower risk of being of being depressive (PHQ-2 Screening) and forgetful compared to impaired non-owners with comparable hearing loss (**Top50% hearing loss group\***)

### Depression symptoms:

#### PHQ-2 Screening:

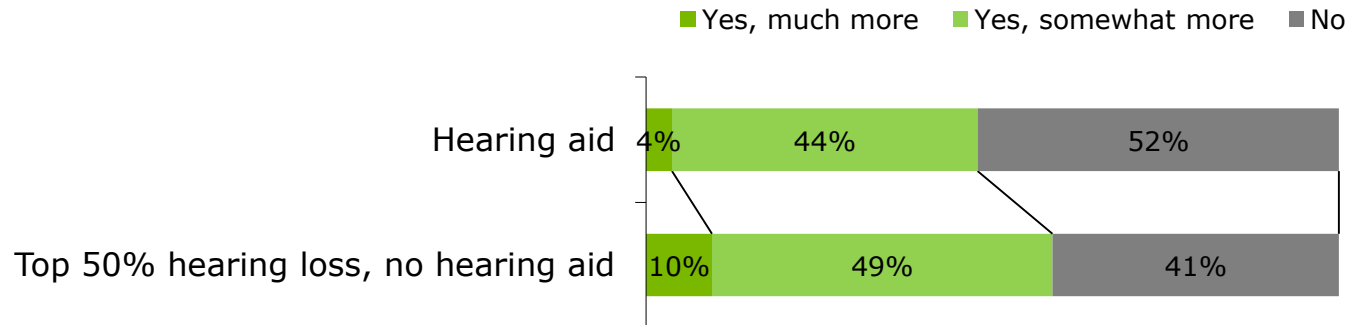
In the last 2 weeks:

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



### Dementia symptom:

Getting more forgetful in the last year?



Base: hearing aid n=530 / 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:

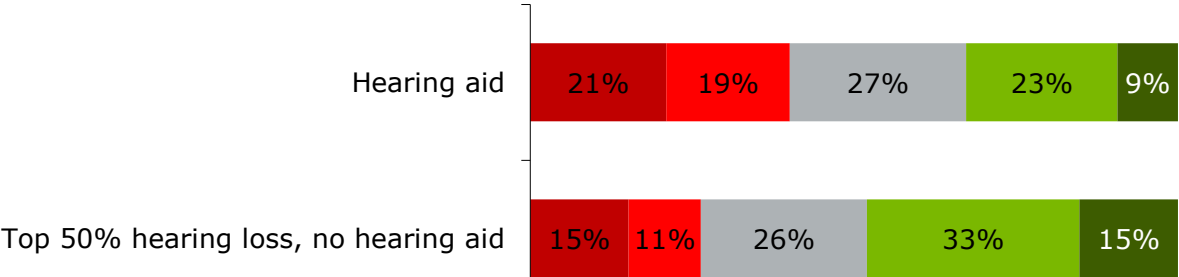
- Number of ears impaired (one or two)
  - Stated hearing loss (Mild to Profound)
  - Scores on 6 APHAB-EC – like questions (Scaled 1-5)
  - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67%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



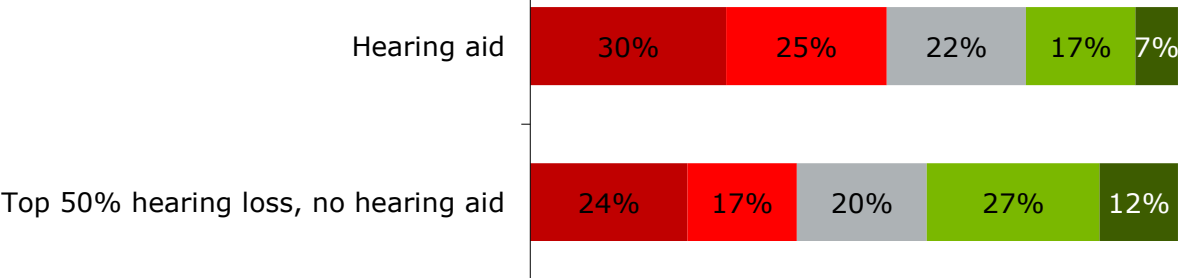
# General health problems: Compared to impaired hearing aid non-owners with significant hearing loss (Top 50% hearing loss\*), hearing aid owners feel less exhausted in the evenings

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

In the evenings I often feel physically exhausted



In the evenings I often feel mentally exhausted



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

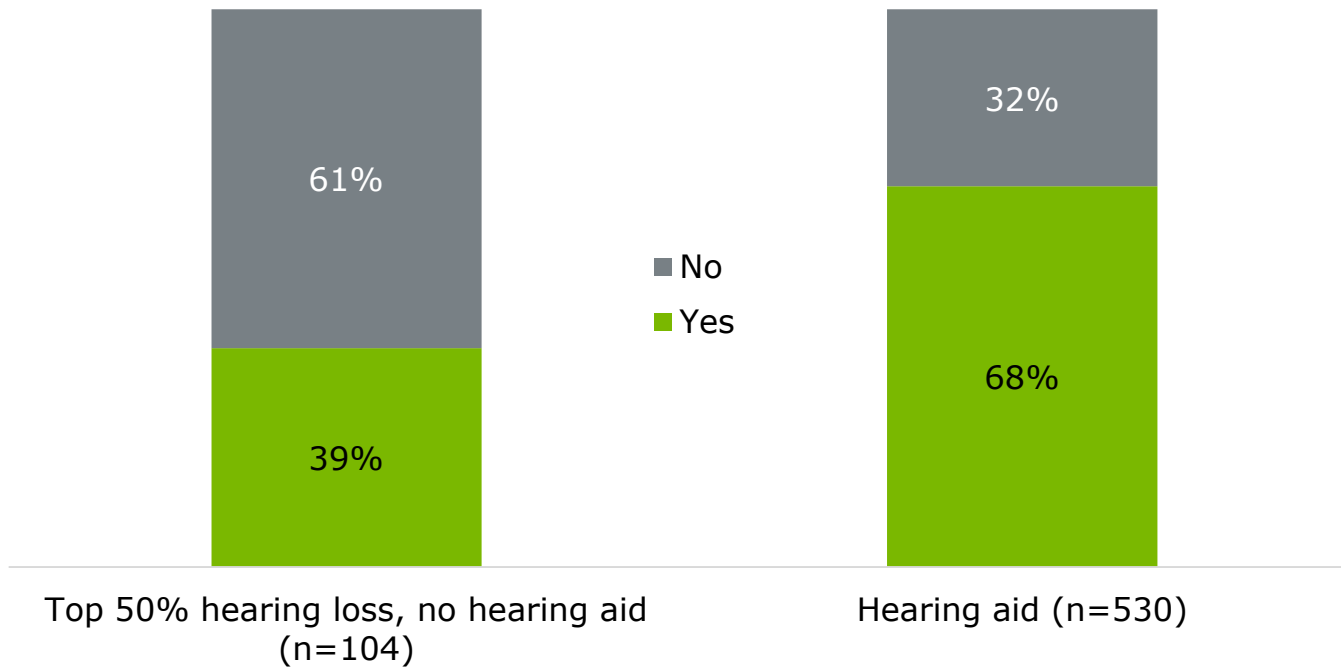
\*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:

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  - 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?



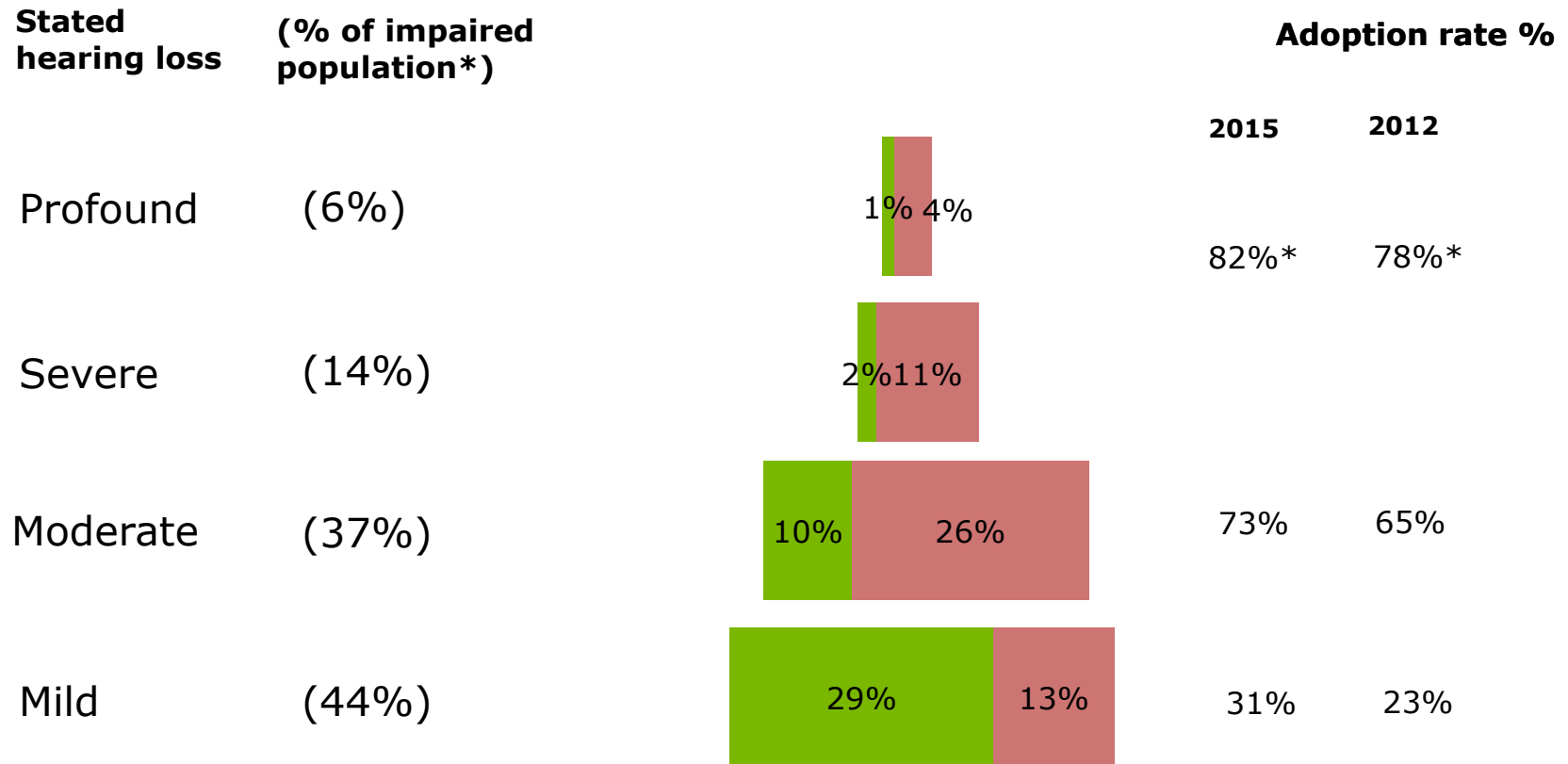
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# 3. Analysis of hearing aid owners

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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



Base: n=1'304

Sums can differ from 100% due to rounding

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

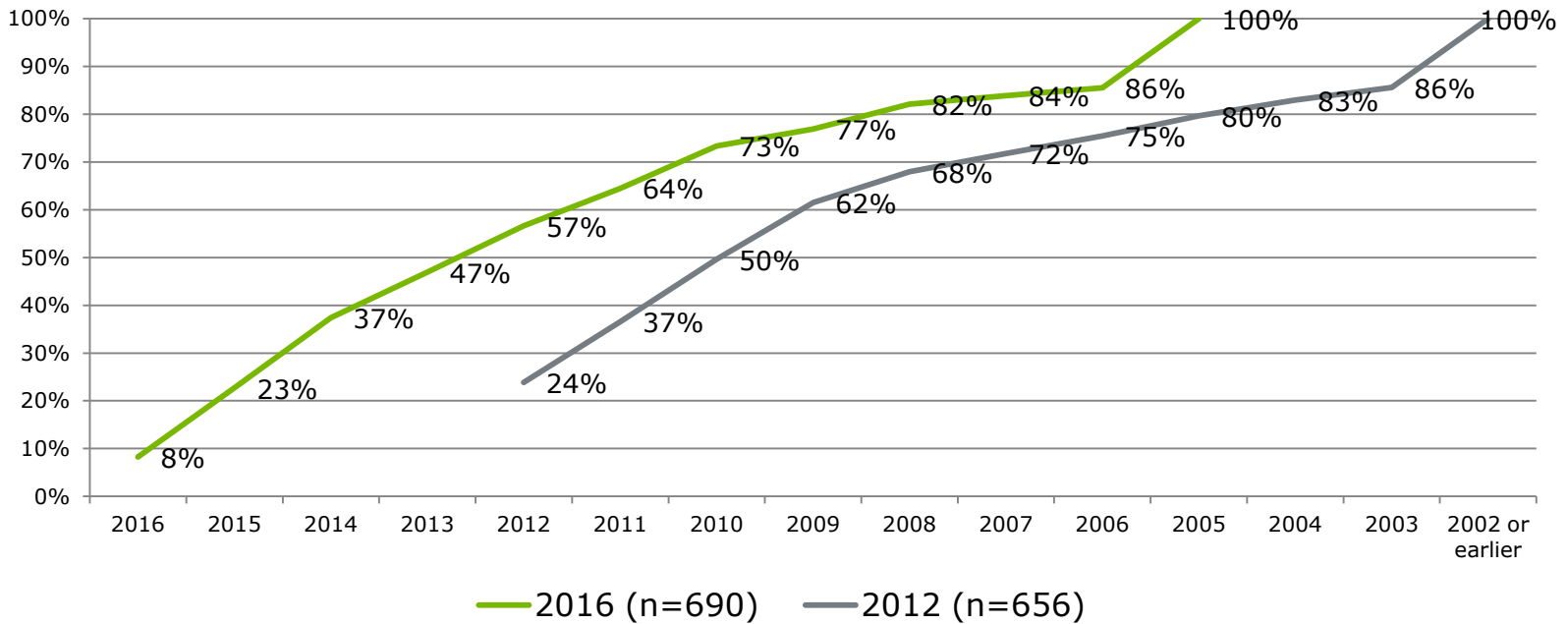
■ No hearing aid  
■ Hearing aid





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

## Year of purchase

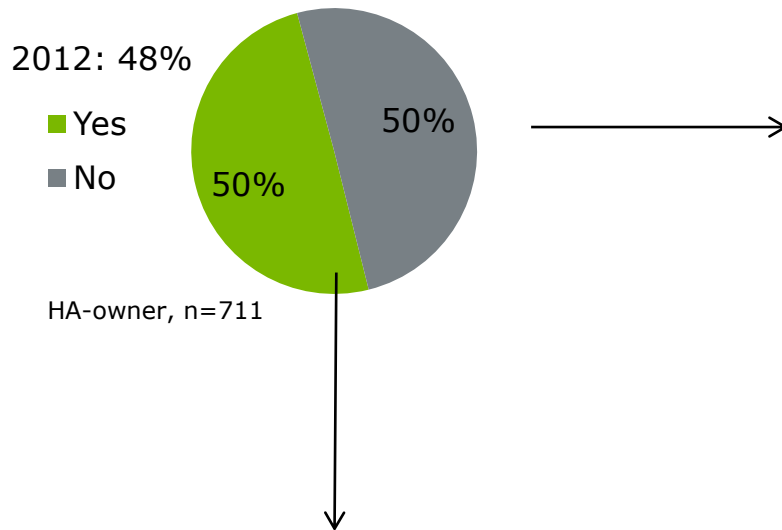


**Age of currently owned HAs (Mean):**  
**2016: 4.2 years**  
**2012: 4.1 years**

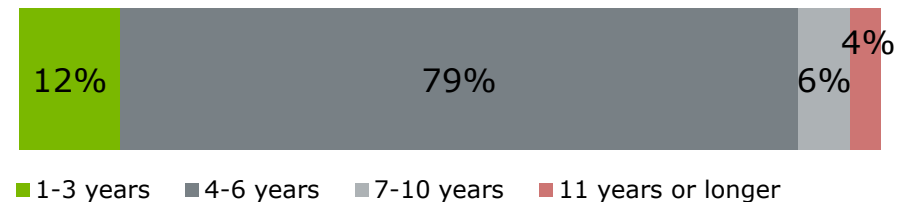


On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 4-6 years before they are being replaced.

