

Summary

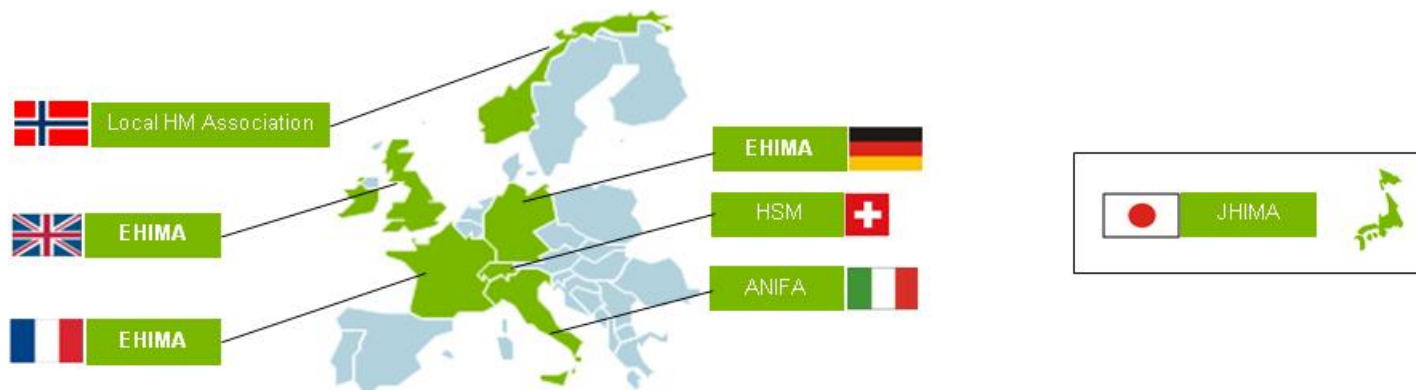
EuroTrak UK 2012

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

Summary

1. Introduction

- EuroTrak UK 2012 was designed and executed by Anovum (Zurich) on behalf of the European Hearing Instrument Manufacturers Association (EHIMA).
- Sample sizes UK 2012:
 - Representative sample (sample 1): n=14'896 people
 - Hearing impaired (sample 2): n=1'296 people
 - Hearing impaired non-owners: n=795 people with hearing loss (**HL**)
 - HA owners: n=501 people with hearing aid (**HA**)
- EuroTrak UK 2012 is part of the EuroTrak studies:



Summary

2. Market overview

- Stated hearing loss prevalence
 - Total: 9.1% (18+: 10.7%).
 - Binaural hearing loss: HA owners: 57%, HA non-owners: 76%.
 - Tinnitus prevalence 25% (self stated, sometimes or permanently).
 - Hearing Tests: 26% had a hearing test in the last 5 years.
- Hearing aid adoption rate (HA penetration)
 - Total: 41.1% (2009: 38.6%).
 - Total age group 18+: 42.2 % (2009: 38.5%).
 - 54% of HA owners have binaural treatment. Trend rising (2009: 47%).
- The route to the hearing aid
 - 73% 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 = 23%).
 - 49% of the GP consultations referred to an ENT, 38% to a hearing aid dispenser / audiologist (incl. NHS). 13% recommended no action.
 - 43% of ENT consultations referred to a hearing aid dispenser / audiologist (incl. NHS), 37% recommended to get a hearing aid, 26% 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
 - People with hearing aids tend to have a higher personal income
 - Hearing aid owners have a much lower risk of being depressed and a lower risk of being forgetful compared to impaired non-owners

Summary

3. Analysis of hearing aid owners

- Hearing aid ownership and usage
 - 84% received NHS hearing devices.
 - 79% of the currently owned HAs were fitted in 2009 or later.
 - The average age of the currently owned HAs is 2.1 years.
 - The median age of hearing aids before replacement is 5 years.
 - On average, HAs are worn 8.3 hours a day.
 - 85% of the currently owned HAs either had no service need or only once.
 - 61% of hearing aid owners have never heard of wireless technology in connection with hearing aids. Only 10% of the older (65y+) rate wireless technology as very important but 43% of the younger (up to 44 y).
- Satisfaction with HAs
 - 72% of the HA owners are satisfied with their HAs.
 - The more hours worn per day, the higher the satisfaction.
 - Satisfaction with HAs bought 2010 or after is higher than with HAs bought before.
 - Satisfaction in the private sector has decreased since EuroTrak2009 while NHS devices remained on the same satisfaction level.
 - NHS clients are more satisfied with the dispenser compared to the private sector.
- Positive impact of HAs
 - Significant positive impact of HAs on different aspects – especially communication and social life.

Summary

4. Analysis of hearing impaired non-owners

- Reasons not to own/use HAs
 - Information deficit non-owners: 56% don't know whether insurance would pay, 21% assume they don't pay.
 - The main reasons for not using hearing aids are that people say they hear enough and that they argue hearing aids are uncomfortable.
 - 8% who own HAs don't use them at all; 19% use them less than one hour/day. Main reasons for this are: "HAs do not restore hearing to normal", "uncomfortable" and "have tried and they do not work" .
- Negative impact of hearing loss and buying intentions
 - Compared to impaired hearing aid non-owners with significant hearing loss (Top 50% hearing loss-group), hearing aid owners feel less exhausted in the evenings.
 - 12% of non-owners intend to get a hearing aid within the next year.
 - The most important influencing factors are worsening of hearing, GP, ENT and NHS audiologist. Non-NHS audiologists became less important compared to 2009.

Results

EuroTrak UK 2012

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

Detailed Results: Roadmap

1. Introduction

- Objectives and organisation
- Field research specification

2. Market overview

- Prevalence of hearing loss and hearing aid adoption rate
- Hearing tests and prevalence of tinnitus **new in 2012**
- The route to the hearing aid: Drop-out rates and reasons for drop-outs **new in 2012**
- Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms **new in 2012**

3. Analysis of hearing aid owners

- Hearing aid ownership, lifetime **new in 2012** and usage
- Awareness and importance of wireless technology **new in 2012**
- Satisfaction with hearing aids and drivers
- Positive impact of hearing aids

4. Analysis of hearing impaired non-owners

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

5. Appendix

- Demographics: Hearing instrument adoption rates and populations

1. Introduction

Objectives and organisation

Organisation of EuroTrak 2012

Organisation

- Principal of the project EuroTrak is the European Hearing Instrument Manufacturers Association [EHIMA]. Members of EHIMA are: GN Resound, Oticon, Phonak, Siemens, Starkey and Widex [EHIMA Companies].
- 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.
- EHIMA approved the questionnaire in cooperation with Sergei Kochkin, Ph.D., Executive Director, Better Hearing Institute.

Use of the data

- The principal as well as the EHIMA companies may use the anonymous delivered tables, charts, reports and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.
- The raw dataset remains at Anovum. If the principal or the EHIMA companies use the anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications the source of the data needs to be mentioned in the following way:
"Source: Anovum – EuroTrak – UK/2012/n=[relevant sample size]"
- The principal and EHIMA companies can ask Anovum to further analyse the raw data in specific ways at their own expense.

Field research specification

Not in
present
ation

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 a panellist pool of more than 100'000 people
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of **n=14'896** people based on census data.

Step 2: Target population interviews

Objective: Details about satisfaction with hearing aids and reasons for non-adoption

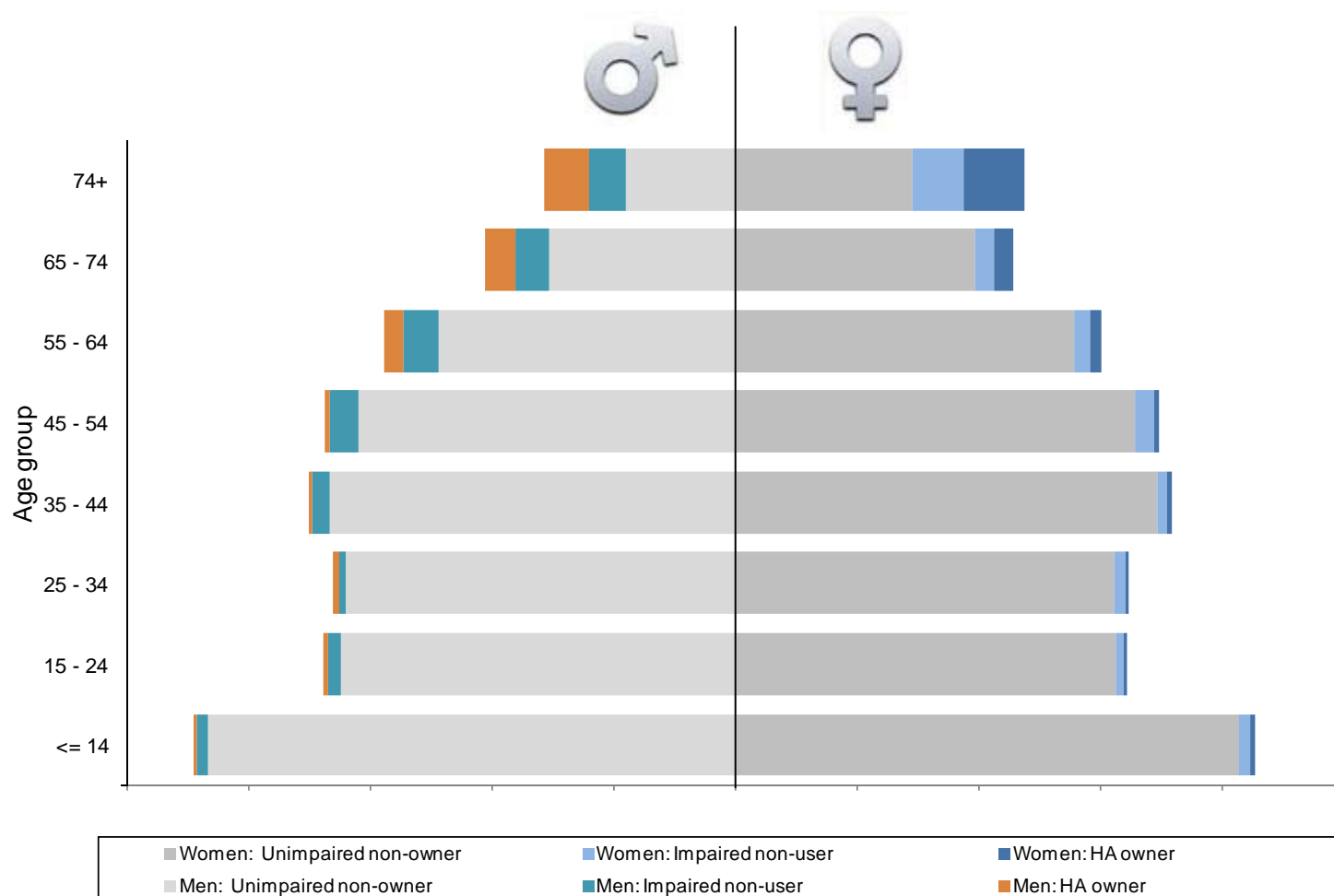
Process:

1. Main questionnaires: Owners and hearing impaired non-owners
2. Balancing through weighting according to representative screening interviews
3. Resulting sample: **n=501** hearing aid owners and **n=795** hearing impaired non-owners