### Current HAs = first HAs?



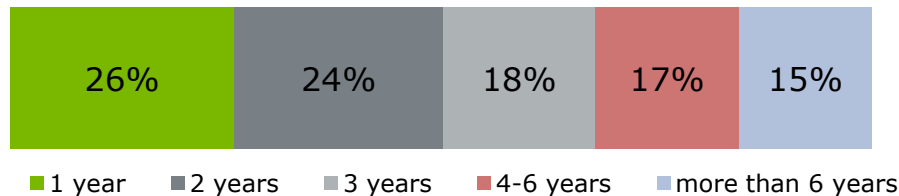
### How many years did you own your previous HAs?



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?

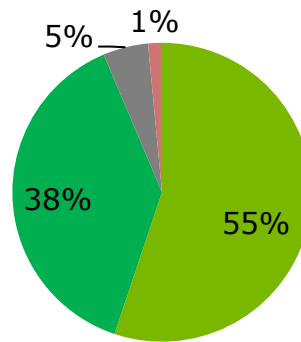


Base: n=596



Compared to 2012 less hearing aids are being paid completely by a third party.

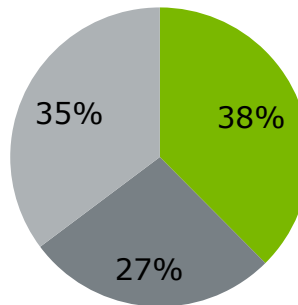
**Owners:** Was any part or all of your hearing aid(s) paid for by a third party ? (Insurance, Government, ...)



HA-owner, n=711

- 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, ...)

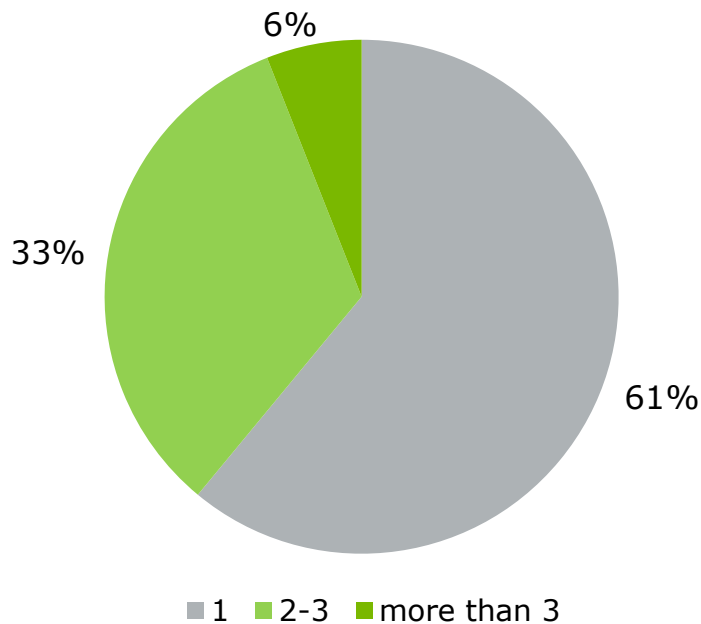


HA-non-owners, n=593

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

# Denmark: country specific questions

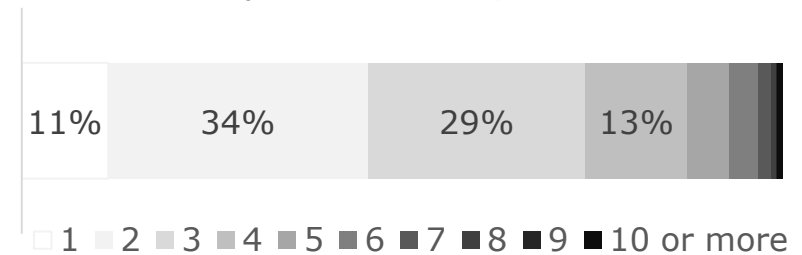
**Hvor mange forskellige HA fik du mulighed for at teste, før du valgte dit høreapparat?** *[How many different brands of hearing aids were you offered to test before you decided?]*



HA-owner, n=711

**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?]*

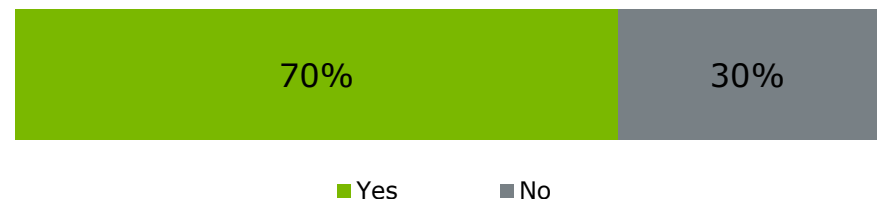


->87% had 1-4 visits

*[if HA purchased in the private sector]*

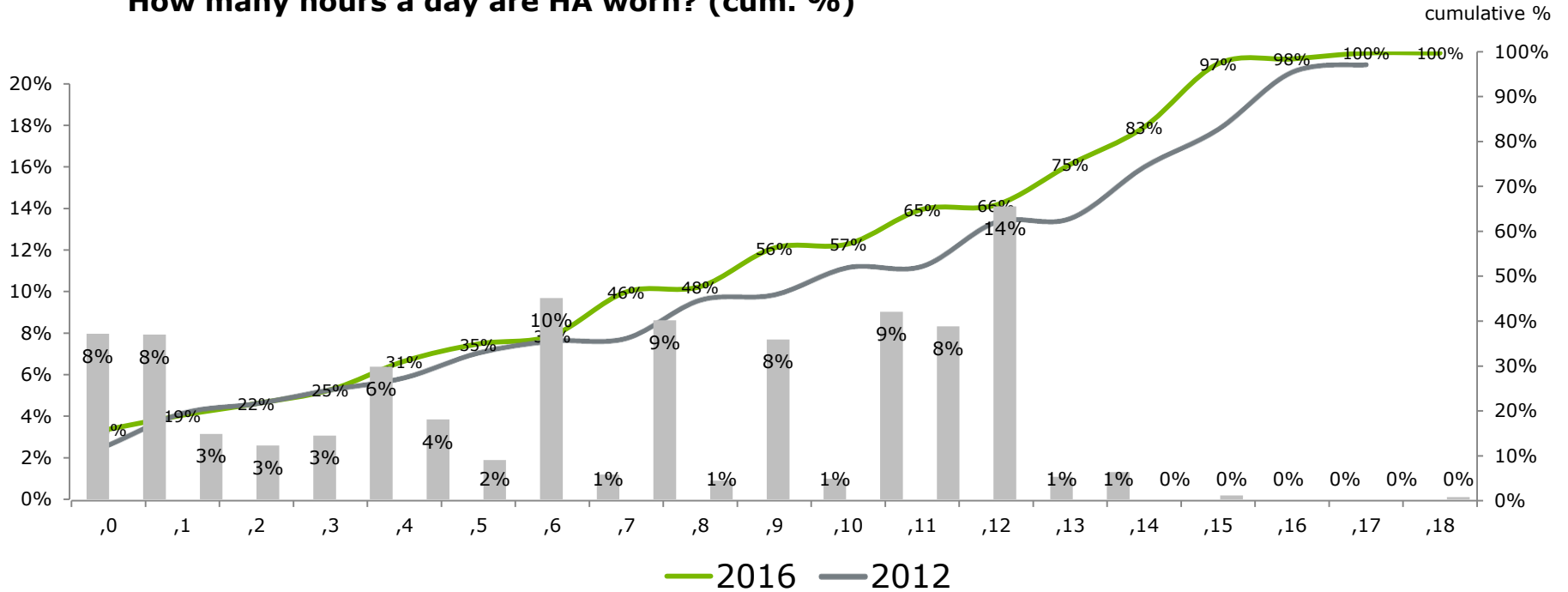
**Blev du informeret om muligheden for at få gratis høreapparater på en offentlig høreklinik?**

*[Were you informed about the possibility of getting free hearing aids at a public hearing clinic?]*



# 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**

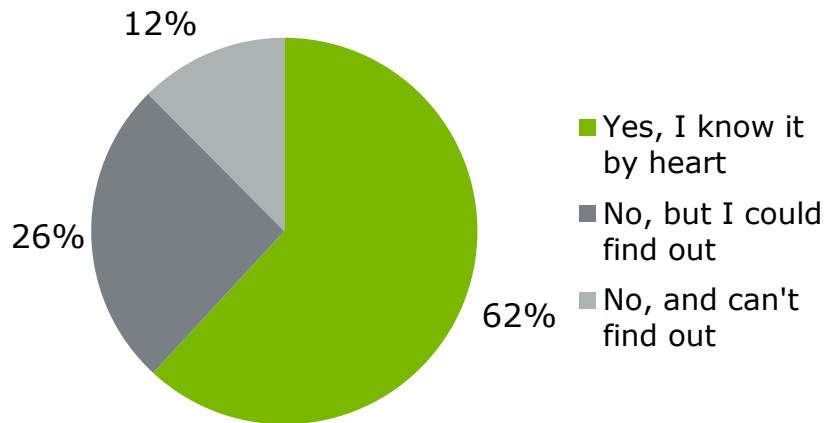
**In the drawer (0 hours):**  
 All HA owners: 8%  
 HA from offentlig høreklīnik (n=298): 12%  
 HA from privat høreapparatbutik (n=324): 3%

HA-owner:  
 2016: n=711  
 2012: n=656

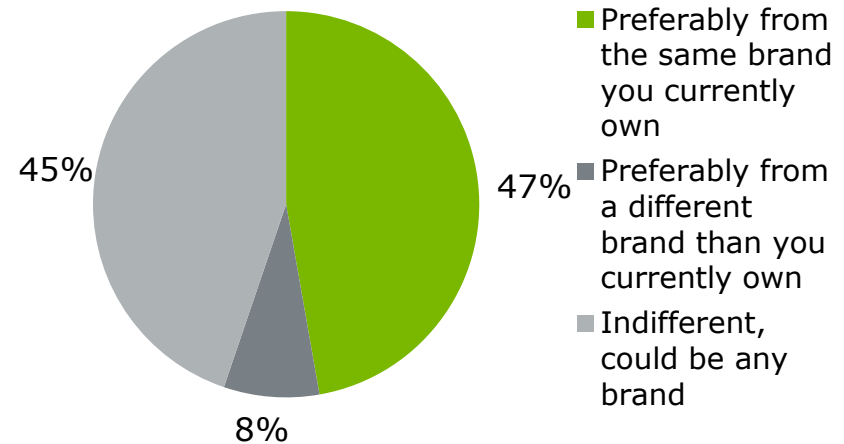


# 62% of today's hearing aid owners are aware of their hearing aid brand

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

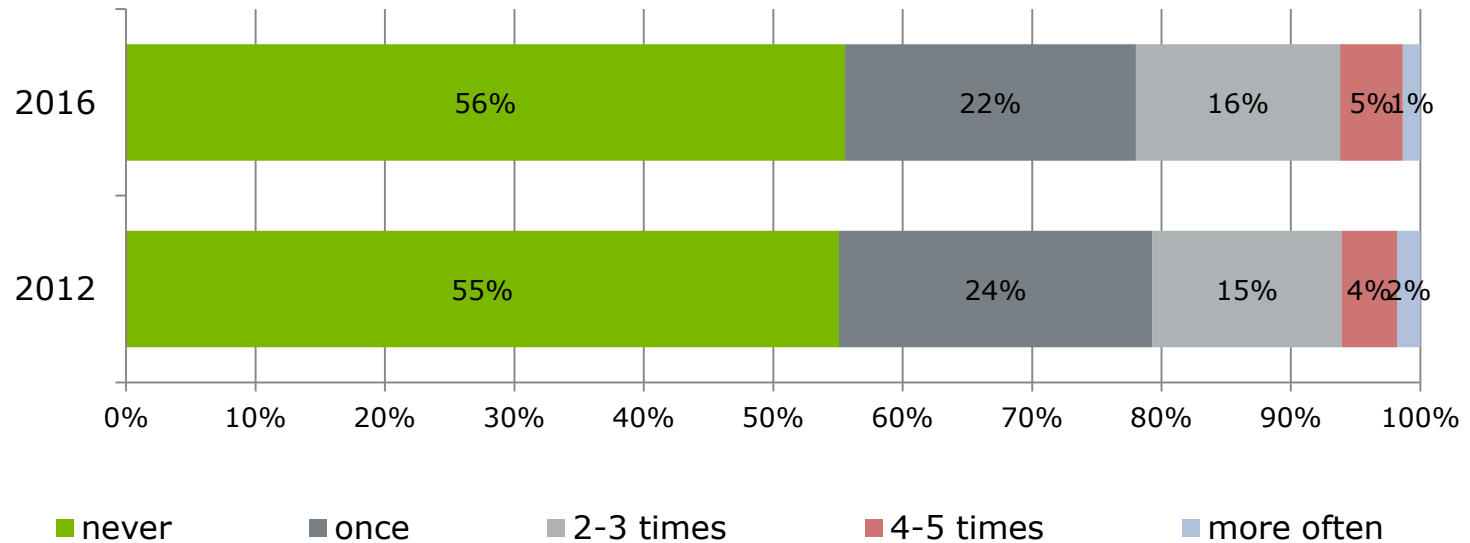


**In case you plan to obtain new hearing aid(s), what brand would you choose?**



# 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?



HA-owner:  
 2016: n=711  
 2012: n=656



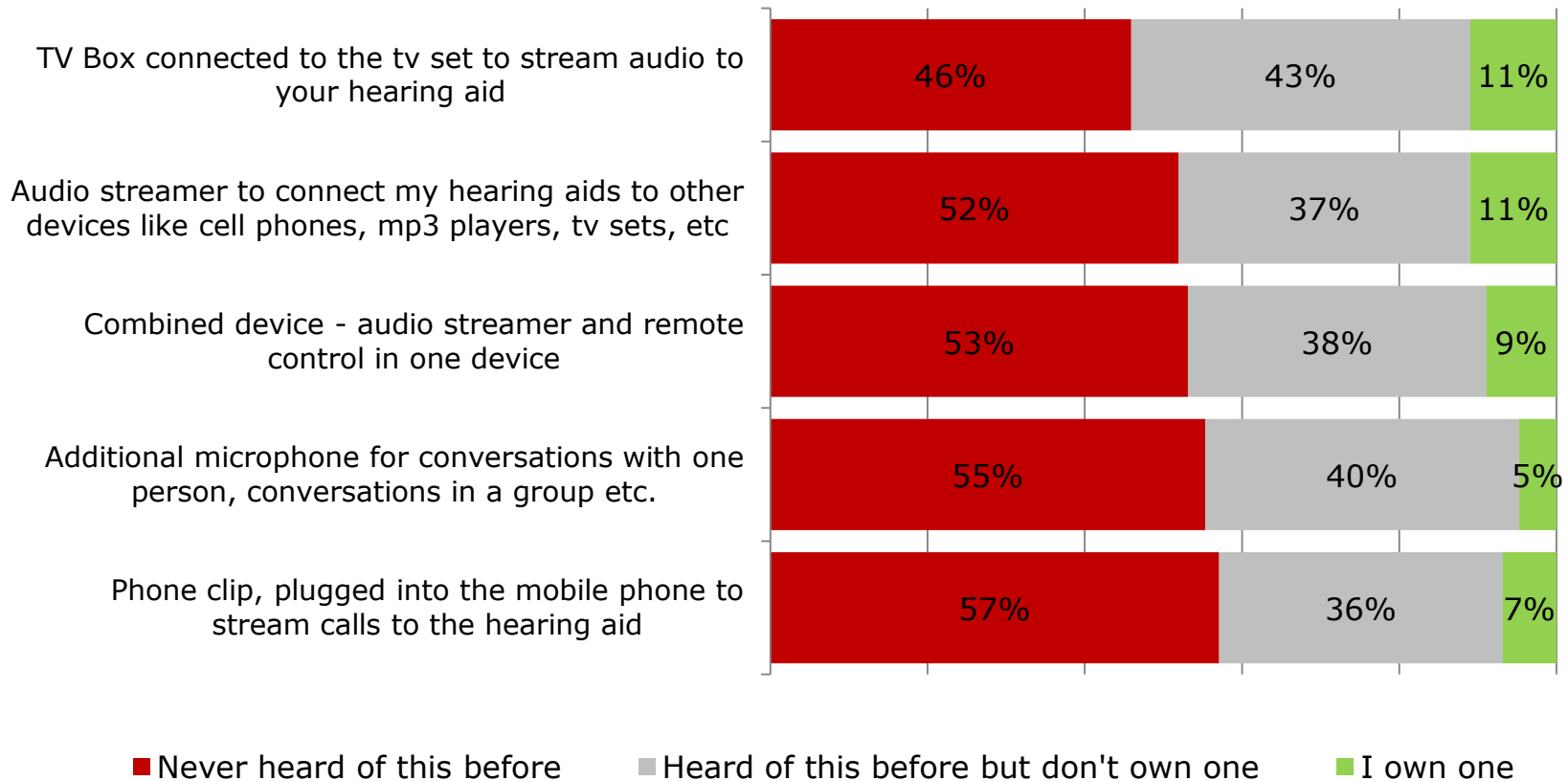
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# Awareness and usage of accessories and Telecoil



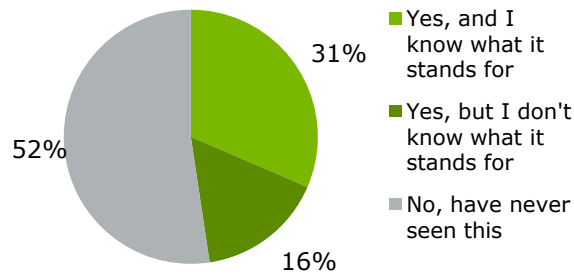
TV Box is the most often owned electronic accessory: 11 % of hearing aid owners have one – 43% have heard of it but don't own one.

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

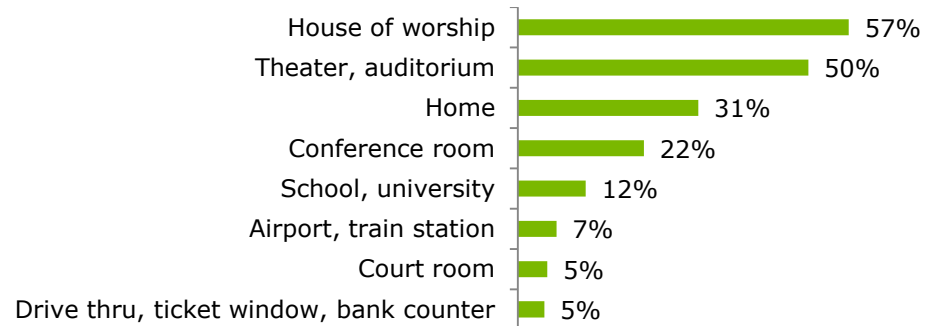


31% of hearing aid owners know what Telecoil, 23% have also used it – mainly in a house of worship, theatre or auditorium or even at home. Most of those who use it are satisfied.

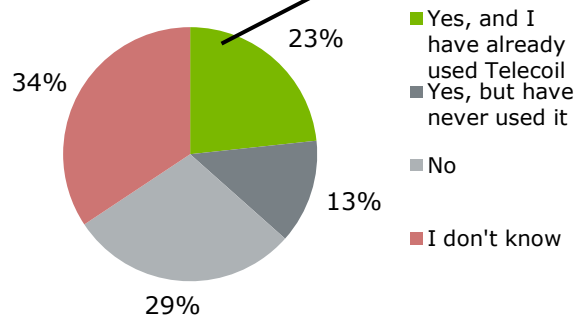
### Have you seen this logo before?



### On what type of venues have you used hearing aids in a hearing loop (Telecoil)?

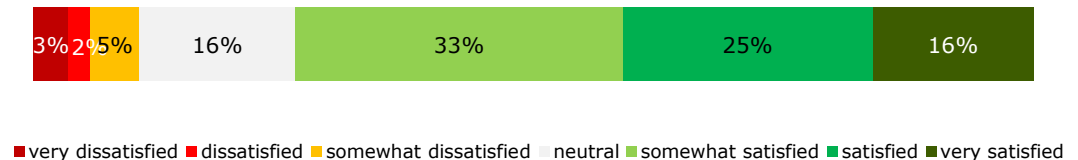


### Are your hearing aids equipped with Telecoil?



HA-owner, n=711

### How satisfied are you with the use of Telecoil overall?



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

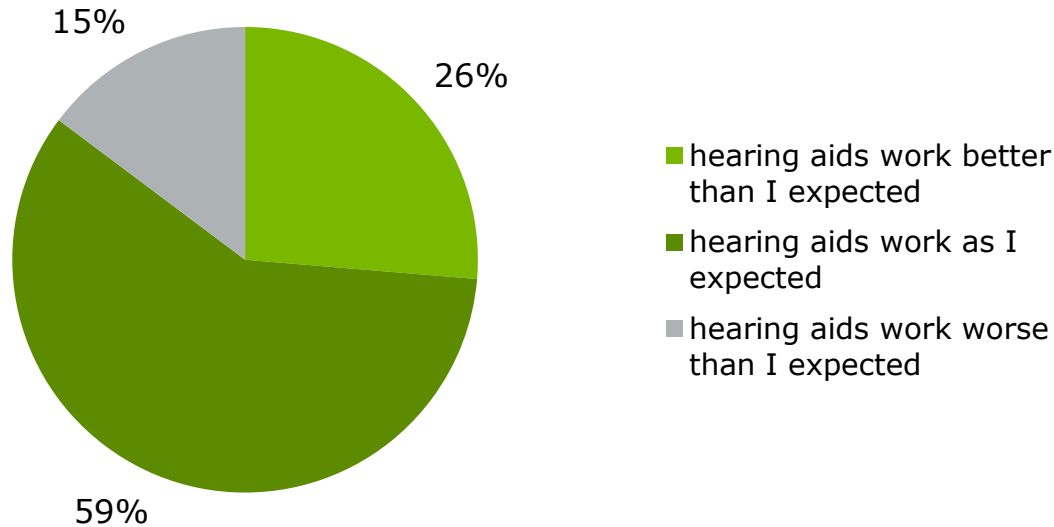


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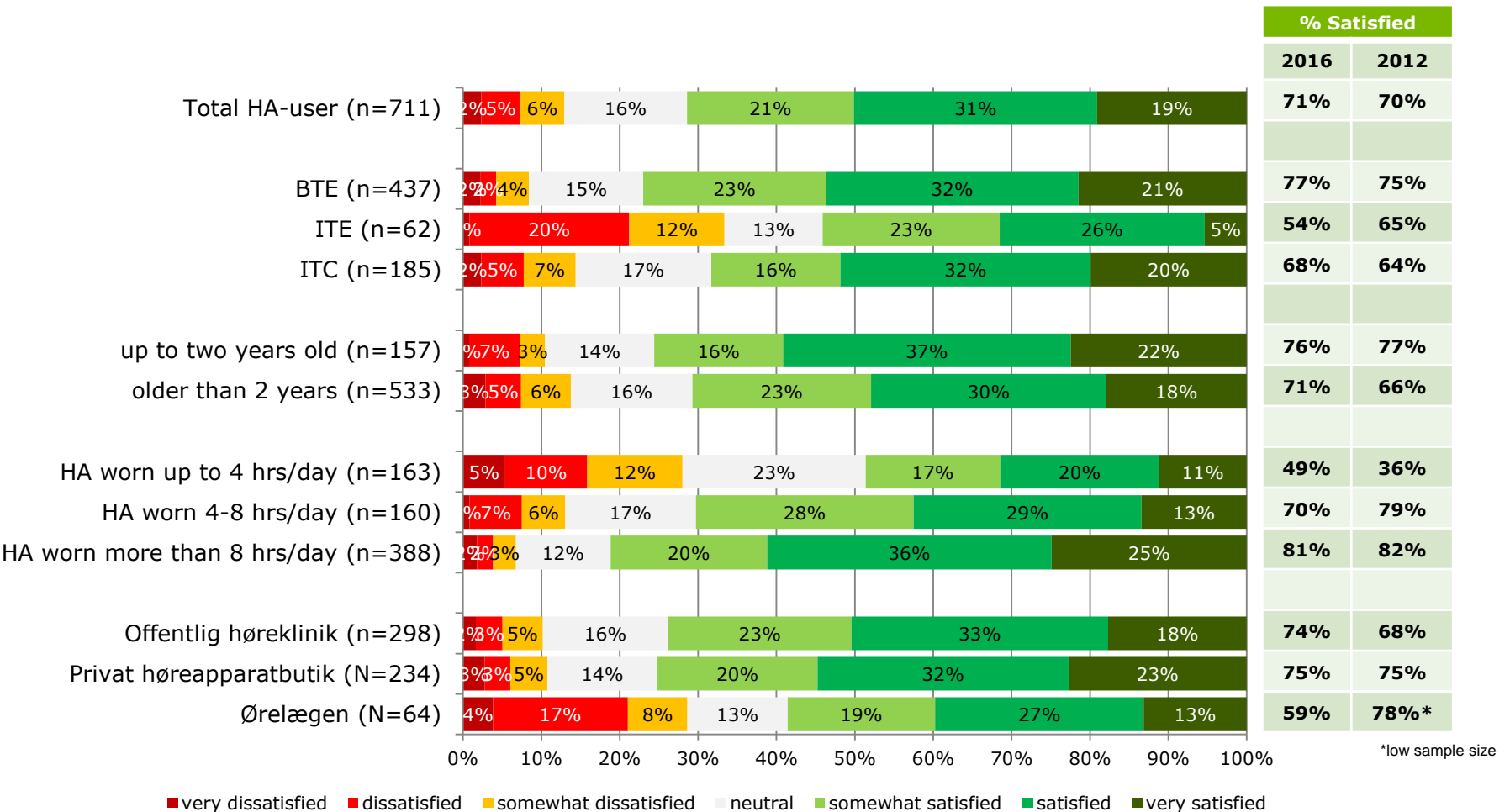
# Satisfaction with hearing aids and drivers

# 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?**



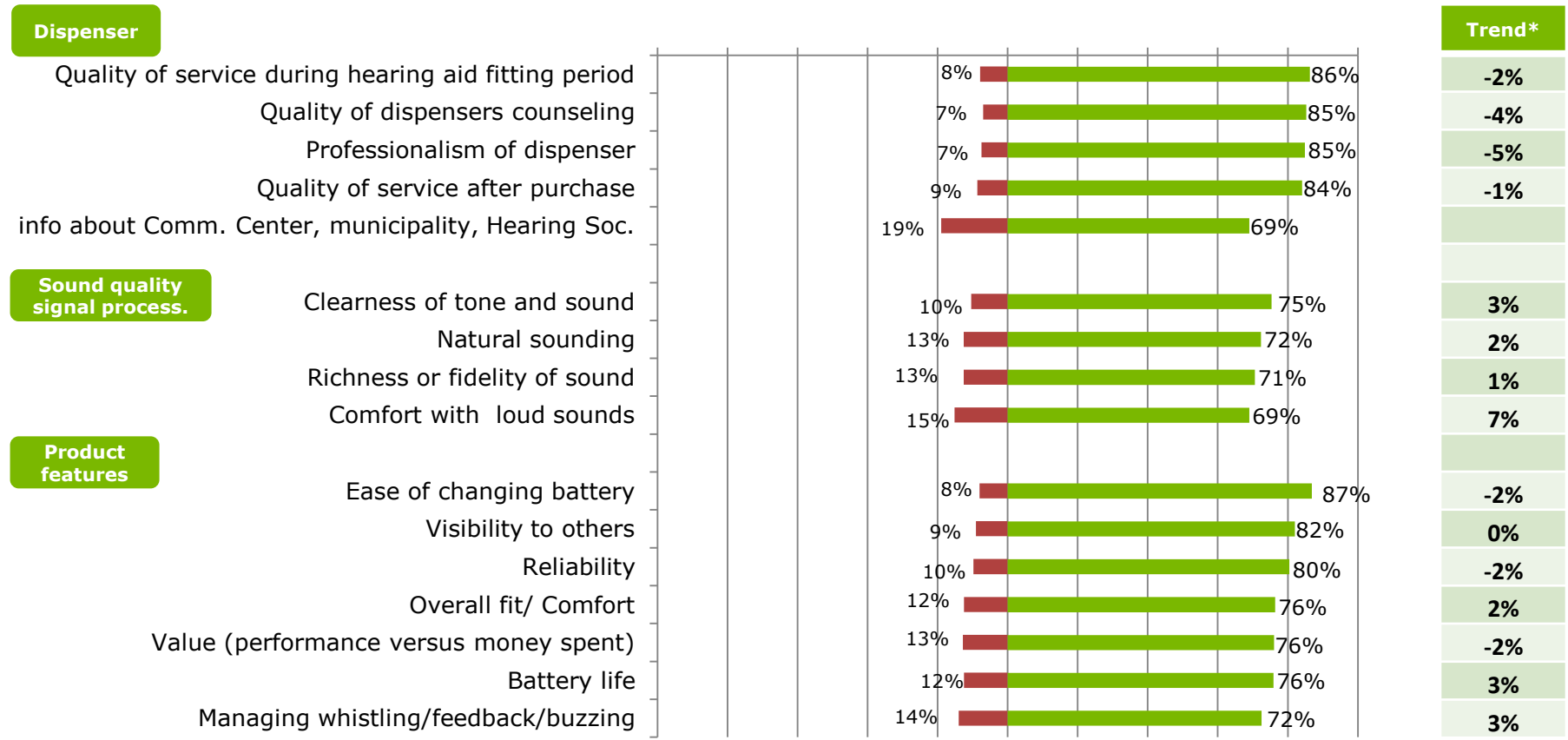
# Overall satisfaction with HA is stable around 70%