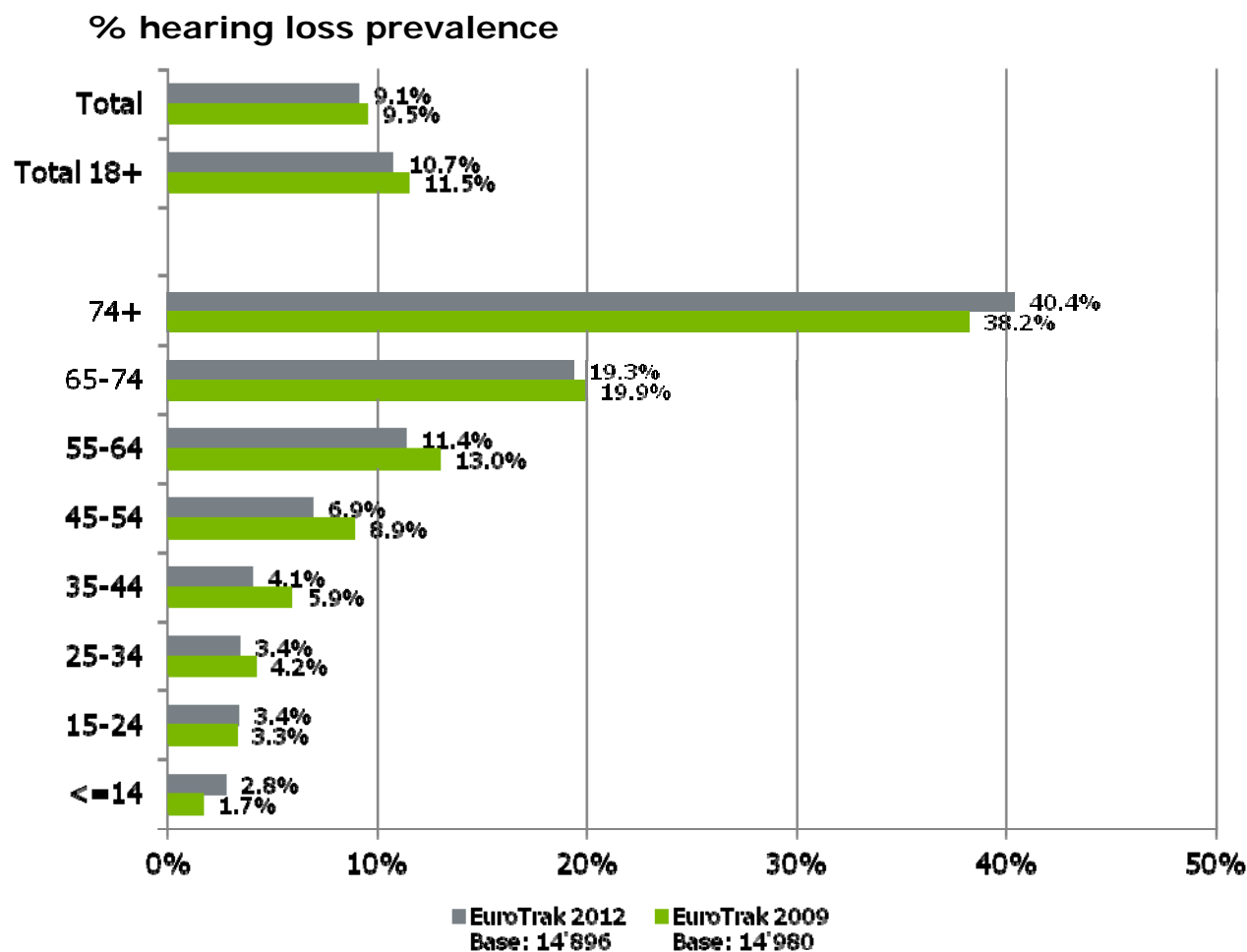
2. Market overview

Prevalence of hearing loss and adoption rate

Hearing loss and hearing instrument ownership by gender/age

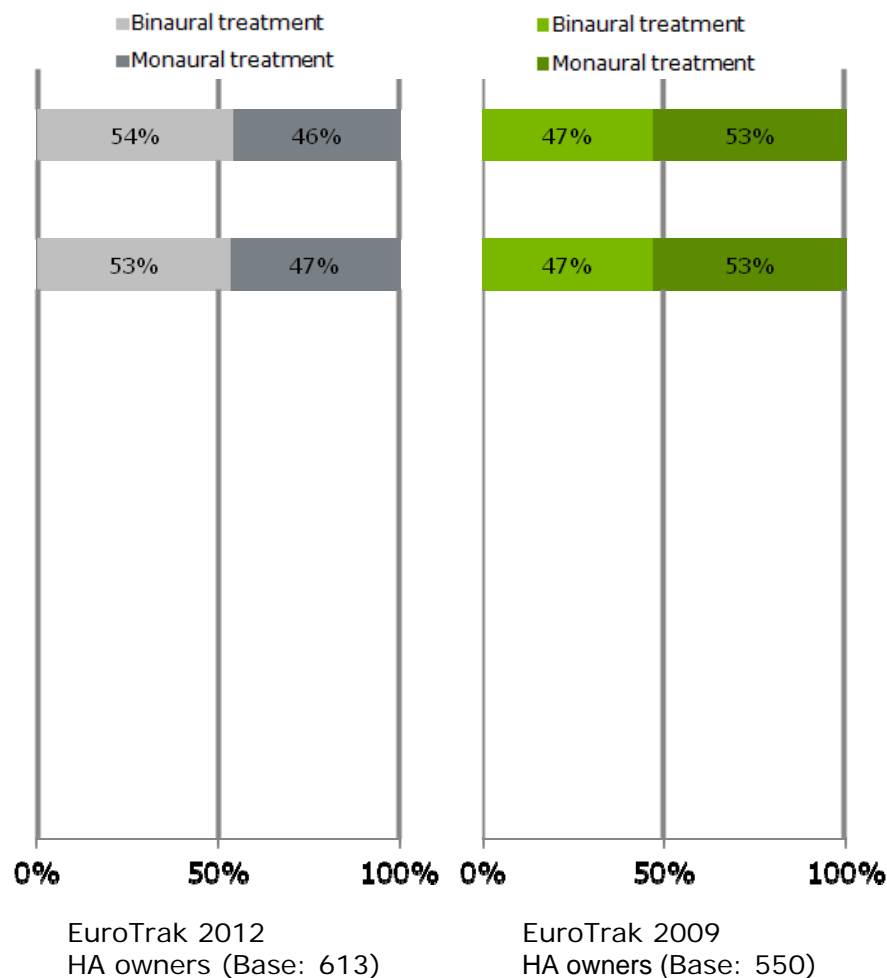
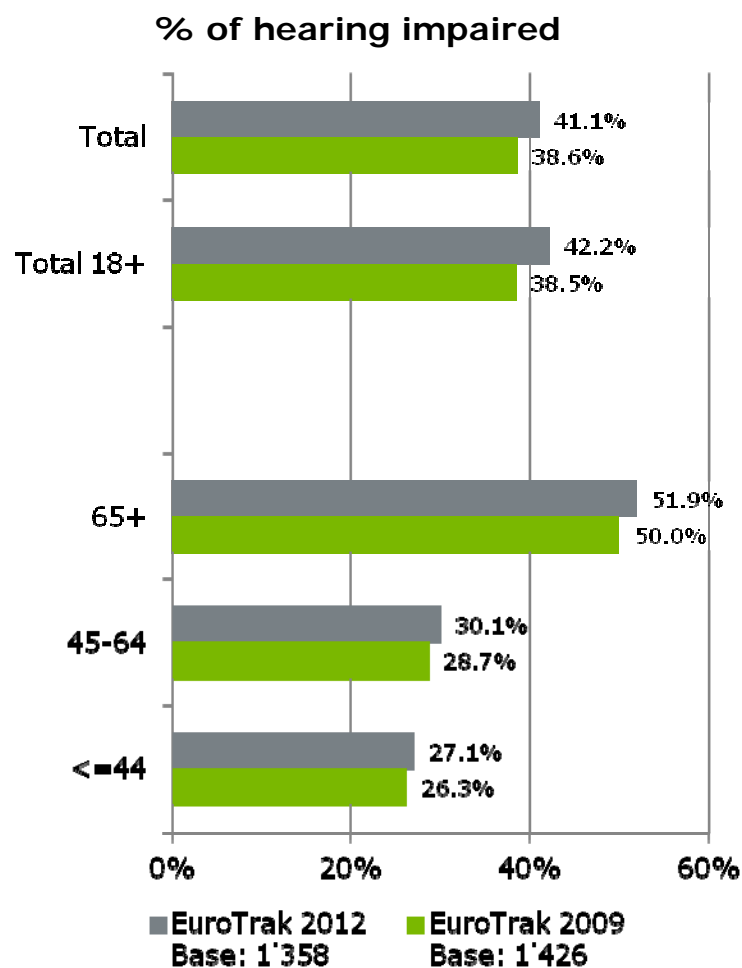


Hearing loss prevalence UK 2012

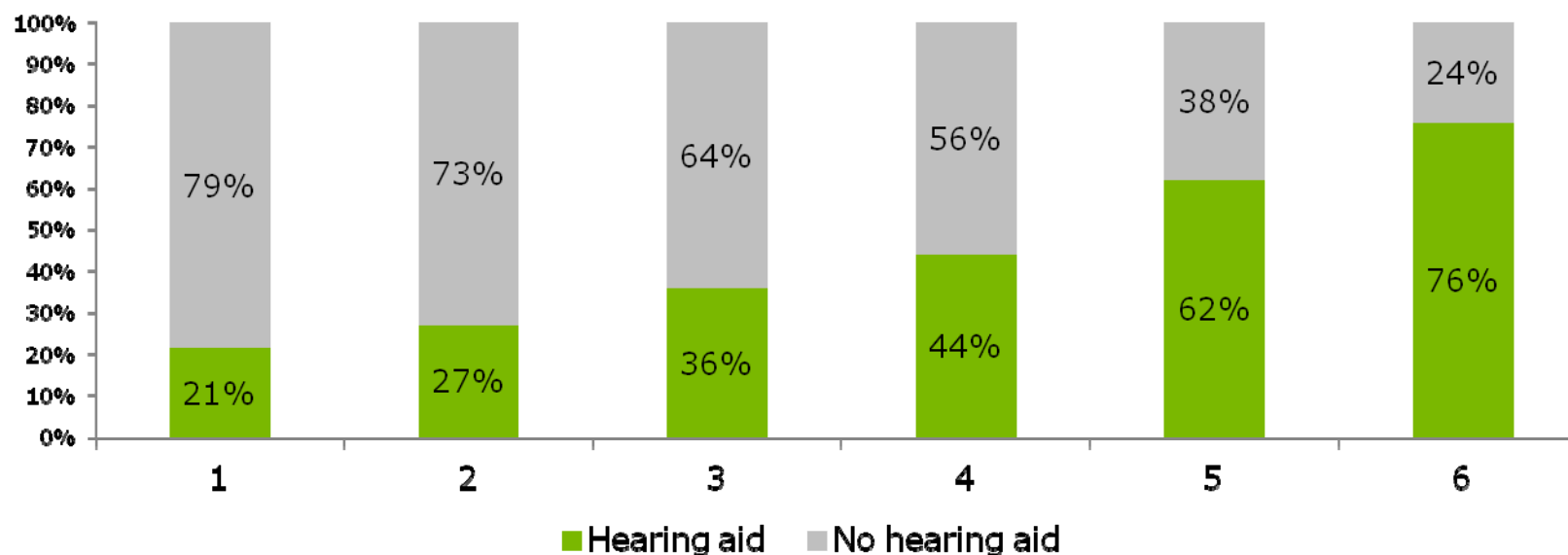


Hearing aid adoption rate UK 2012

41.1% of hearing impaired have hearing aid(s), 54% of them have binaural treatment