# Overall Satisfaction with HA: Country comparison

	France	Switzerland	UK	Denmark	Norway	Italy	Japan
Overall satisfaction 2012	80%	84%	72%	70%	72%	70%	36%
Overall satisfaction 2015/16	84%	81%	70%	71%		79%	39%

# Satisfaction with current hearing aids



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

\* % of satisfied HA owners compared to EuroTrak 2012

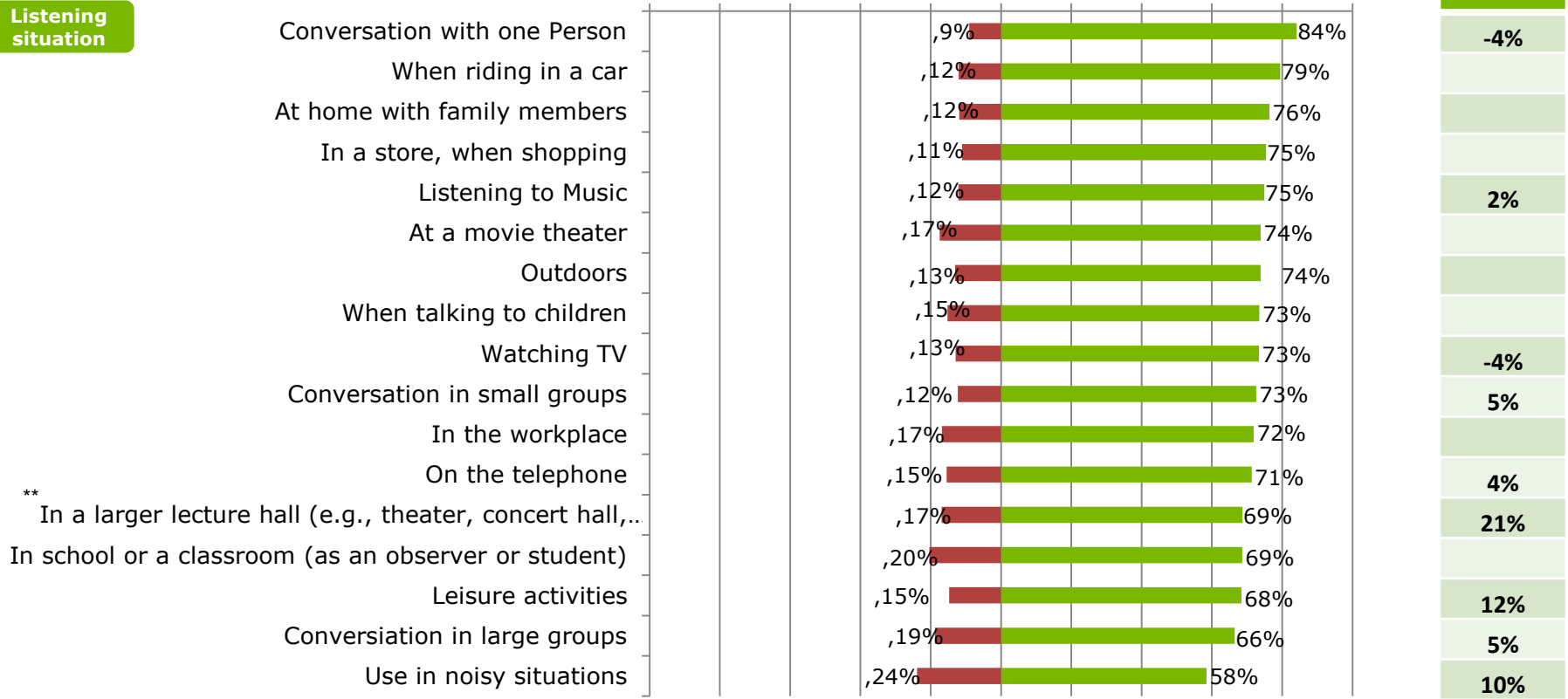
■ dissatisfied ■ satisfied

HA-owner, n=711



# Satisfaction with current hearing aids

**Listening situation**



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





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

**dissatisfied** **satisfied** HA-owner, n=711



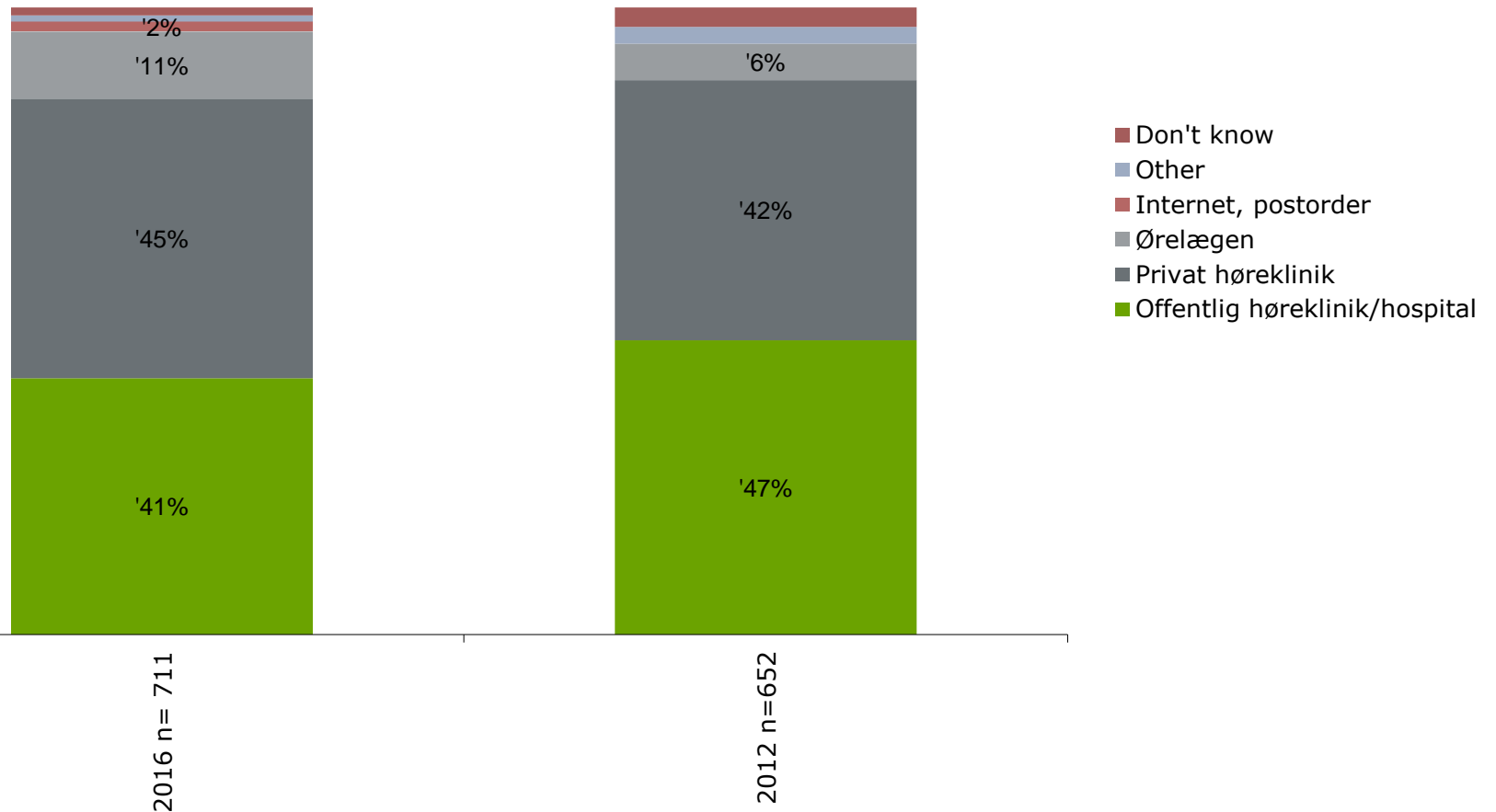


# Overall satisfaction with hearing aids

	Offentlig høreklifik	Privat høreapparatbutik (ikke ØNH pulje pt.)
Mild-moderate hearing loss	 <b>76%</b> (ET12:70%) (n=200)	 <b>82%</b> (ET12:76%) (n=248)
Severe-profound hearing loss	 <b>67%</b> (ET12:60%) (n=89)	 <b>52%</b> (ET12:76%) (n=66)

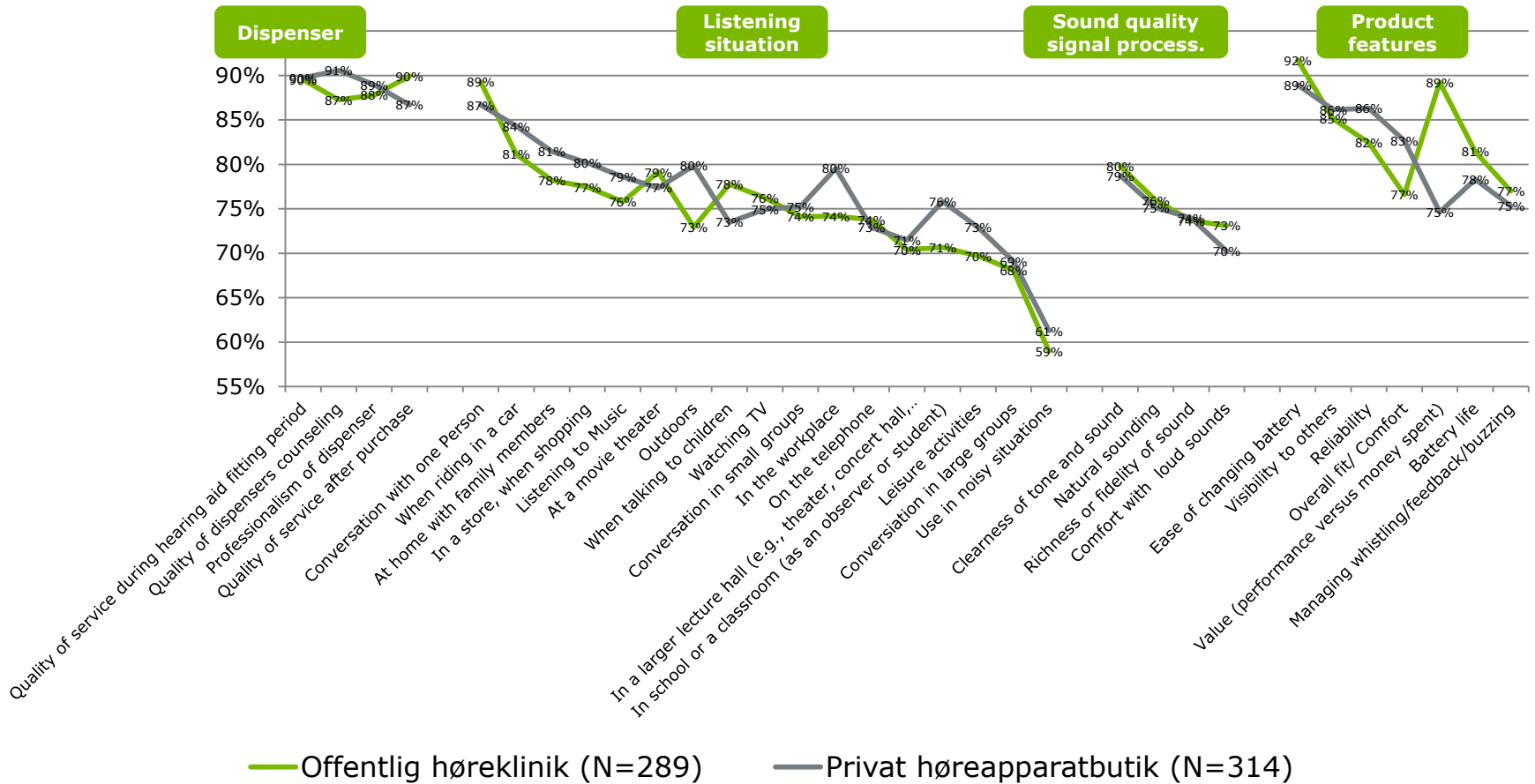
# Channel

Where was your most current hearing aid purchased?



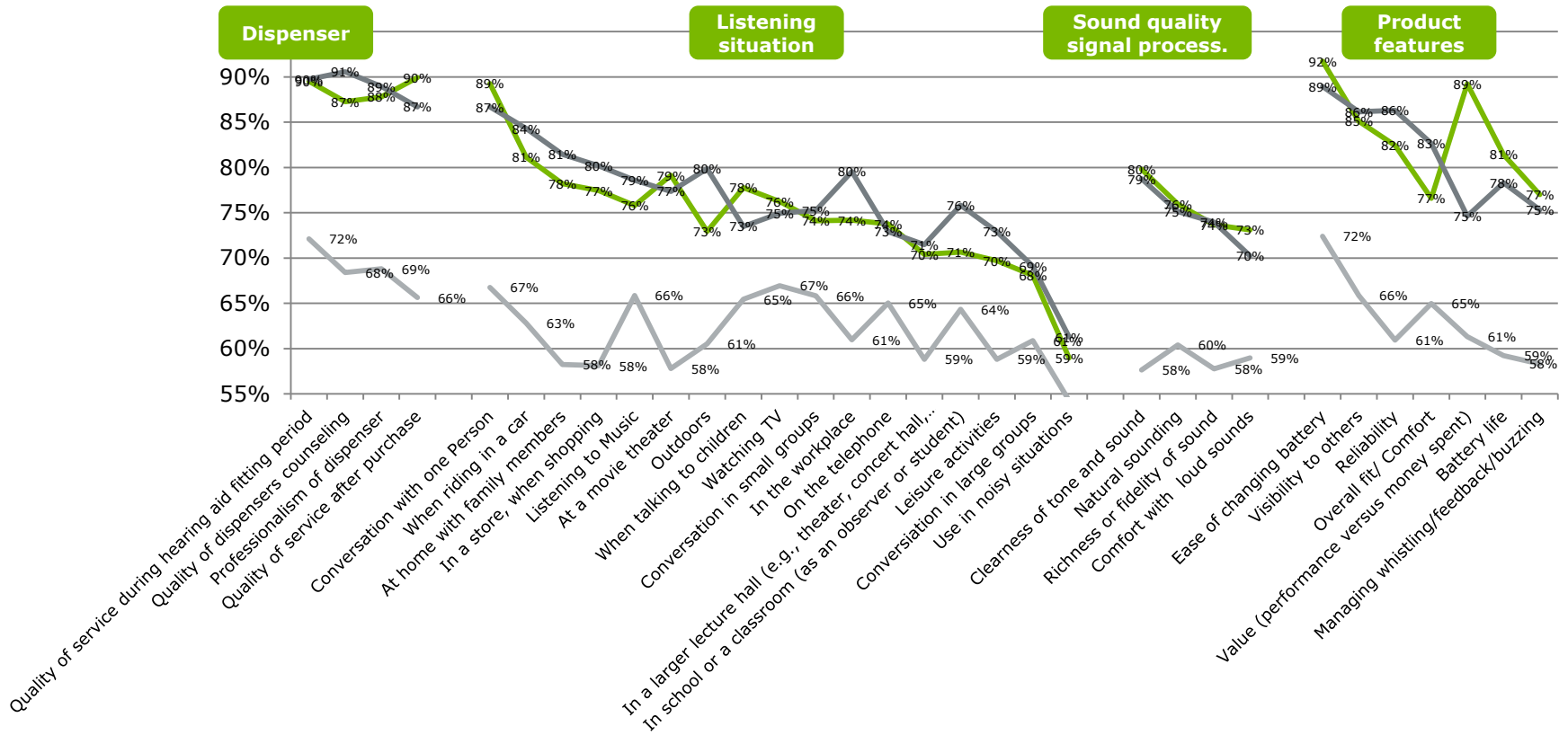
# Satisfaction with current HA: privat høreapparatbutik vs. offentlig høreklinik