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



Hearing loss 6-groups*

HA-non-owner, n=795
HA-owner, n=501

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

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





Hearing loss

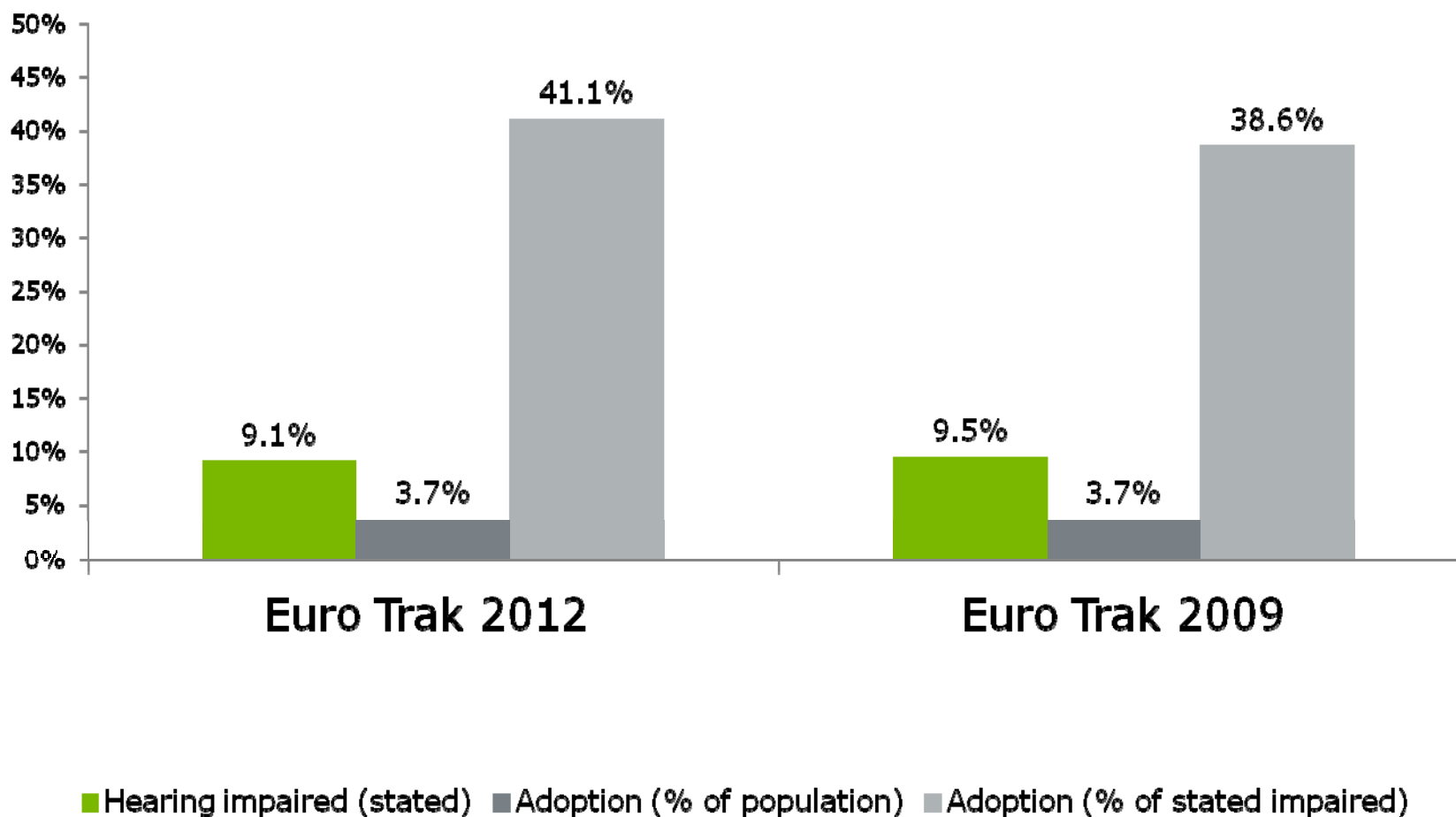
Hearing loss characteristics: Owners compared to non-owners

	HA-Non-owner 2012: n= 795 (2009: n= 822)	HA Owner 2012: n= 501 (2009: n= 513)	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	44% (46%)	24% (33%)	30% (32%)
Bilateral loss	57% (54%)	76% (67%)	51% (45%)
Perceived loss			
Mild	43% (42%)	9% (11%)	13% (14%)
Moderate	44% (50%)	53% (57%)	46% (42%)
Severe	10% (5%)	32% (29%)	66% (73%)*
Profound	4% (2%)	6% (3%)	

n's are unweighted whereas the shown results are weighted

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

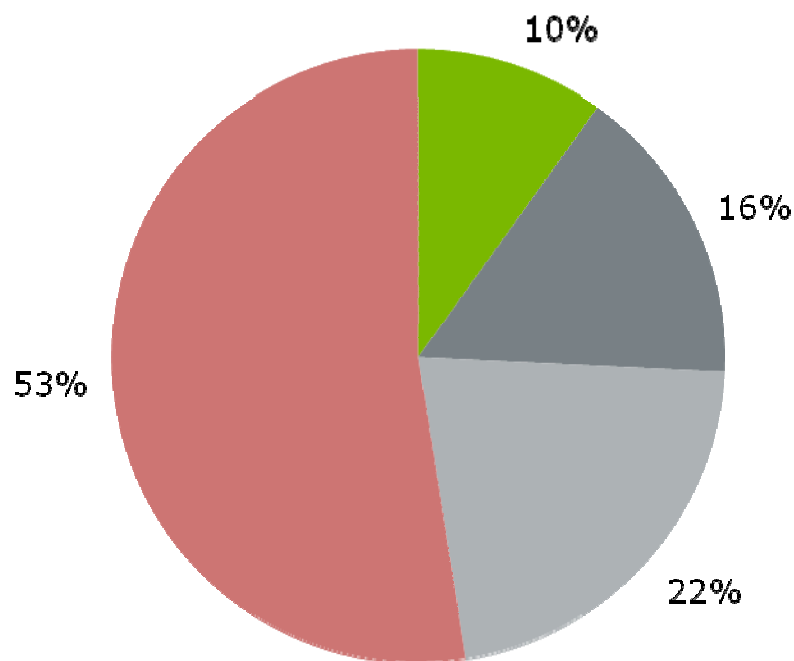
Overview hearing loss prevalence and hearing aid adoption



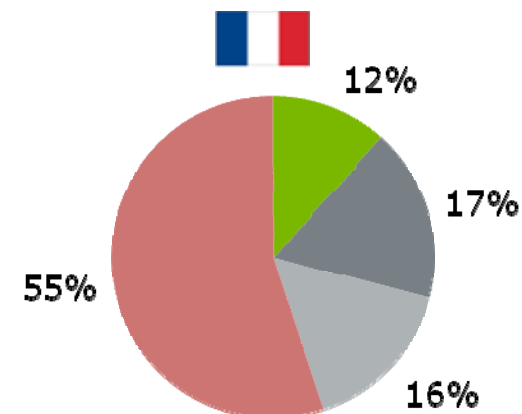
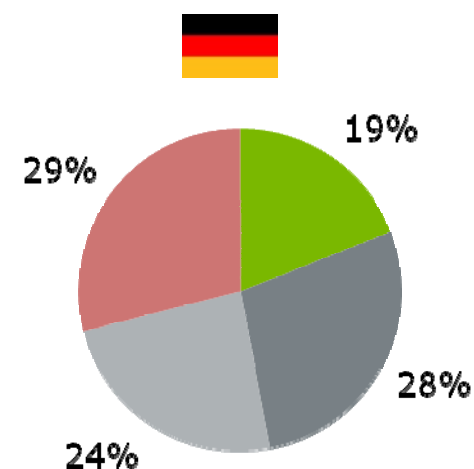
Hearing tests and prevalence of tinnitus

More than half of population state their hearing has never been tested

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

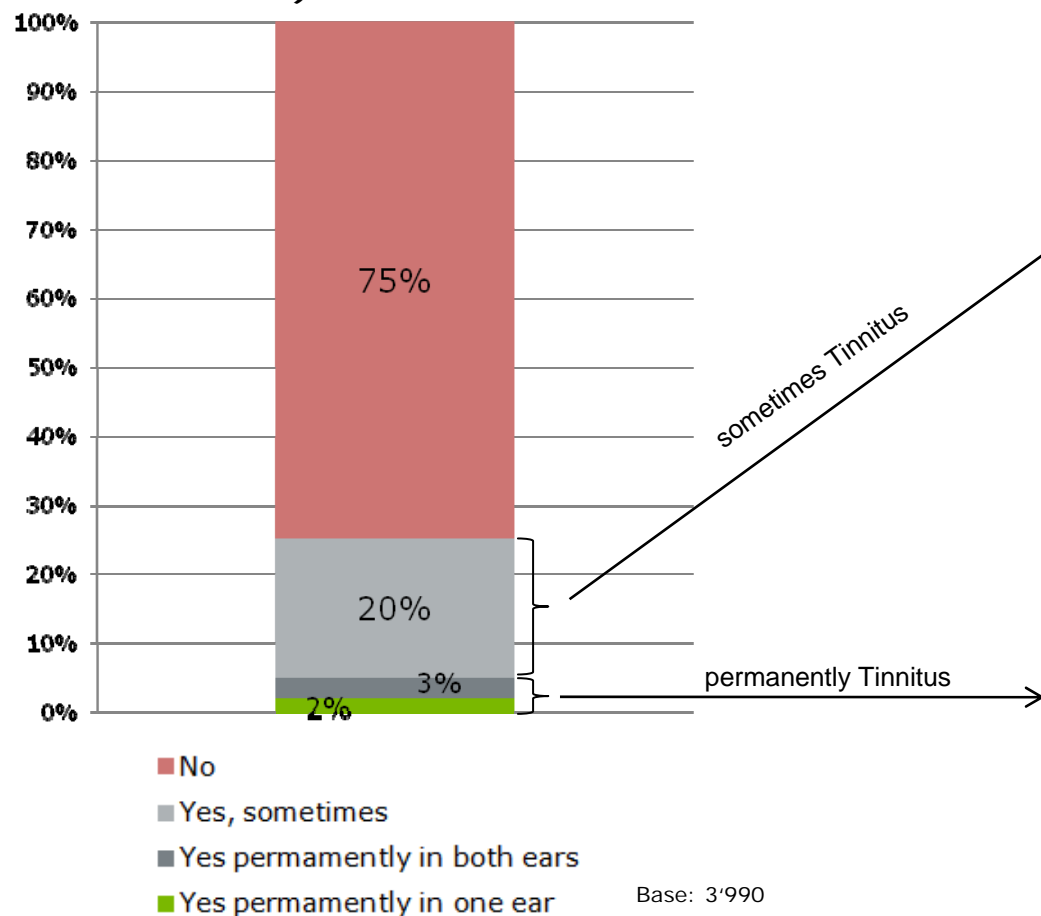


Base= 11039

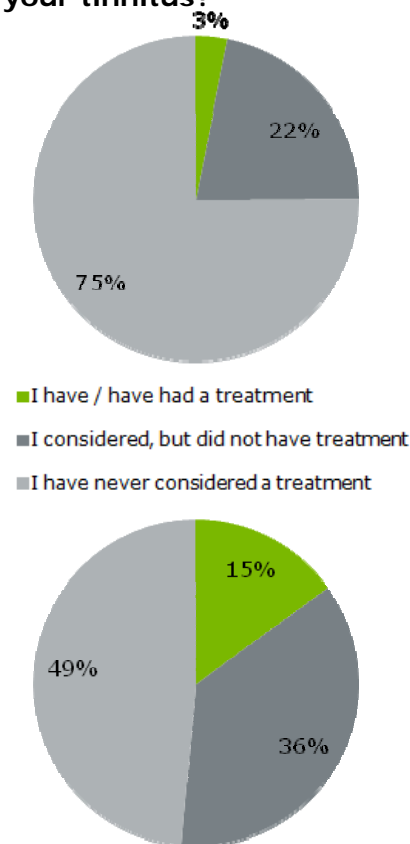


Prevalence of tinnitus

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

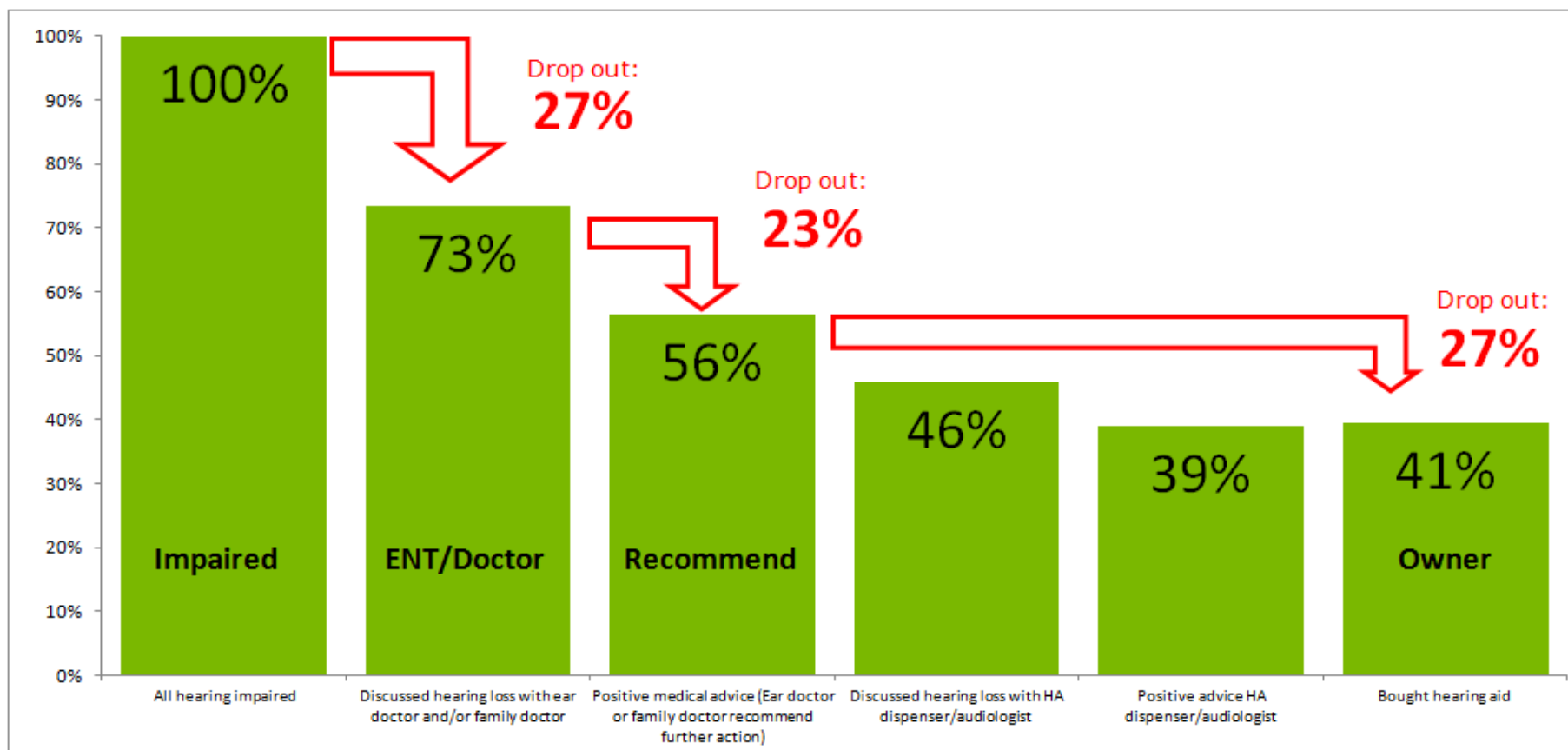


Have you ever thought about a treatment of your tinnitus?



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

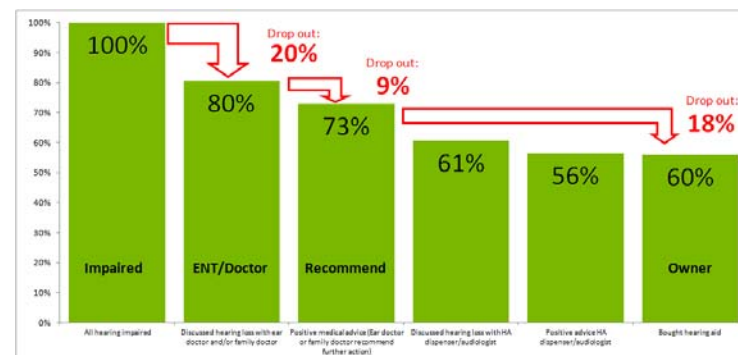
The route to the hearing aid: Overview



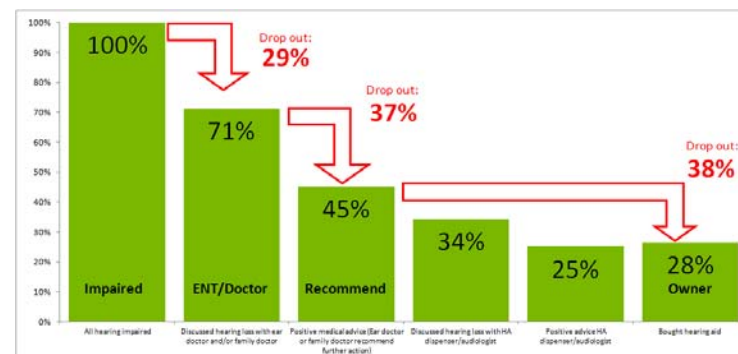
Base: n=1'296

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

Top 50% hearing loss*



Low 50% hearing loss*

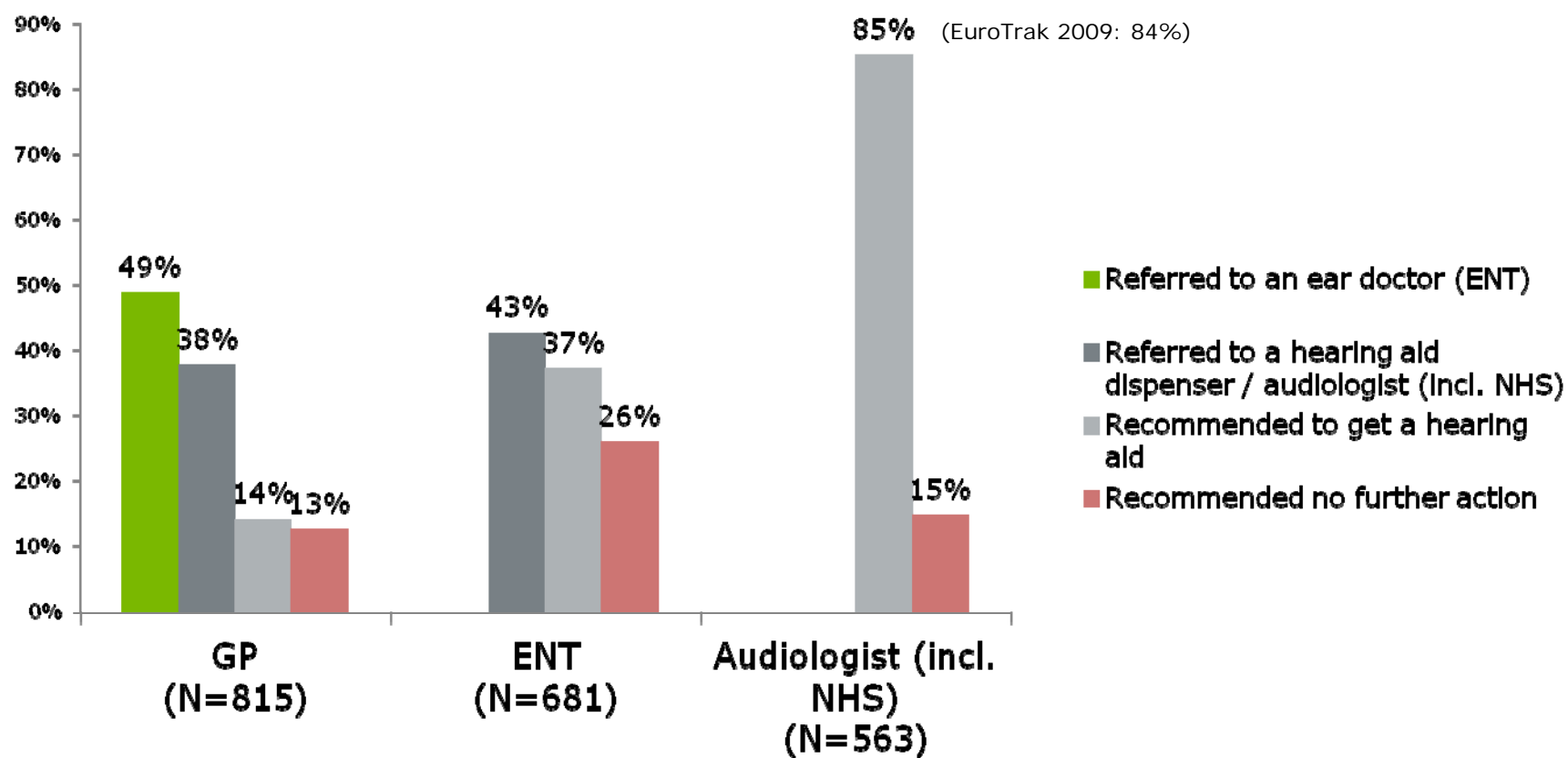


Base: n=1'296

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

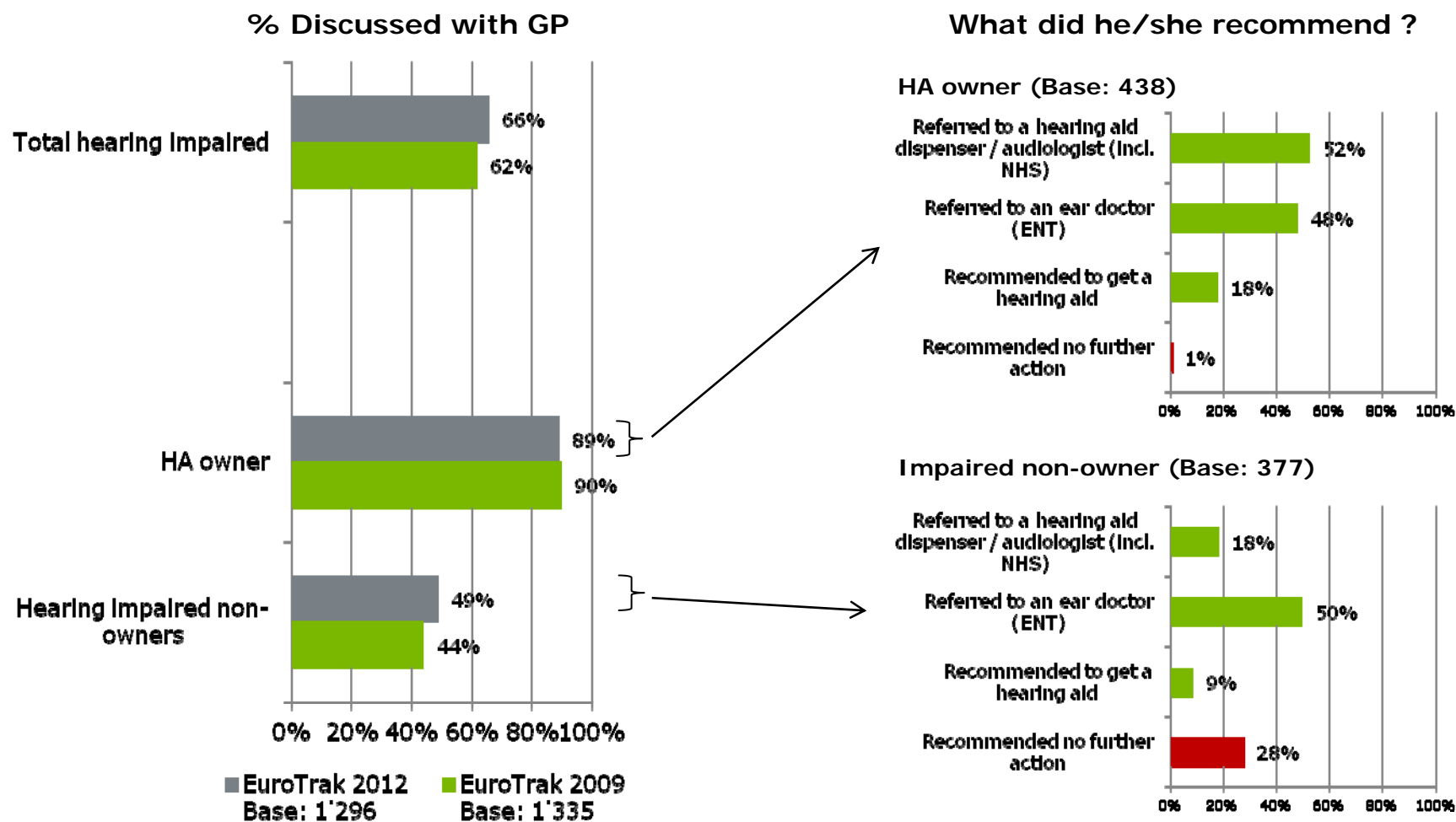
- Number of ears impaired (one or two)
 - Stated hearing loss (Mild to Profound)
 - Scores on 6 APHAB-EC – like questions (Scaled 1-5)
 - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67%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