% satisfied



# Satisfaction with current HA: privat høreapparatbutik vs. offentlig høreklínik vs ørelægen

% satisfied

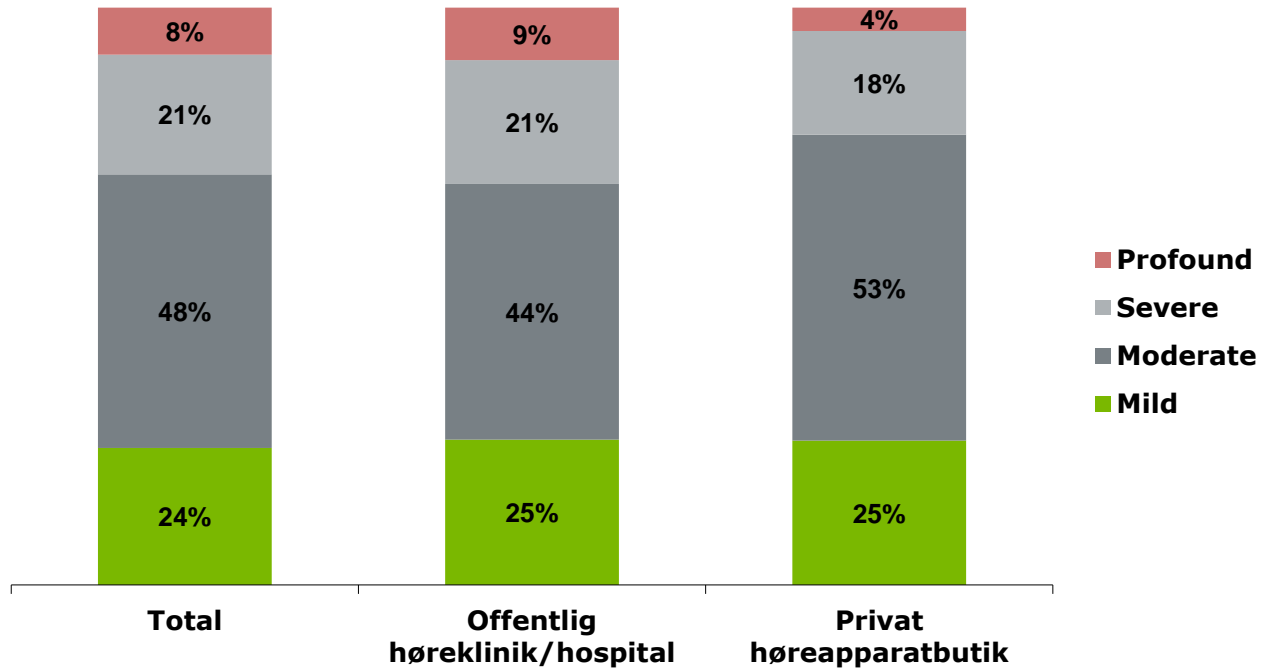


— Offentlig høreklínik (N=289) — Privat høreapparatbutik (N=314) — Ørelægen (N=62)