Recommendations by profession



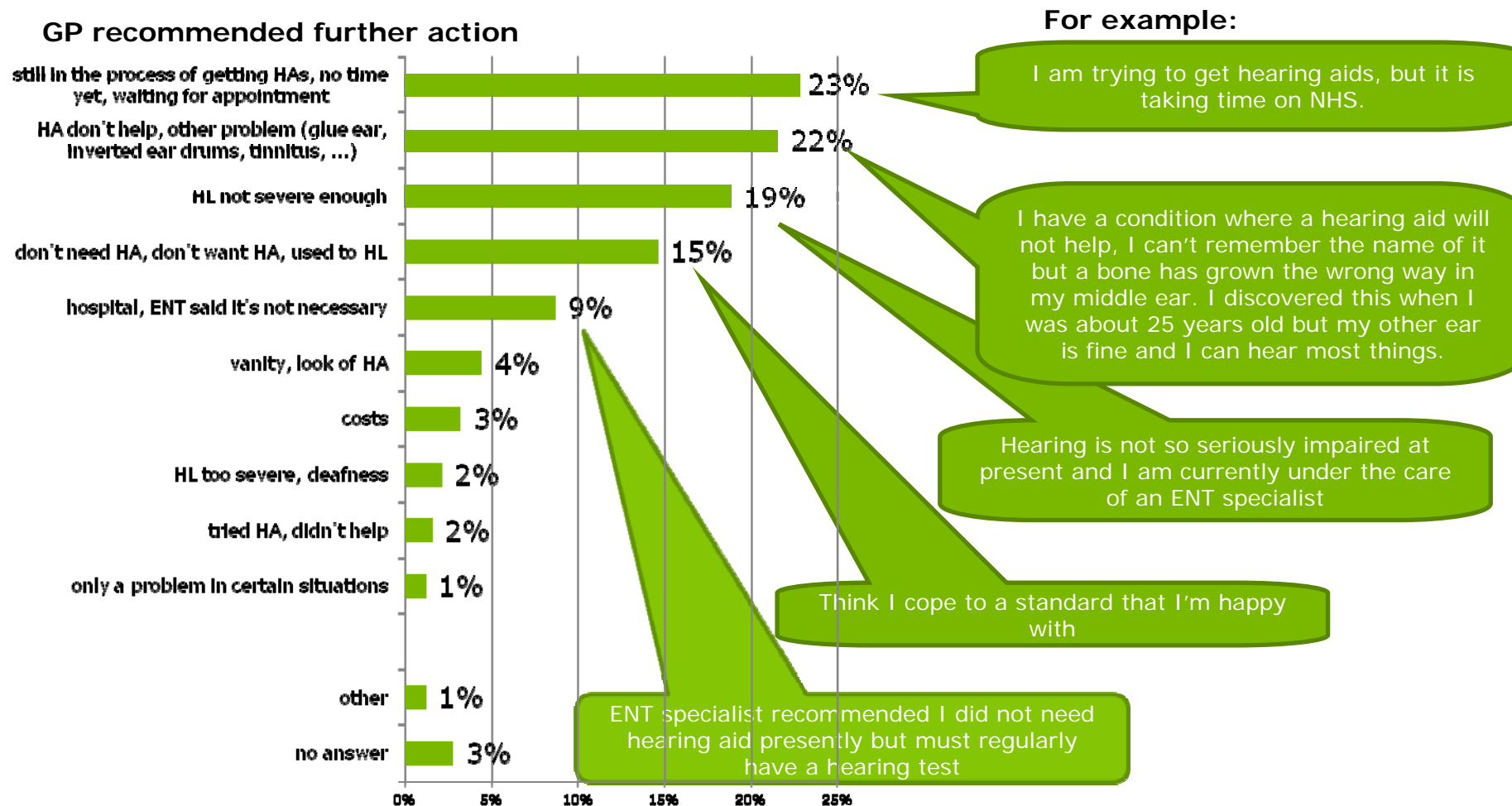
The route to the hearing aid: GP/Family doctor

Have you discussed your hearing problem with your family doctor?



Non-owners: Reasons for not owning a HA

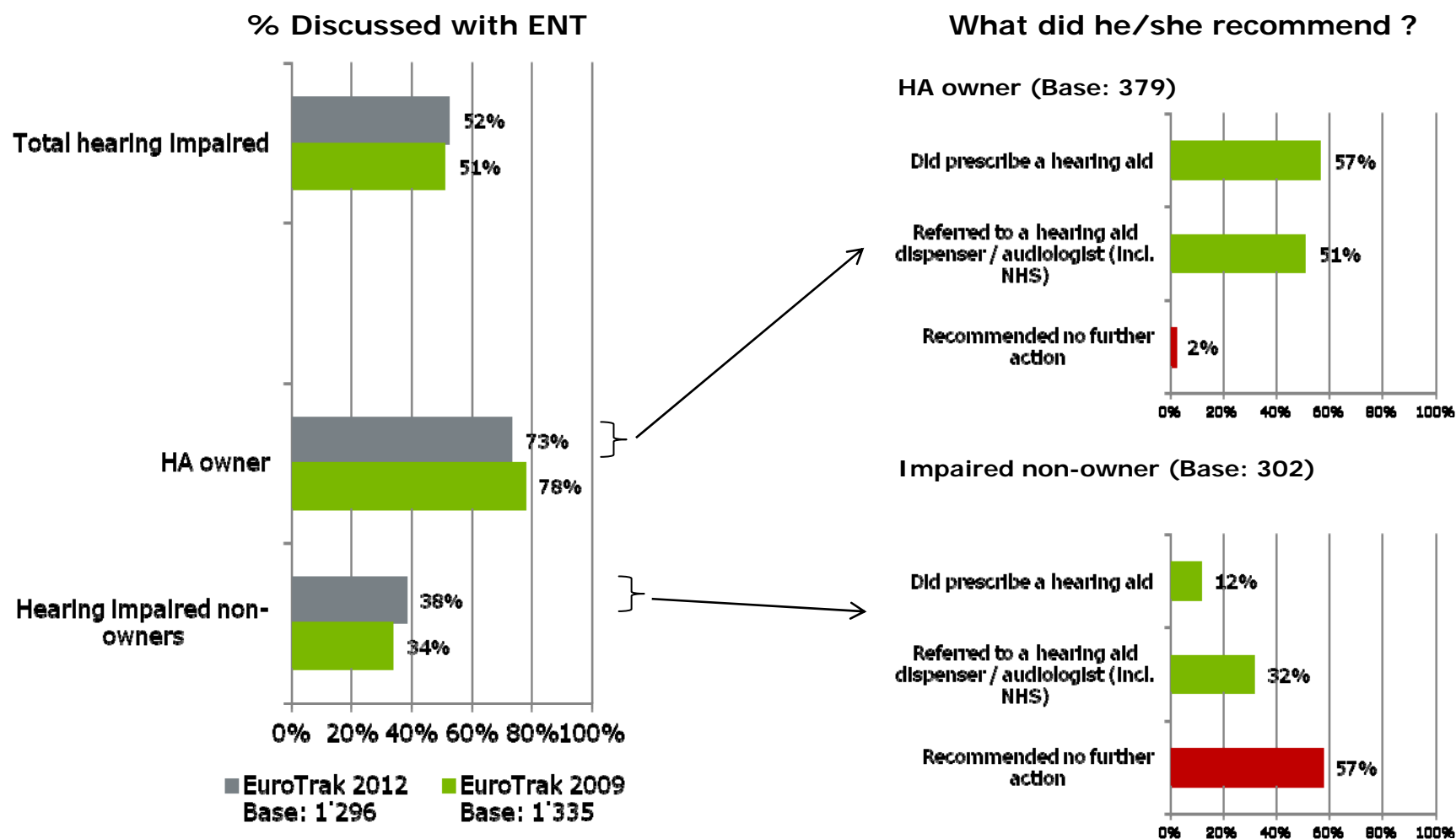
If GP recommended further action (open ended question)



Base: 253

The route to the hearing aid: ENT

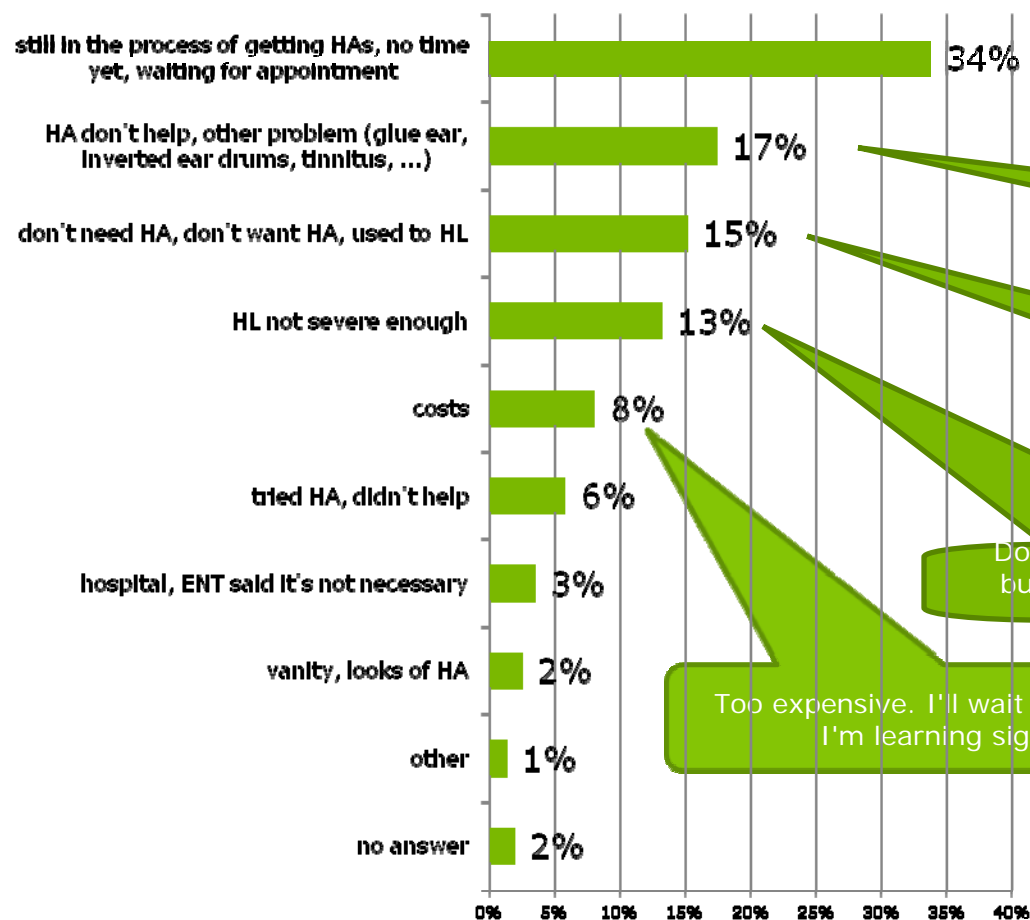
Have you discussed your hearing problem with an ear doctor (ENT)?



Non-owners: Reasons for not owning a HA

If ENT recommended further action (open ended question)

ENT recommended further action



For example:

I am not against having a hearing aid - just waiting.

The hearing aid was not successful and I was prescribed a tinnitus blocker instead.

Didn't want to wear one.

Doctor said that I could have a hearing aid, but that it was not essential, so the choice was mine.

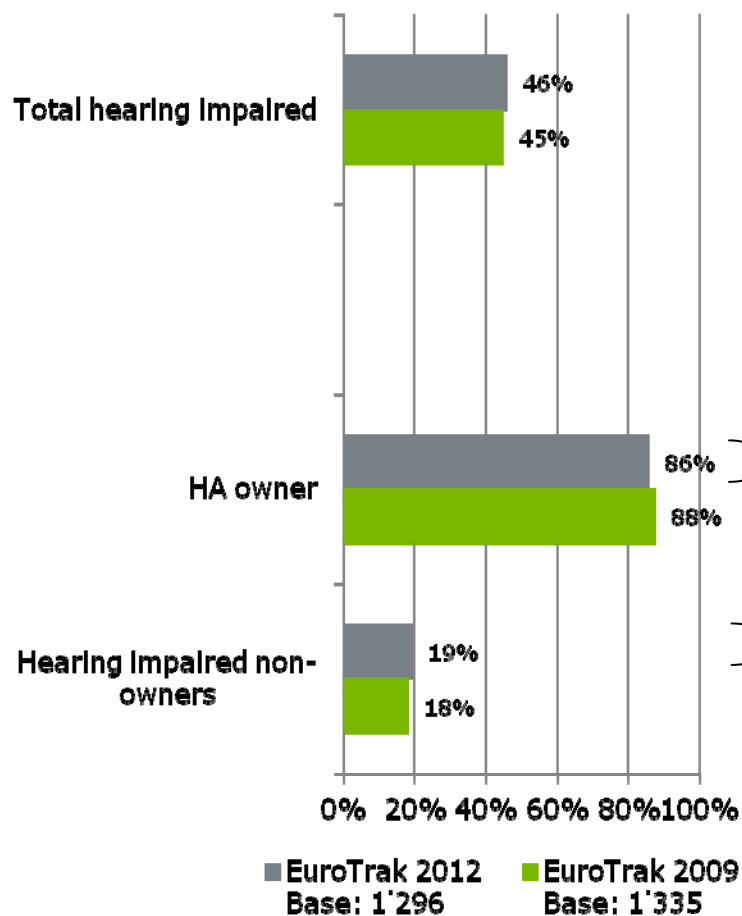
Too expensive. I'll wait until it gets worse. I'm learning sign language.

Base: 107

The route to the hearing aid: Audiologist (incl. NHS)

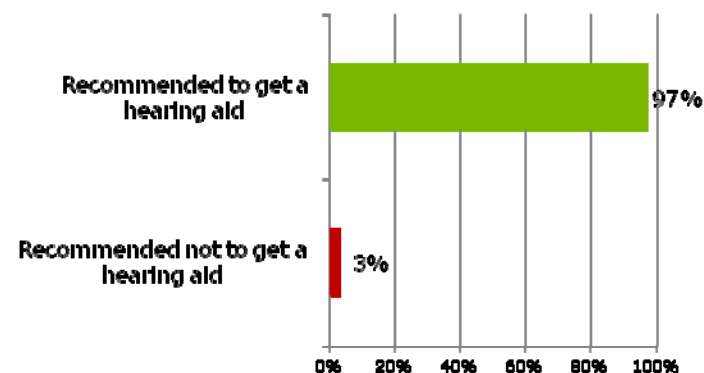
Have you discussed your hearing problem with a Hearing Aid
Dispenser/Audiologist?

% Discussed with Audiologist

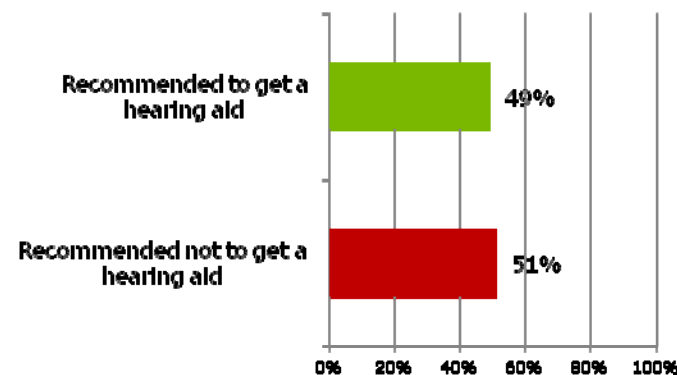


What did he/she recommend ?

HA owner (Base: 408)



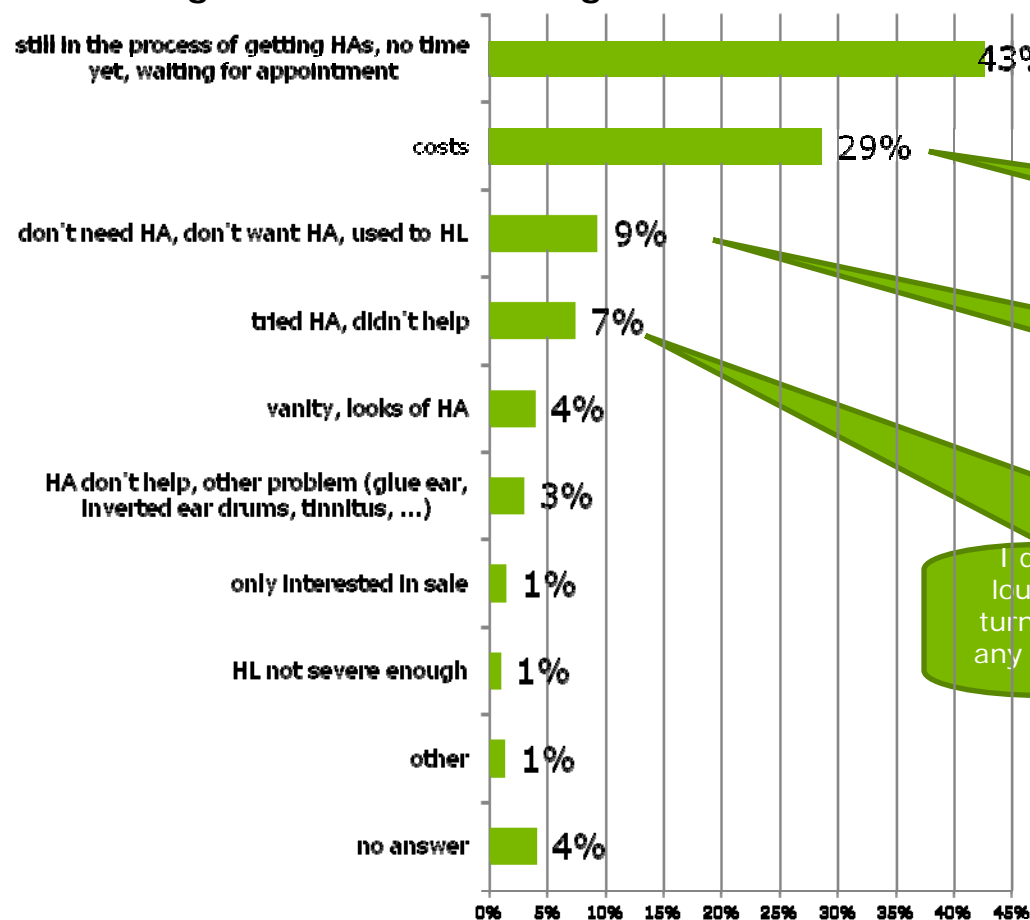
Impaired non-owner (Base: 155)



Non-owners: Reasons for not owning a HA

If Audiologist recommended to get HA (open ended question)

Audiologist recommended to get HA



For example:

Because I am awaiting an appointment to have a second opinion on my options available to me.

Cost is the main reason - waiting to see if I can get one on the National Health.

Didn't feel ready for one at the time.

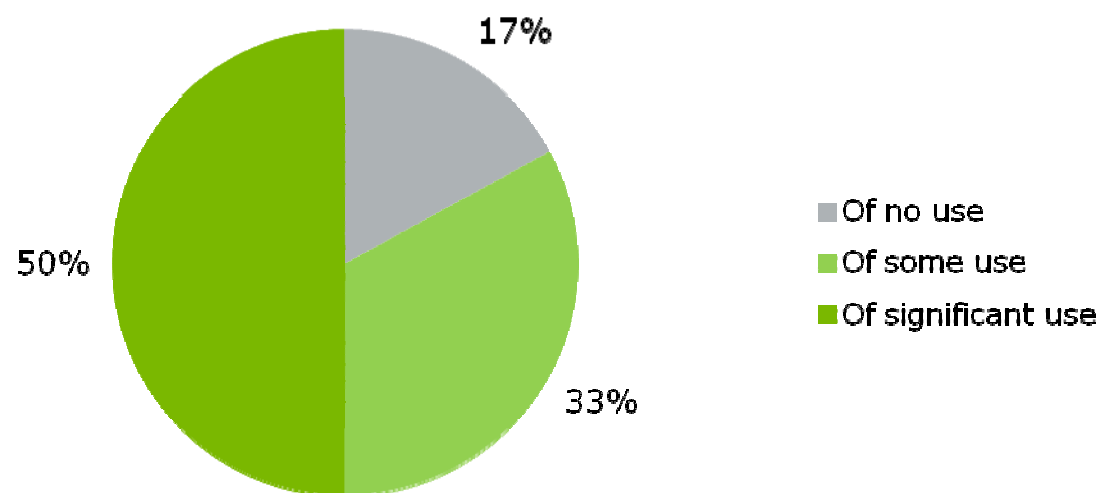
I did buy them. I couldn't tolerate them as loud sounds are very painful for me, I could turn down the volume, but then couldn't hear any better than without them, so I abandoned them.

Base: 56 (low sample size!)

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

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

How useful are your hearing aids on your job?

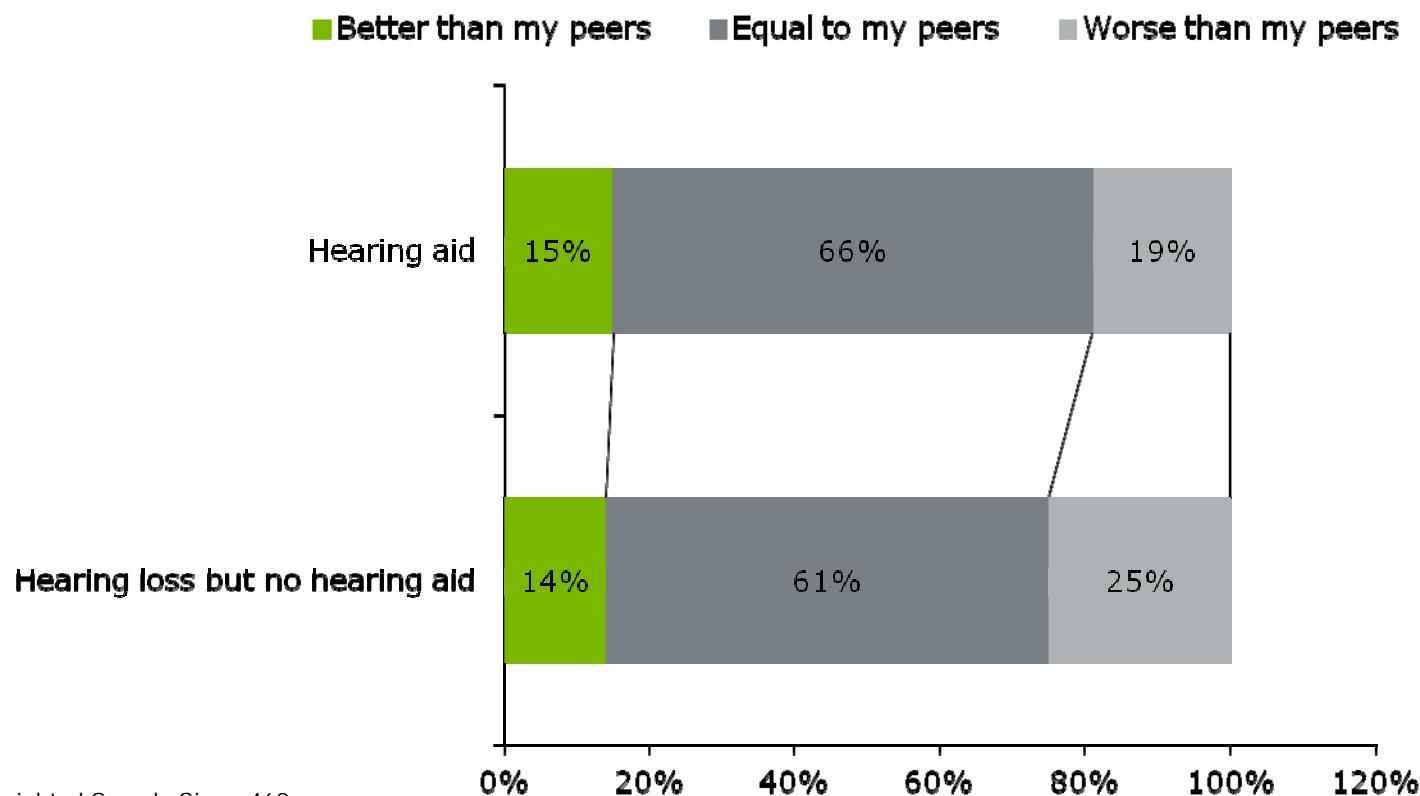


Base: N=144

Work competitiveness : 25% of impaired people without hearing aid tend to think they receive a worse compensation for their jobs than their peers (19% of hearing aid owners)

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

Base: Employed (full/part time)



Unweighted Sample Size = 468

Work competitiveness: People with hearing aid(s) tend to have a higher personal income compared to impaired non-owners. **This is particularly interesting because in UK the NHS provides hearing aid(s) for free.** (It's not only the rich that can afford hearing aids)