# Additional Information

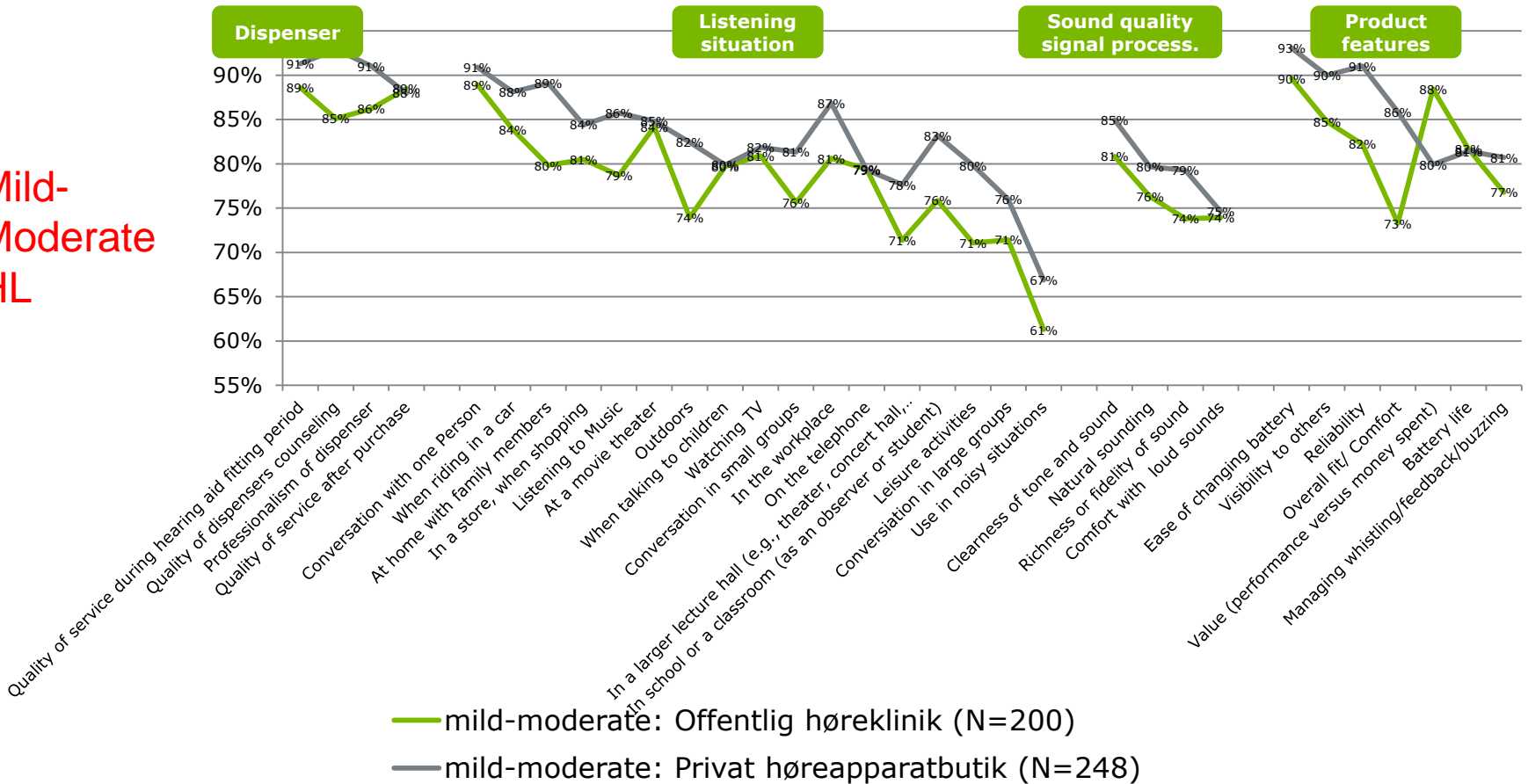
## Degree of HL vs. public/private



# Satisfaction with current HA: privat høreapparatbutik vs. offentlig høreklunik

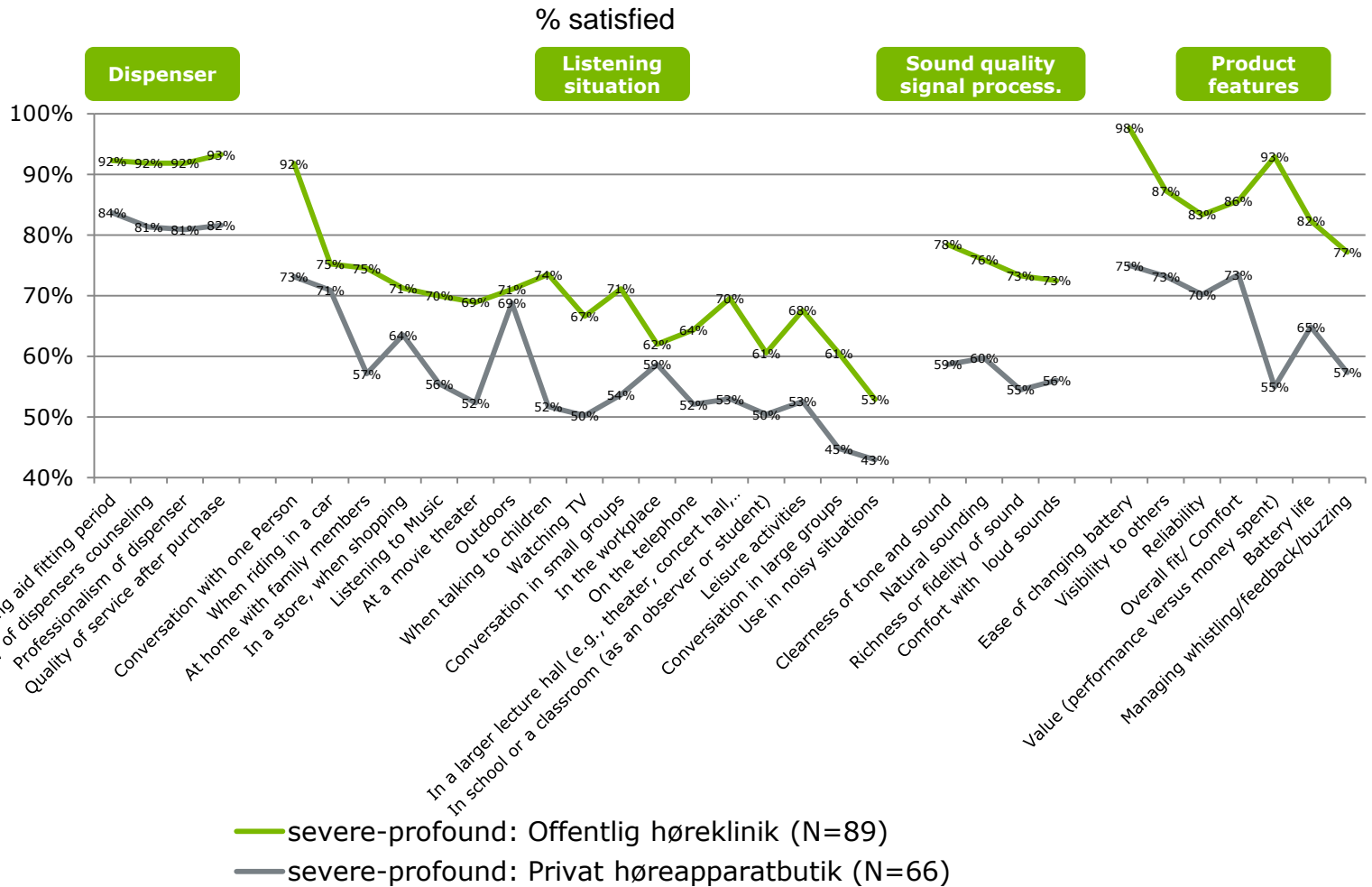
Mild-  
Moderate  
HL

% satisfied

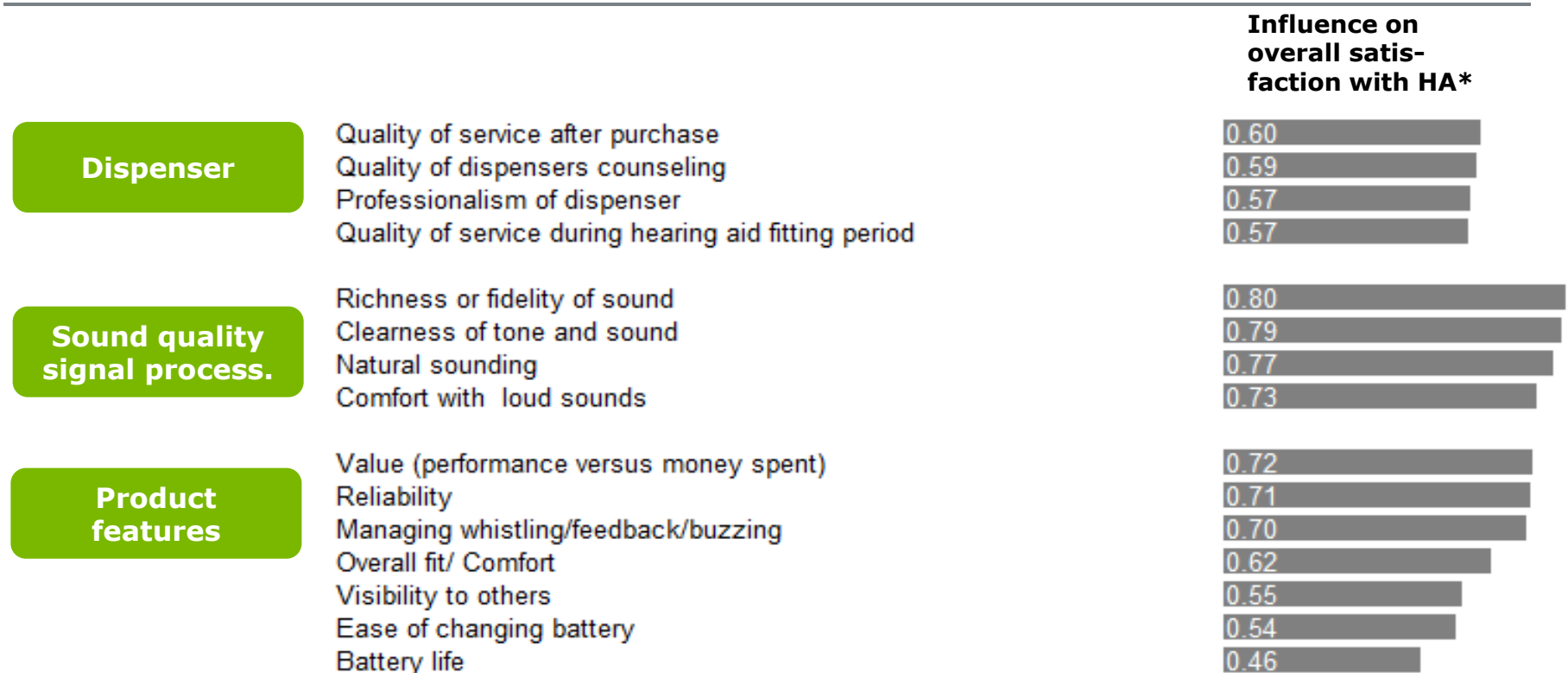


# Satisfaction with current HA: privat høreapparatbutik vs. offentlig høreklinik

Severe-  
Profound  
HL



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

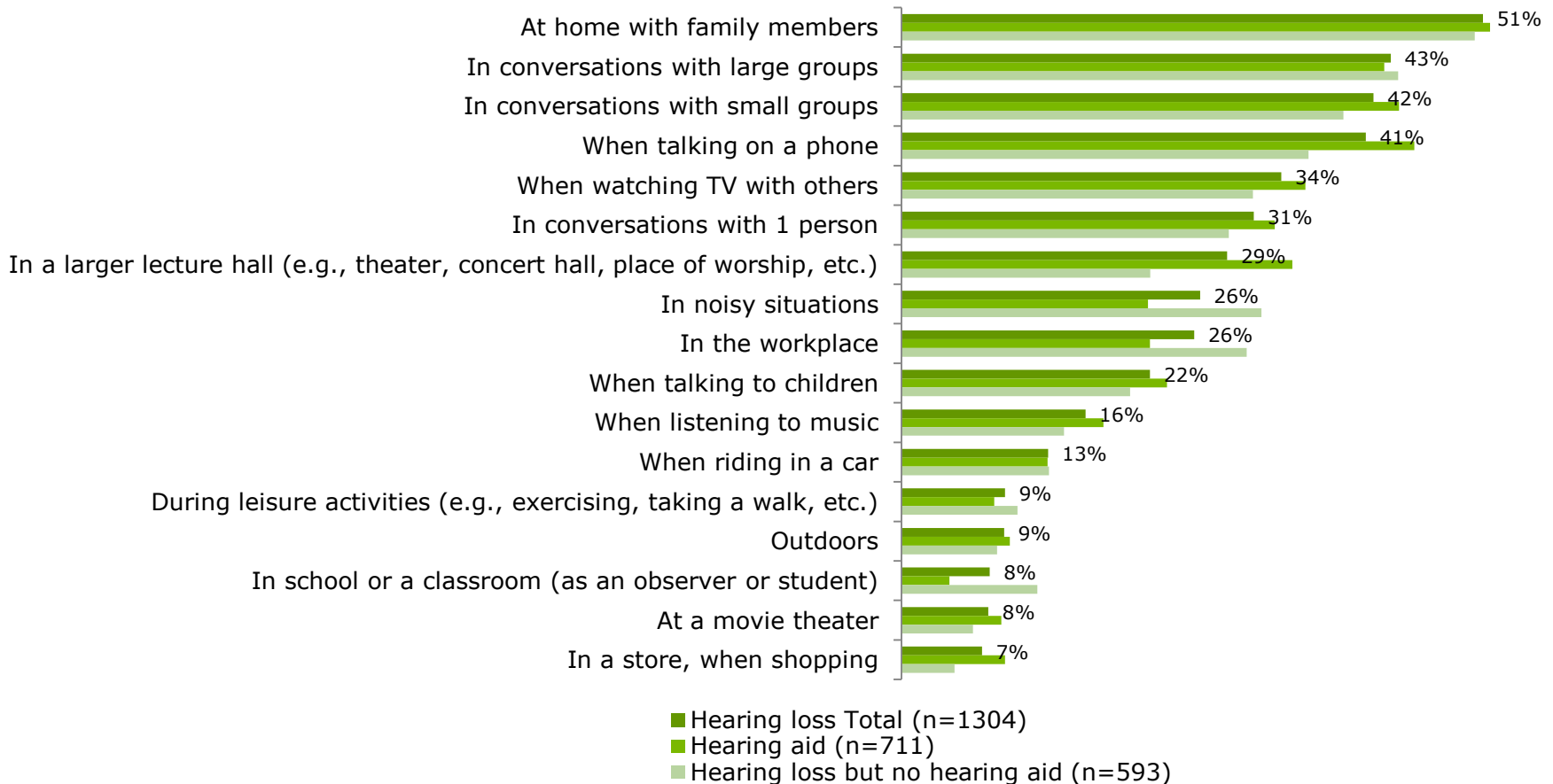


\*The influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction ; 1 means a maximal relationship. Read: richness or fidelity of sound is the most important criterion for satisfaction. Page 64



# Important listening situations

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

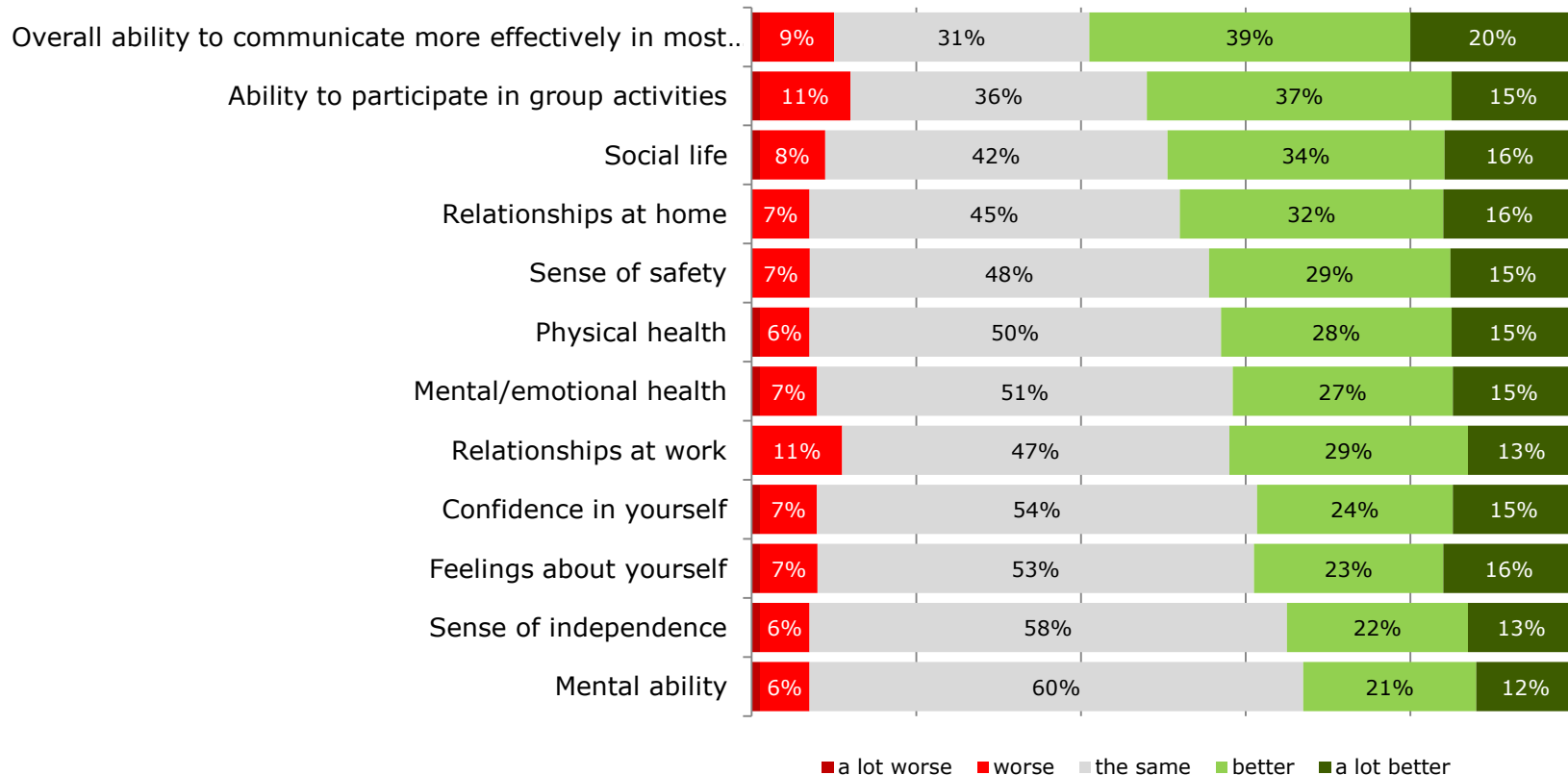


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# Positive impact of hearing aids, quality of life

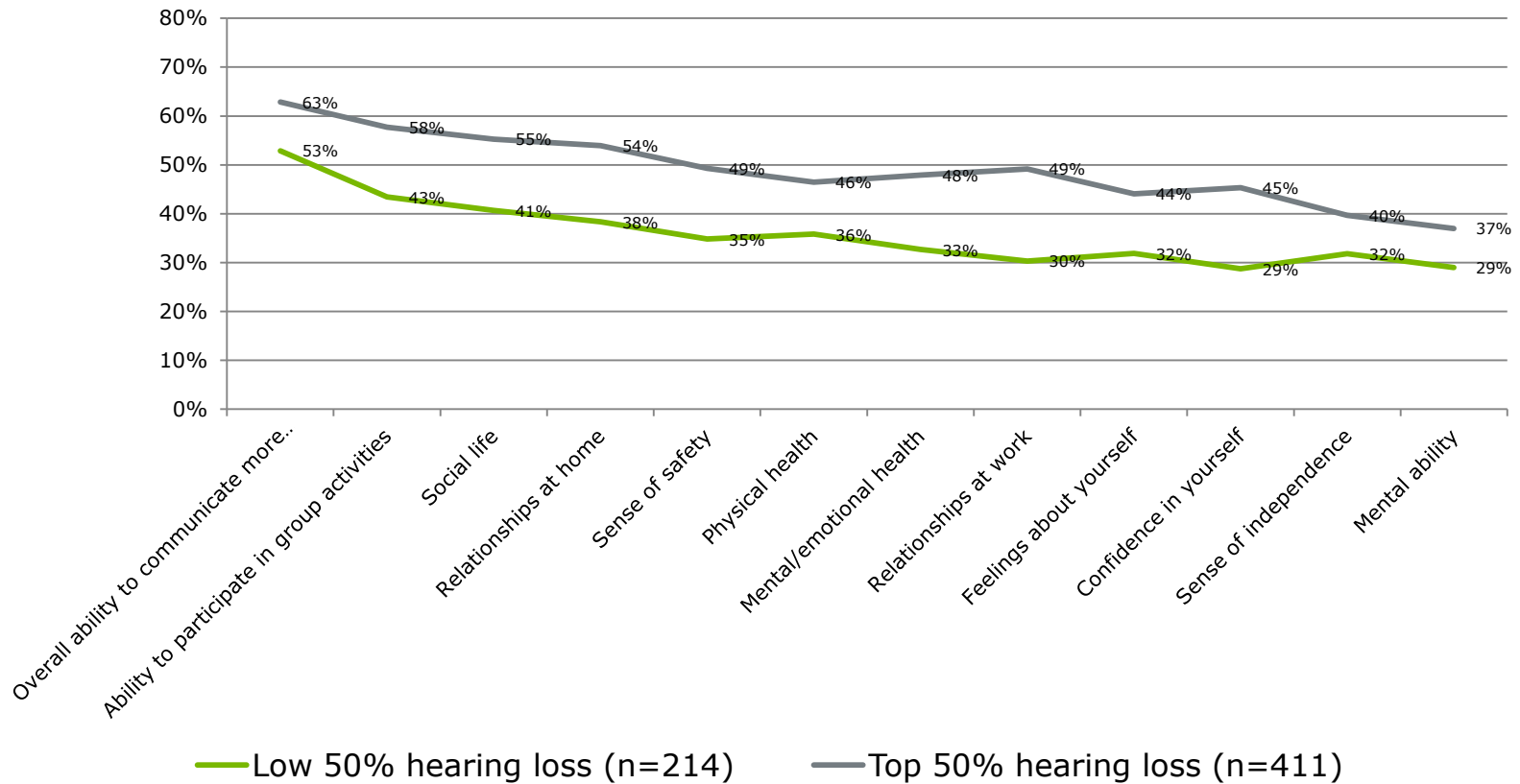
# Significant positive impact of HAs on different aspects: Especially communication effectiveness, social life, participating in group activities and relationships at home improve with hearing aids.

**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).**



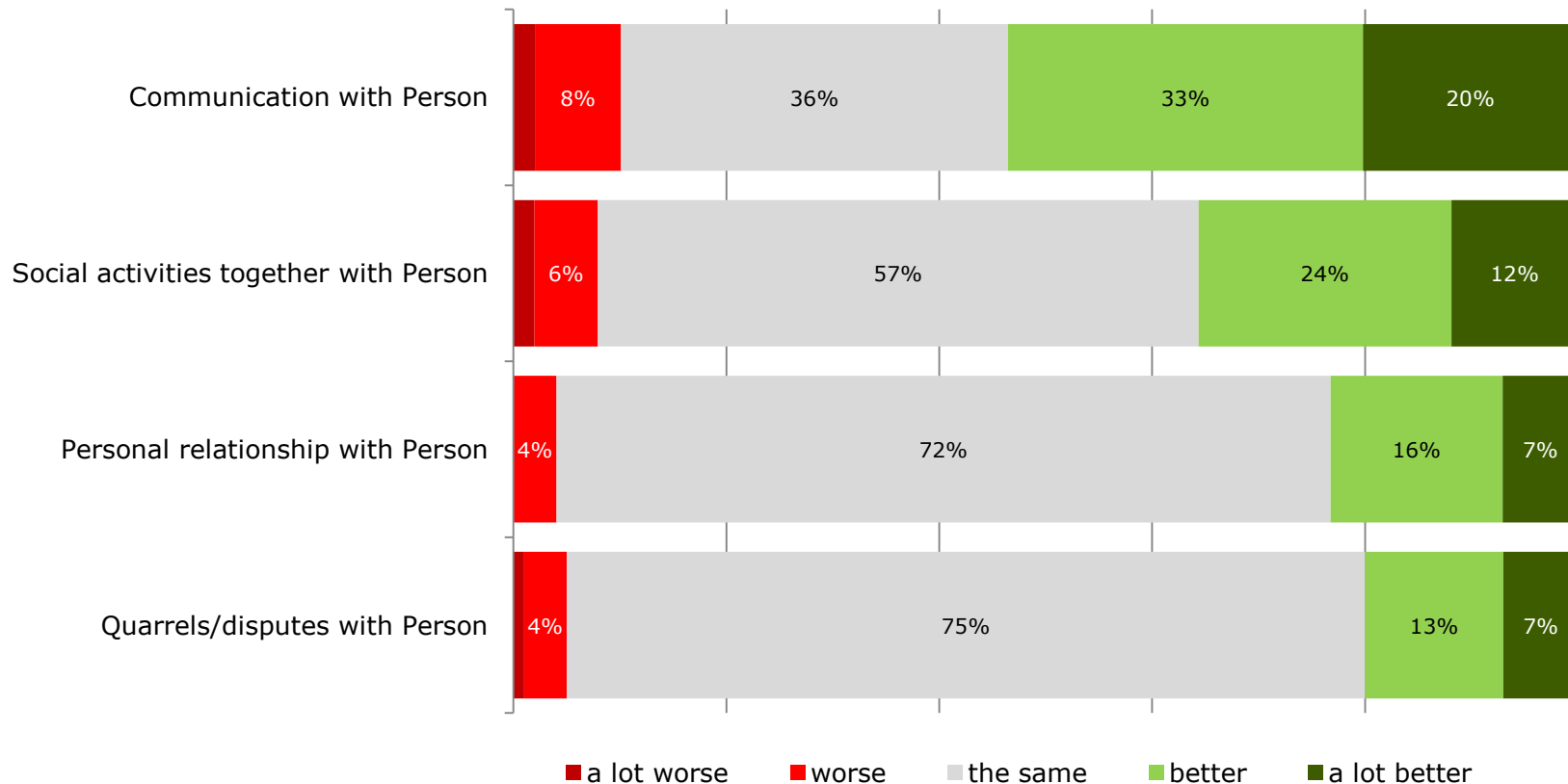
# Impact of HAs is perceived more positive by patients with a Top 50% hearing loss