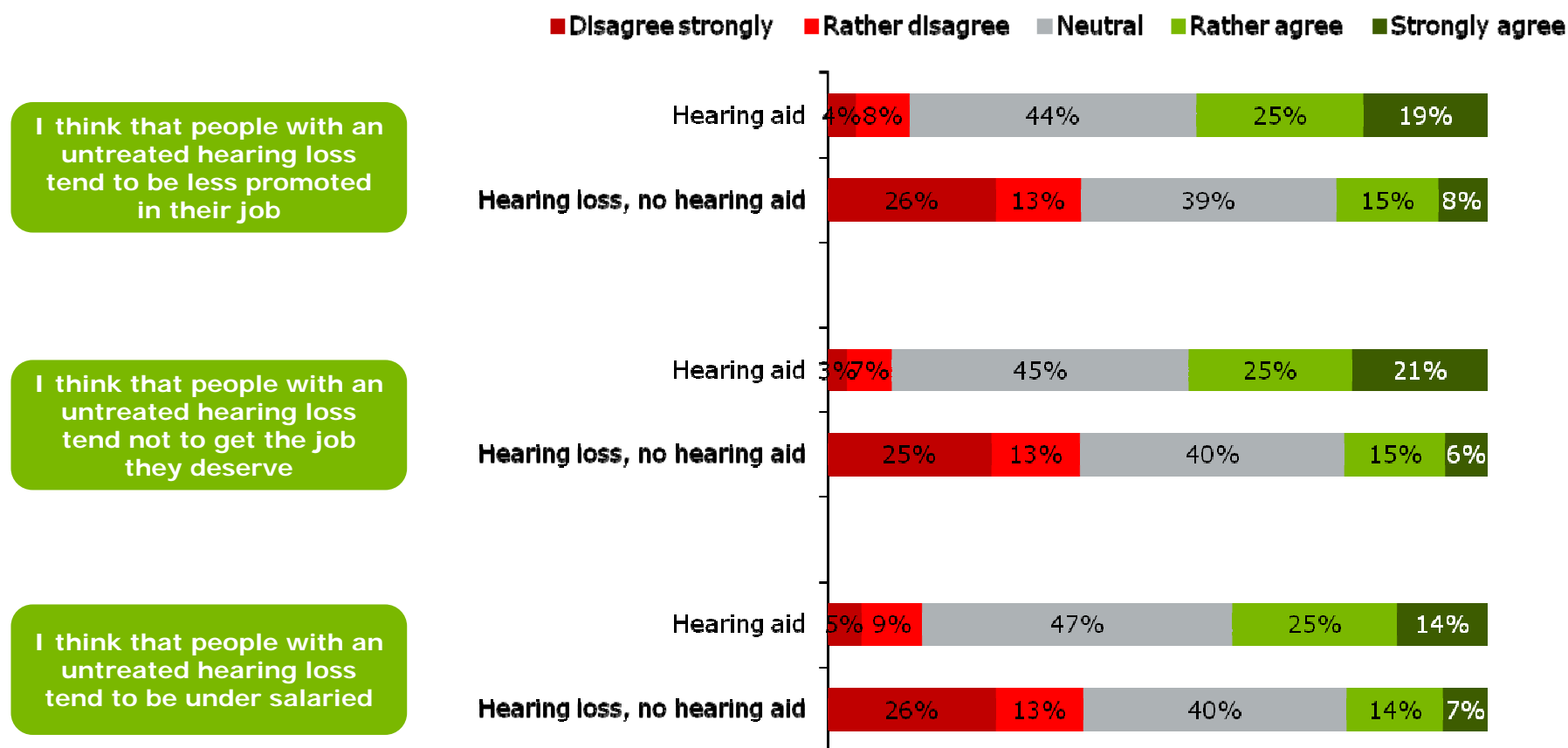
Personal income

Base: Employed (full/part time)



Unweighted Sample Size = 470

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



Base: Step2 : Hearing loss, no hearing aid =525/ hearing aid n=328

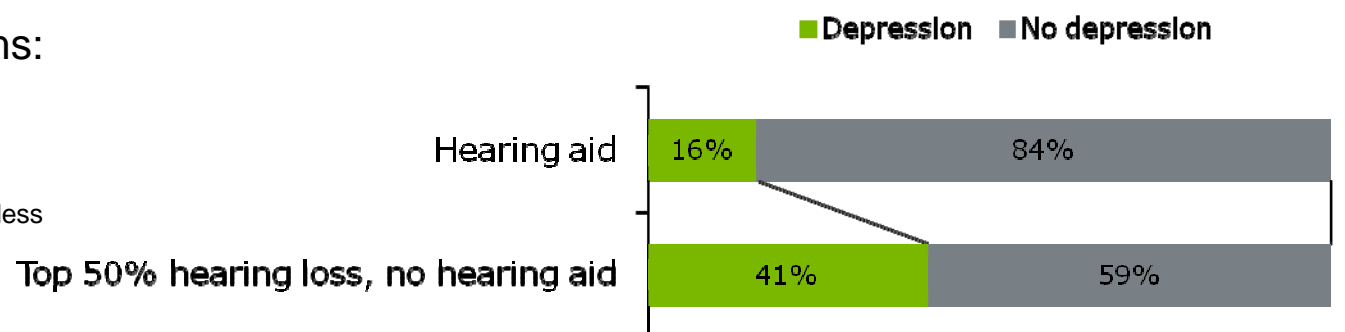
Health problems: Hearing aid owners have a much lower risk of being depressed (PHQ-2 Screening) and a lower risk of being forgetful compared to impaired non-owners with comparable hearing loss
(Top50% hearing loss group*)

Depression symptoms:

PHQ-2 Screening:

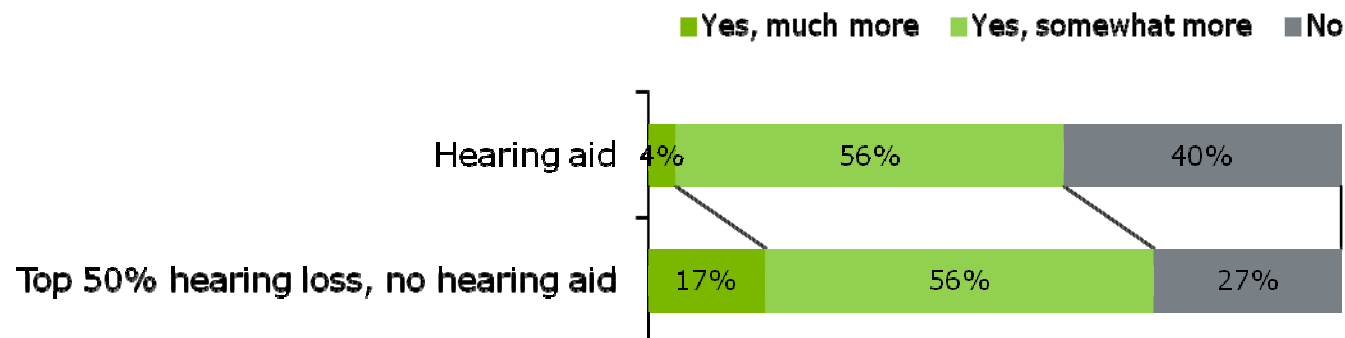
In the last 2 weeks:

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



Dementia symptom:

Getting more forgetful in
the last year?



Base: hearing aid n=306 / no hearing aid =118

*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:

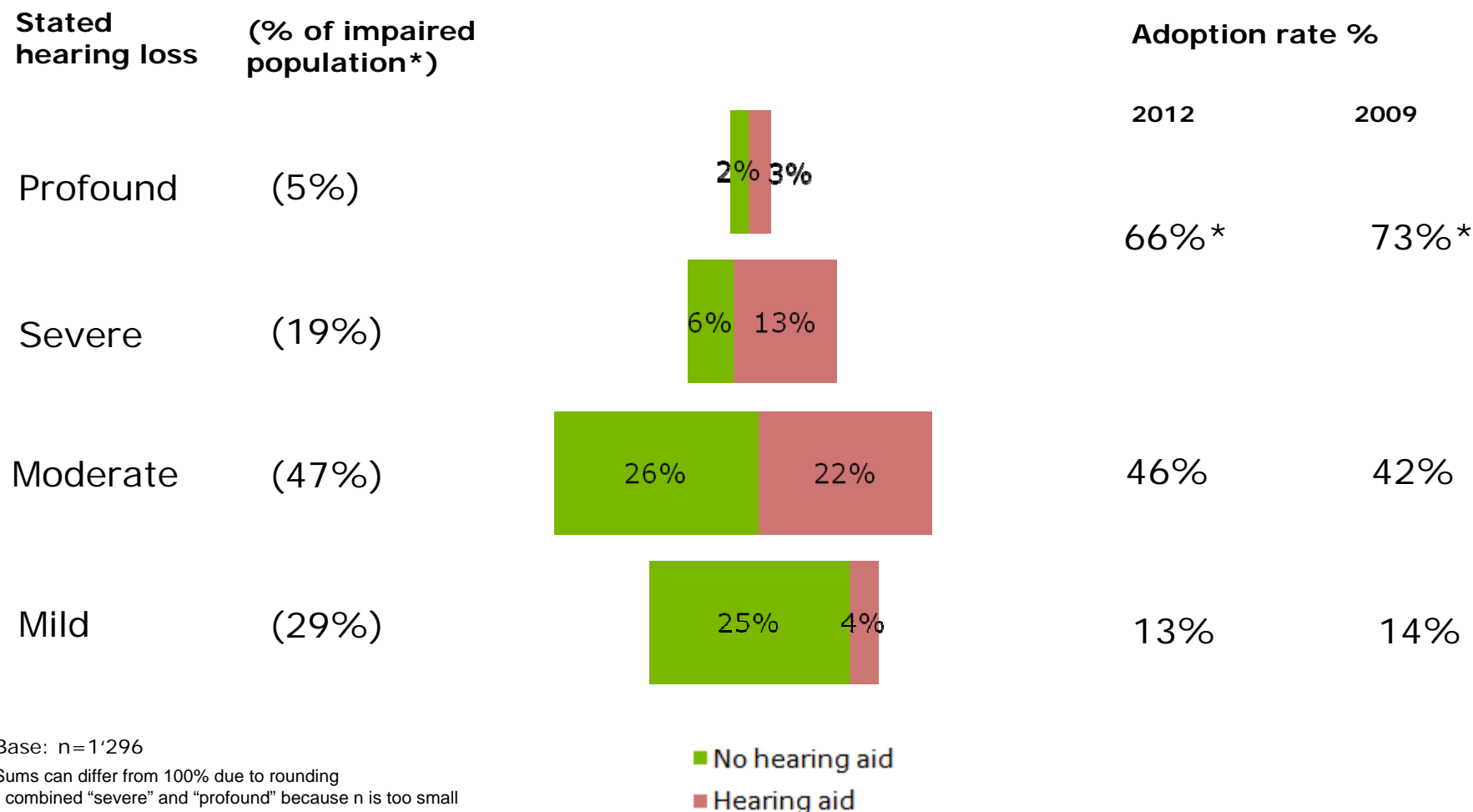
- Number of ears impaired (one or two)
 - Stated hearing loss (Mild to Profound)
 - Scores on 6 APHAB-EC – like questions (Scaled 1-5)
 - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67%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

3. Analysis of hearing aid owners

Hearing aid ownership, lifetime and usage

Not in
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Low adoption rates within mild and moder hearing loss