**% of HA owners feeling better/a lot better**



# 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?**

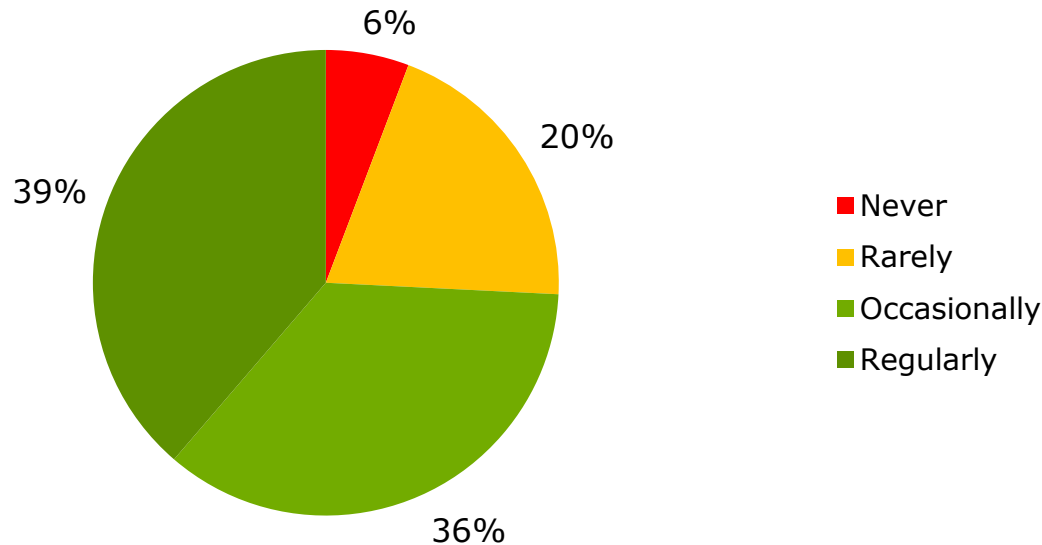


Someone in HH / parent has HA, n=607



# 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?



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## 4. Analysis of hearing impaired non-owners

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## Reasons for not having hearing aids

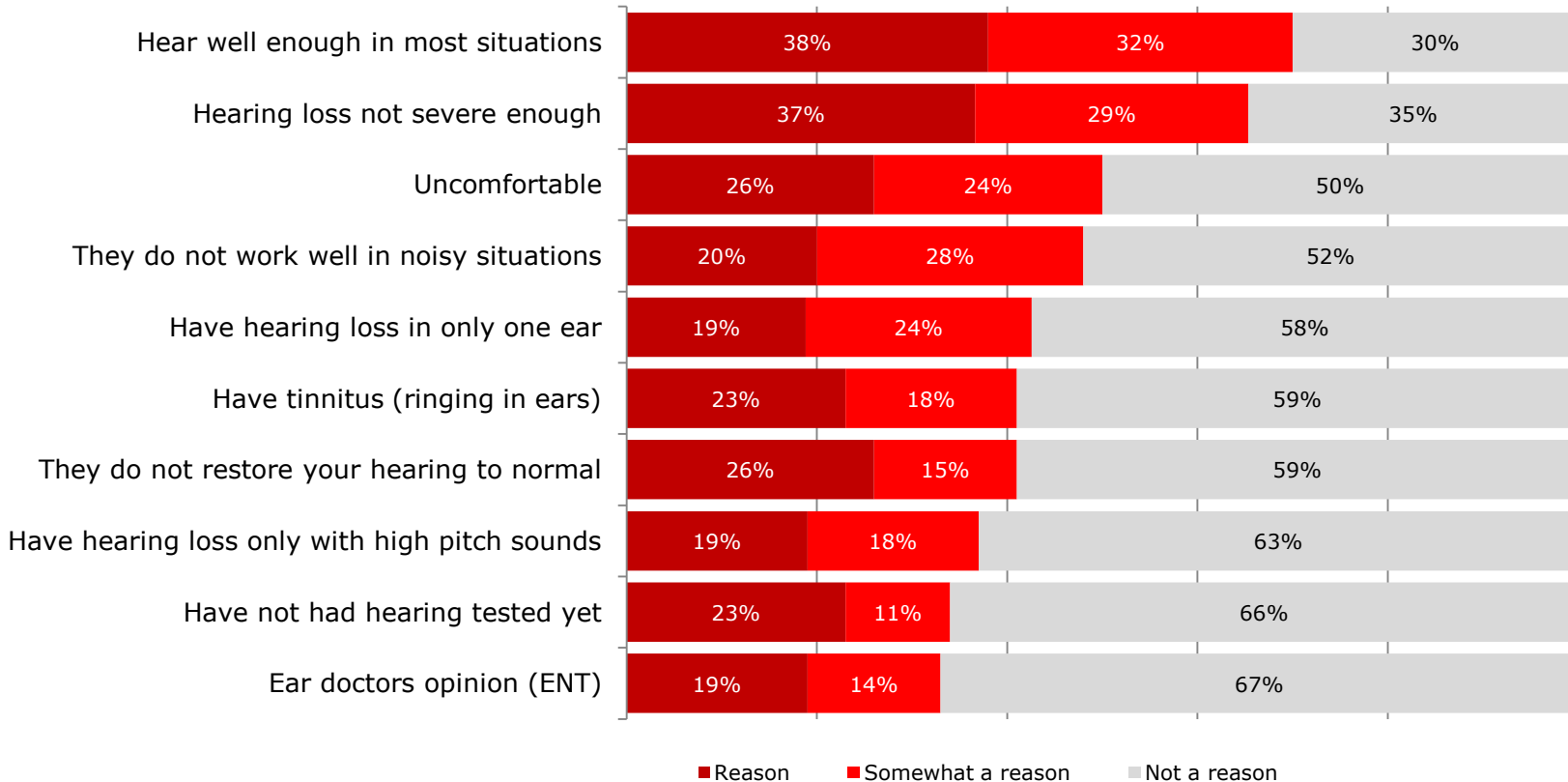


To analyse reasons of non-adoption we look at the Top 50% HL group, as the structure of hearing loss is more similar to that of HA owners

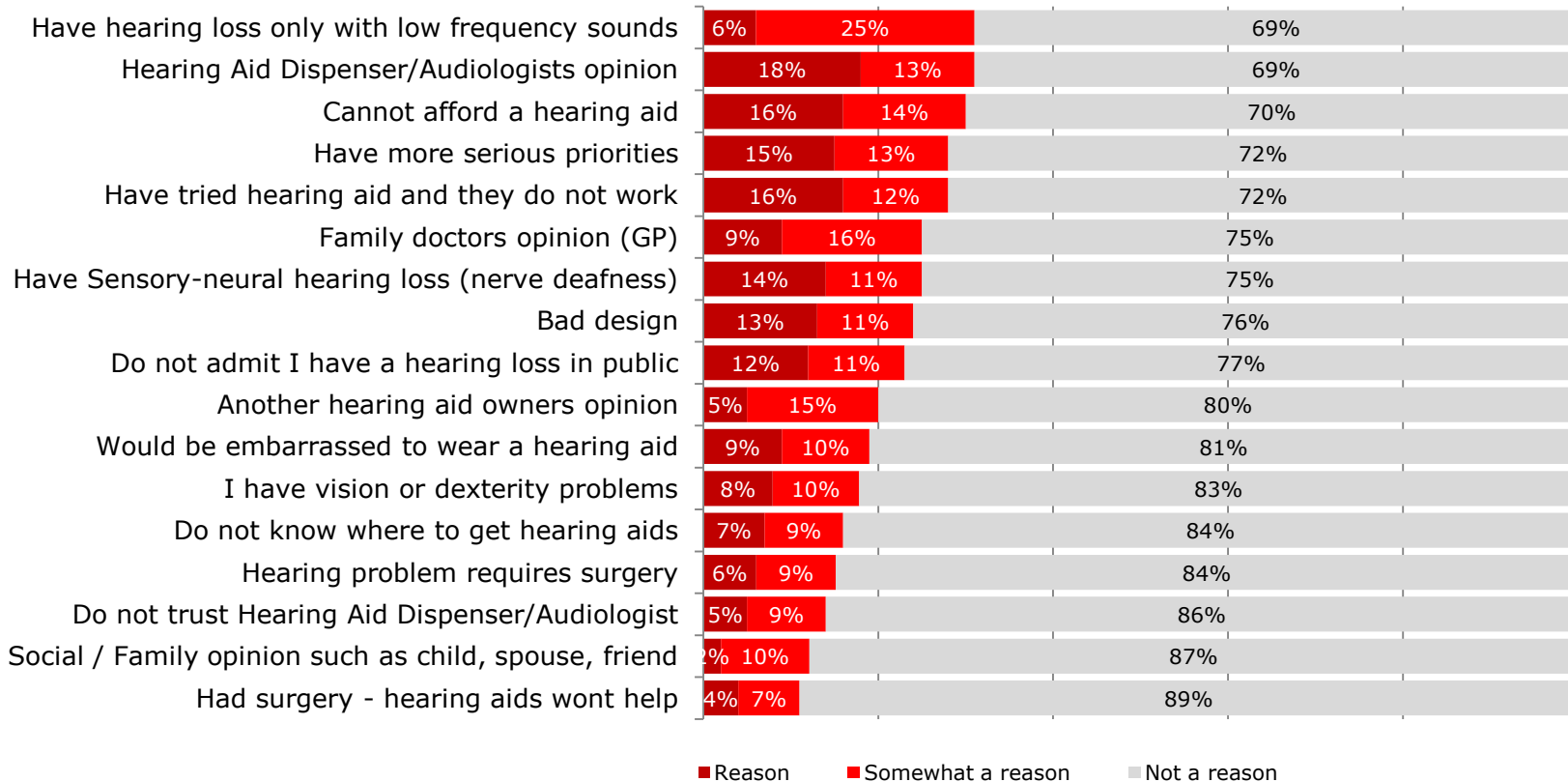
### Hearing loss characteristics: Owners compared to non-owners

	% HA Owner (n=711)	%HA-Non-owner Low 50% HL (n=274)	%HA-Non-owner Top 50% HL (n=143)
<b>Ears impaired</b>			
Unilateral loss	17%	44%	41%
Bilateral loss	83%	56%	59%
<b>Perceived loss</b>		More similar hearing loss-structure	
Mild	24%	81%	38%
Moderate	48%	14%	45%
Severe	21%	2%	11%
Profound	8%	2%	7%

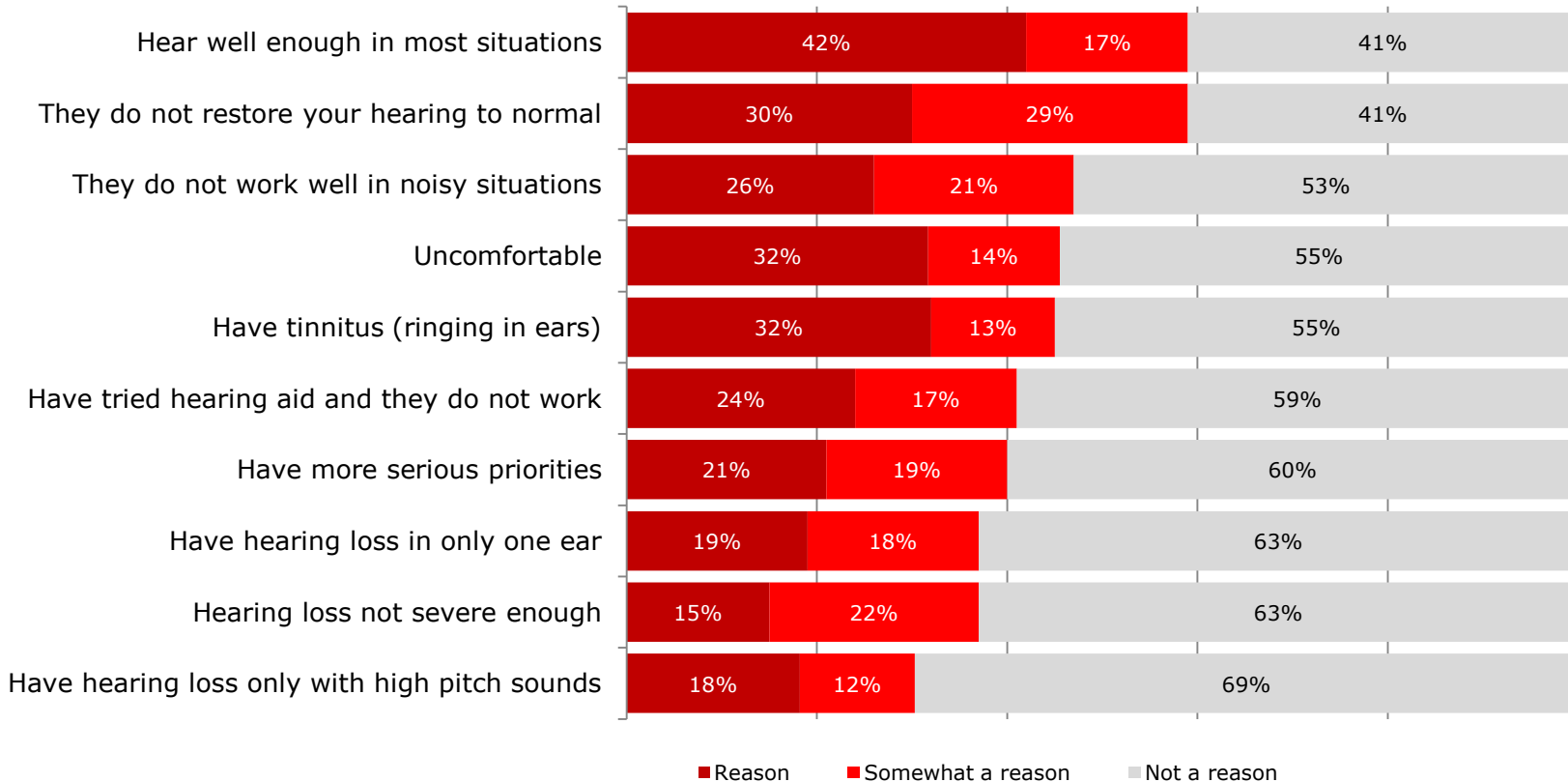
# Top 10 reasons for not having a hearing aid (I/II)



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



# Top 10 reasons for HA owners NOT using them



Owners who don't use, n=62

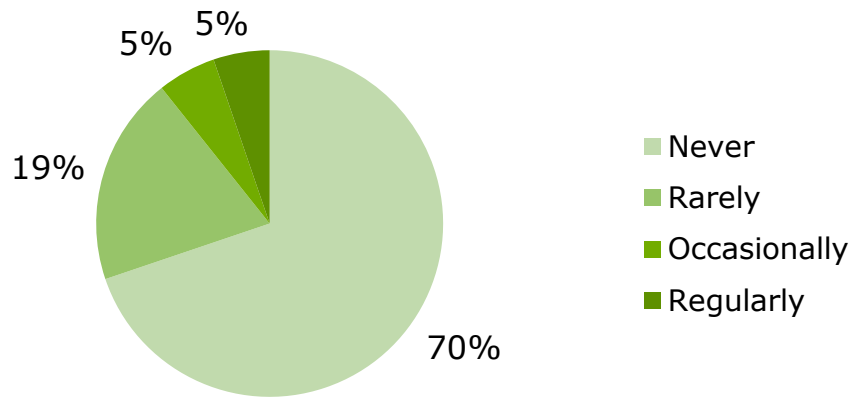


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# Social rejection because of hearing loss compared to the acceptance of hearing aids

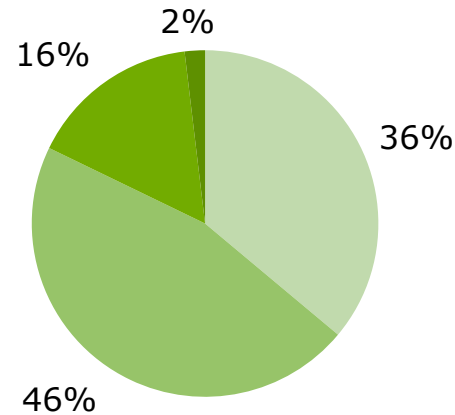
89% of hearing aid owners think people don't make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.

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



Base: N=711

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



Base: Top 50% hearing loss, no hearing aid N=143

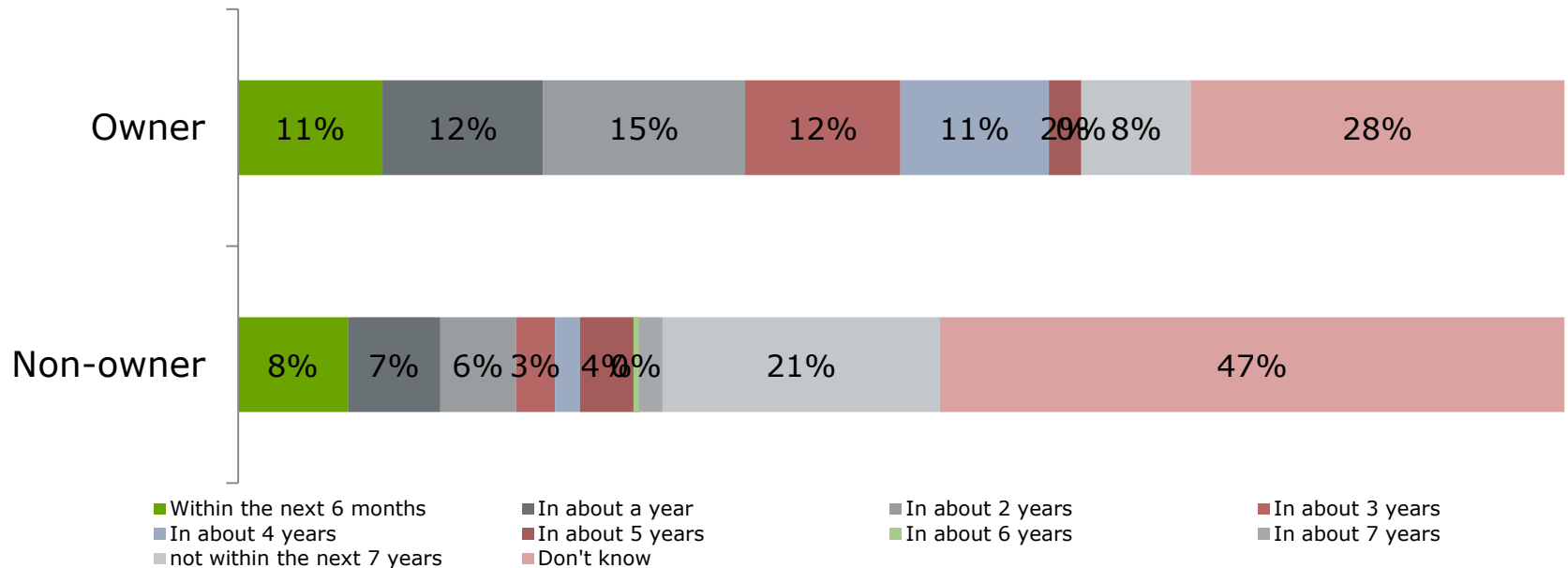


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# Buying intentions and most important triggers to buy

# 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 %**



HA-non-owner, n=593  
HA-owner, n=711

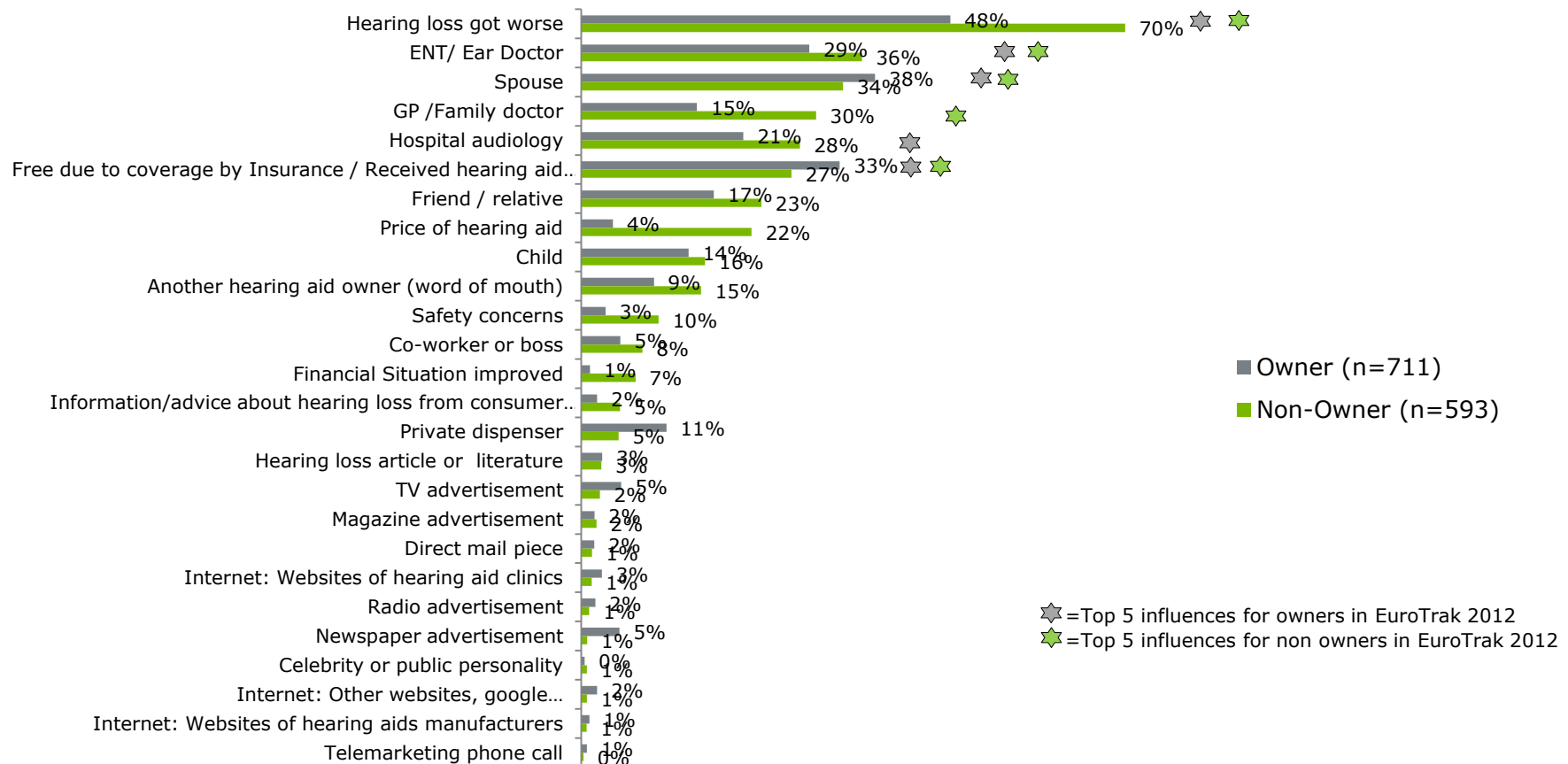




# The most important influencing factors are worsening hearing loss, the ENT and the spouse

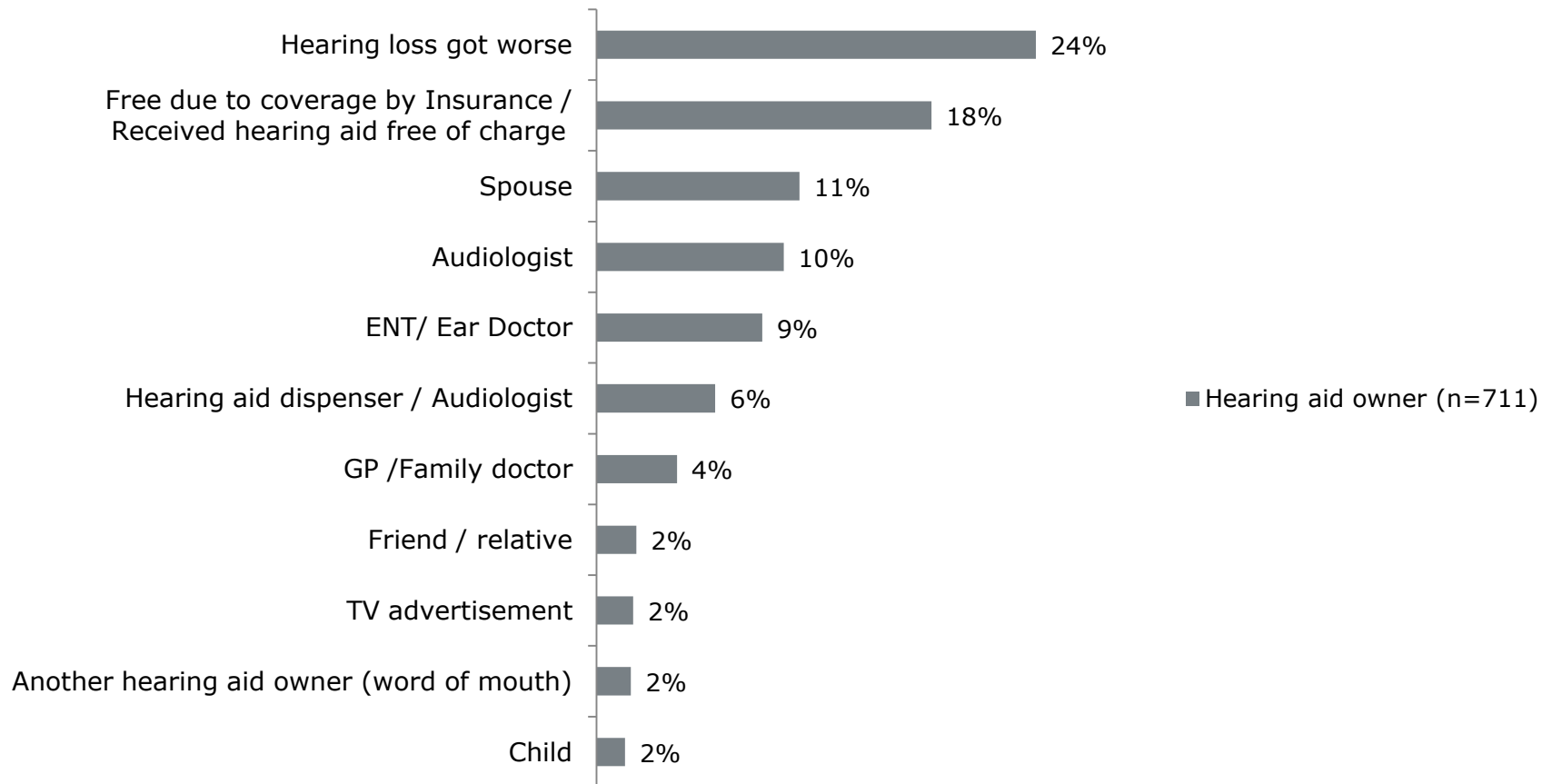
**Non-owner:** Think about the option to obtain / purchase a hearing aid. What do you think would influence you to obtain / purchase a hearing aid ?

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



# The most important trigger to buy a hearing aid is worsening hearing loss, the dispenser and the ENT.

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





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# APPENDIX

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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  $\pm 3.1$  around 15% - which means between 11.9% and 18.1% (Conservative assumption: 95% confidence level)

Sample size	Random sample error	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
	Real value is within interval:	
	Level of proportion: 50%/50%	Level of proportion: 15%/85%
50	$\pm 13.9$	$\pm 9.9$
100	$\pm 9.8$	$\pm 7.0$
250	$\pm 6.2$	$\pm 4.4$
500	$\pm 4.4$	<b><math>\pm 3.1</math></b>
1000	$\pm 3.1$	$\pm 2.2$
5'000	$\pm 1.4$	$\pm 1.0$
10'000	$\pm 1.0$	$\pm 0.7$

# Demographics (1) Hearing instrument adoption rates and populations

Profiles: Categories add to 100%\*

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
<b>Gender</b>						
<b>Male</b>	6'673	11.6%	51.5%	49.0%	58.0%	54.5%
<b>Female</b>	6'736	9.0%	55.0%	51.0%	42.0%	45.5%
<b>Age recoded</b>						
<b>1 - 14</b>	2'228	3.2%	33.3%	17.9%	7.4%	3.3%
<b>15 - 24</b>	1'775	3.2%	53.0%	14.3%	4.2%	4.2%
<b>25 - 34</b>	1'589	5.7%	30.2%	12.5%	9.7%	3.7%
<b>35 - 44</b>	1'723	6.2%	36.8%	13.4%	10.4%	5.4%
<b>45 - 54</b>	1'921	8.1%	39.2%	14.7%	14.5%	8.3%
<b>55 - 64</b>	1'650	12.9%	44.8%	11.9%	18.2%	13.1%
<b>65 - 74</b>	1'494	22.5%	62.7%	9.6%	19.3%	28.8%
<b>74+</b>	1'029	33.9%	69.8%	5.7%	16.2%	33.3%
<b>Type of household</b>						
<b>single household</b>	1'720	17.7%	61.7%	11.8%	18.1%	25.7%
<b>Couple, no kids</b>	3'307	14.4%	55.4%	23.5%	32.7%	36.0%
<b>Couple with kid(s)</b>	6'300	6.6%	45.9%	48.9%	34.9%	26.3%
<b>Single mom/dad with kid(s)</b>	928	5.6%	40.3%	7.3%	4.8%	2.9%
<b>Retirement home, hospital etc.</b>	126	37.2%	57.5%	0.7%	3.1%	3.7%
<b>Other</b>	1'029	8.0%	48.8%	7.9%	6.5%	5.5%



# Demographics (2) Hearing instrument adoption rates and populations

Profiles: Categories add to 100%\*

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
<b>Status</b>						
The head of the household (alone or together with someone)	6'103	13.7%	55.2%	44.8%	60.7%	66.7%
The spouse of the head of the household	2'948	11.4%	53.5%	22.3%	25.2%	25.7%
Daughter/son of head of household	3'254	2.6%	25.9%	27.0%	10.0%	3.1%
Other Person	754	7.6%	54.9%	5.9%	4.2%	4.5%
<b>Employment</b>						
Full time employed	4'676	8.3%	39.7%	44.0%	38.9%	21.8%
Part time employed	728	7.3%	63.4%	6.9%	3.3%	4.8%
Unemployed / not working	648	8.1%	47.7%	6.1%	4.6%	3.5%
Retired under a disability pension scheme (fully or partly)	292	7.4%	36.8%	2.8%	2.3%	1.1%
Early retired under an early retirement benefit scheme	948	13.9%	50.6%	8.4%	10.8%	9.5%
Retired (at the official retirement age)	2'174	28.0%	67.1%	16.0%	33.4%	58.0%
Student / pupil / in training	1'591	3.1%	18.1%	15.8%	6.7%	1.3%
<b>Education</b>						
Folkeskole	1'903	15.0%	57.4%	16.6%	20.3%	23.2%
Ungdomsuddannelse	1'039	6.4%	45.9%	10.0%	6.0%	4.3%
Erhvervsuddannelse/mesterlære	2'775	14.1%	52.4%	24.4%	31.1%	29.2%
Videregående uddannelse, kort - op til 3 år	1'681	12.4%	56.1%	15.1%	15.2%	16.6%
Videregående uddannelse, mellemlang - 3-5 år	2'196	10.7%	53.6%	20.1%	18.2%	18.0%
Videregående uddannelse, lang - mere end 5 år	967	8.1%	54.1%	9.1%	6.0%	6.0%
Andet	498	7.5%	49.4%	4.7%	3.2%	2.6%