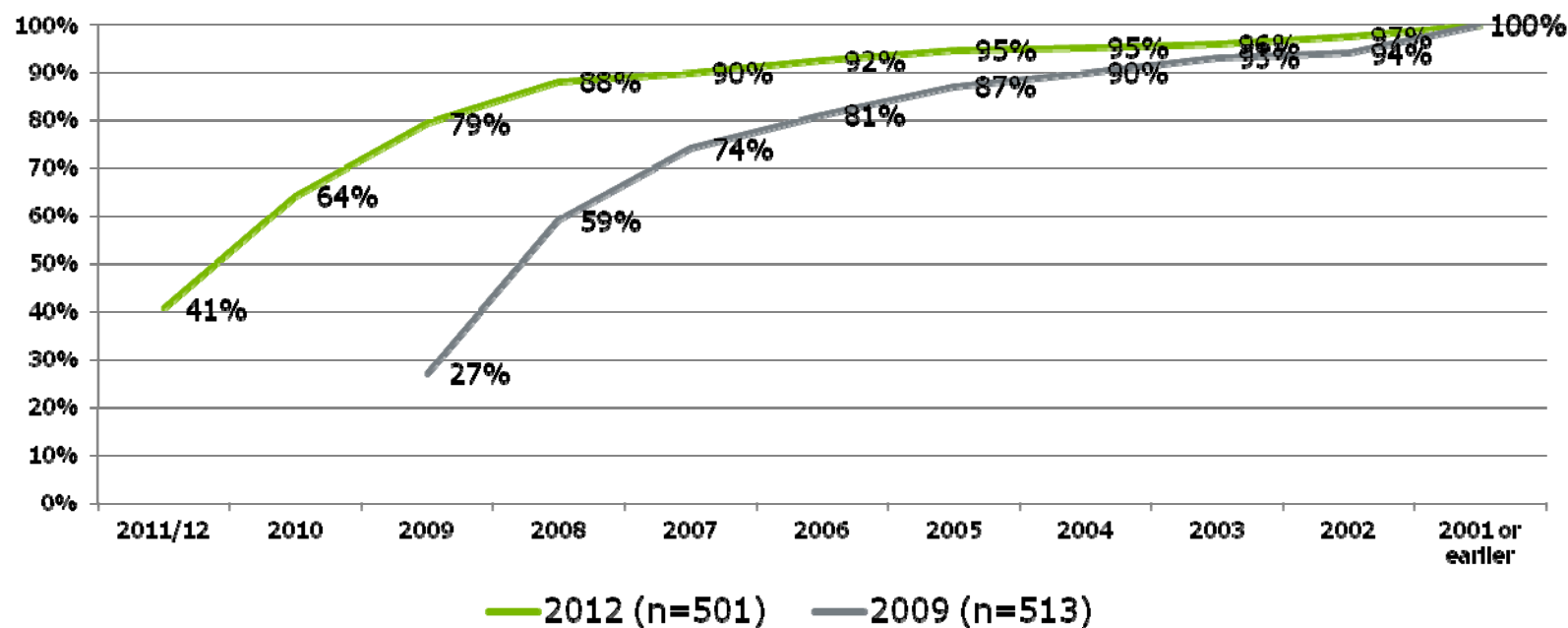
Base: n=1'296

Sums can differ from 100% due to rounding

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

79% of the currently owned HAs were fitted in 2009 or later

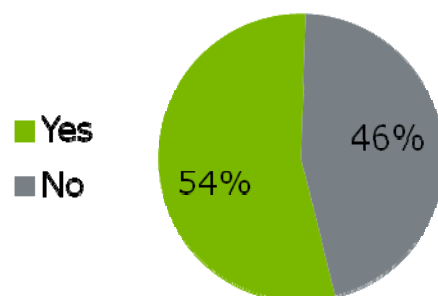
Year of purchase



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

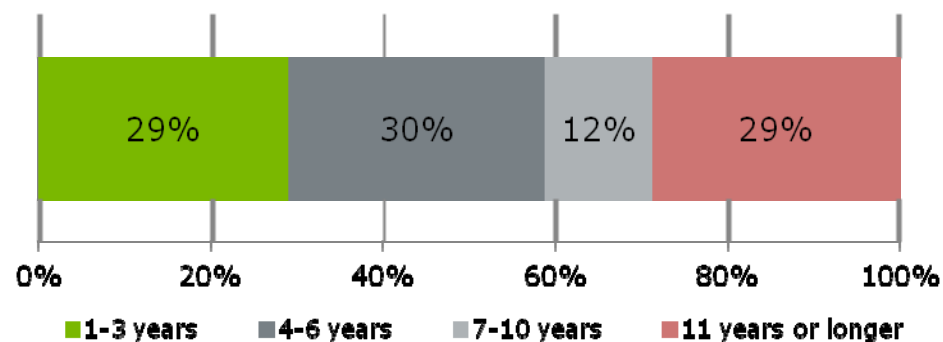
Lifetime: Non first time users kept their HAs for 5 years on average

Current HAs = first HAs?



Base: n=501

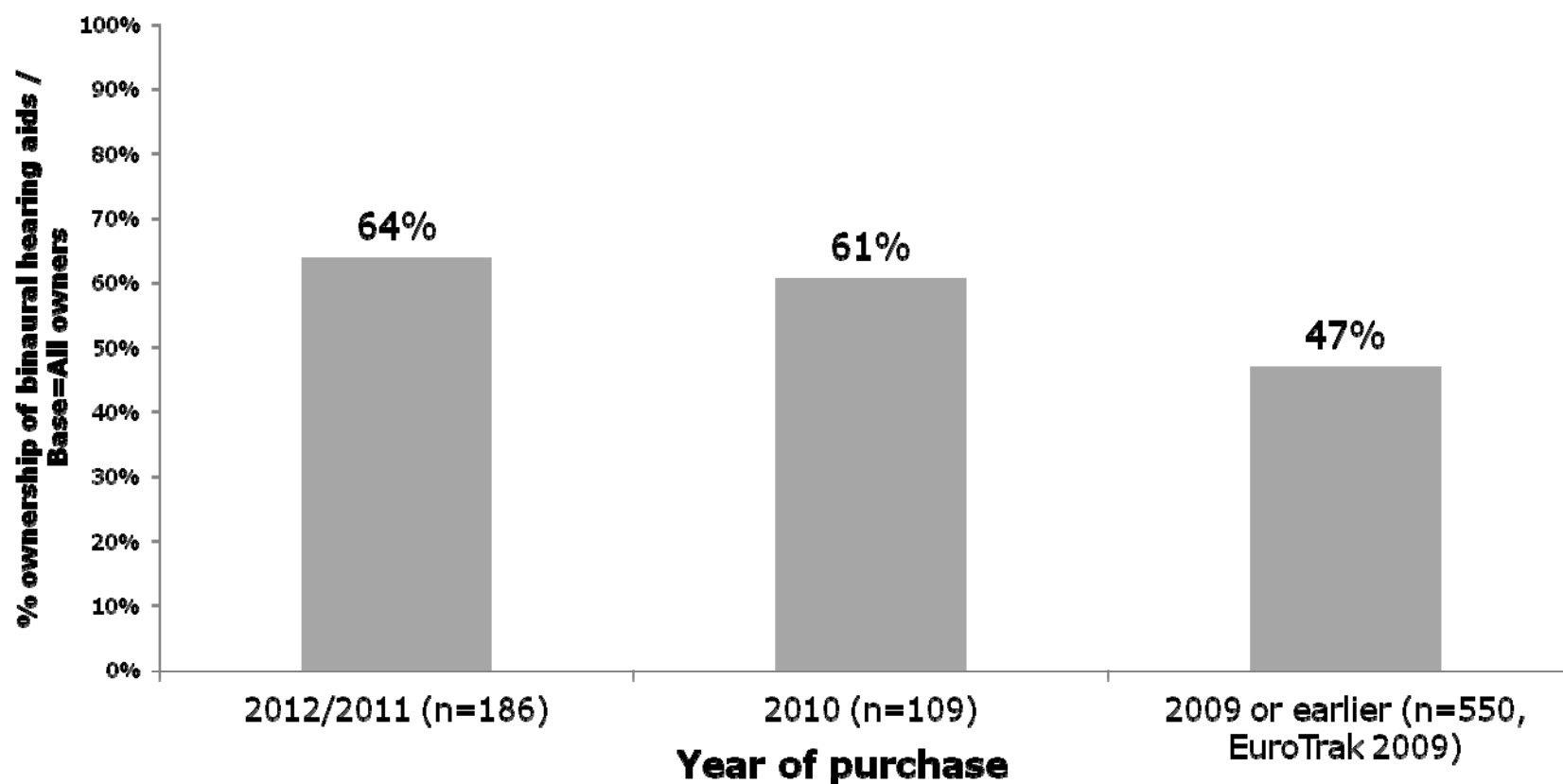
How many years did you own your previous HAs?



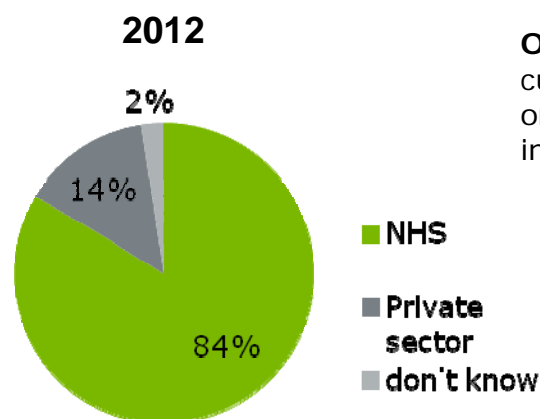
Base: n=175

Age of HA before it has been replaced:
2012: 5 years (median)

Monaural-binaural treatment by purchase date

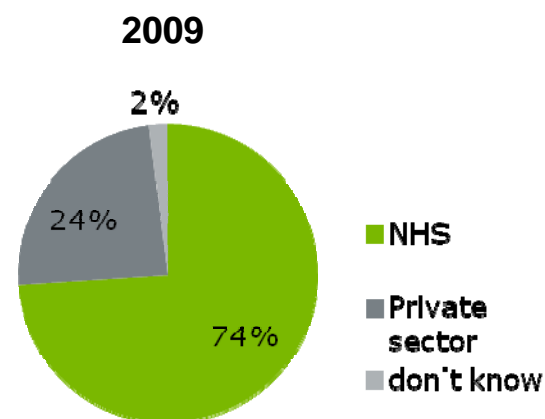


The share of owners having received a free-of-charge NHS instrument has risen from 74% to 84%. Information deficit non-owners: only 24% know whether insurance would pay

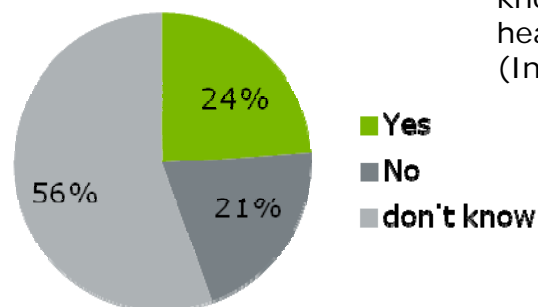


HA-owner, n=501

Owners: Did you purchase your most current hearing aid in the private sector or did you receive a free-of-charge NHS instrument?

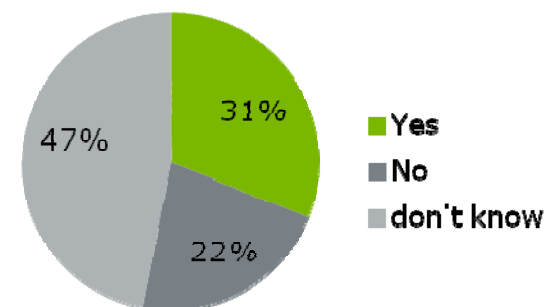


HA-owner, n=513



HA-non-owners, n=795

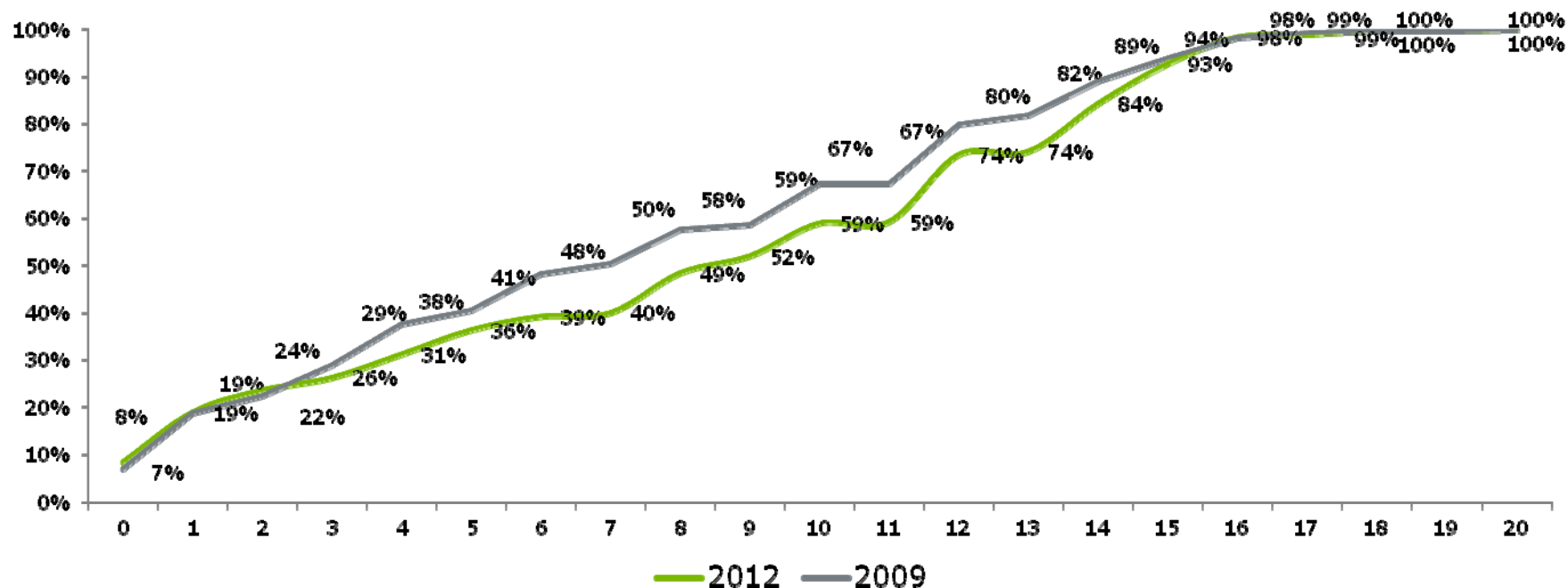
Non-owners: Based on your current knowledge, would any part or all of your hearing aid(s) be paid for by a third party? (Insurance, NHS)



HA-non-owners, n=822

On average, HAs are worn 8.3 hours a day

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

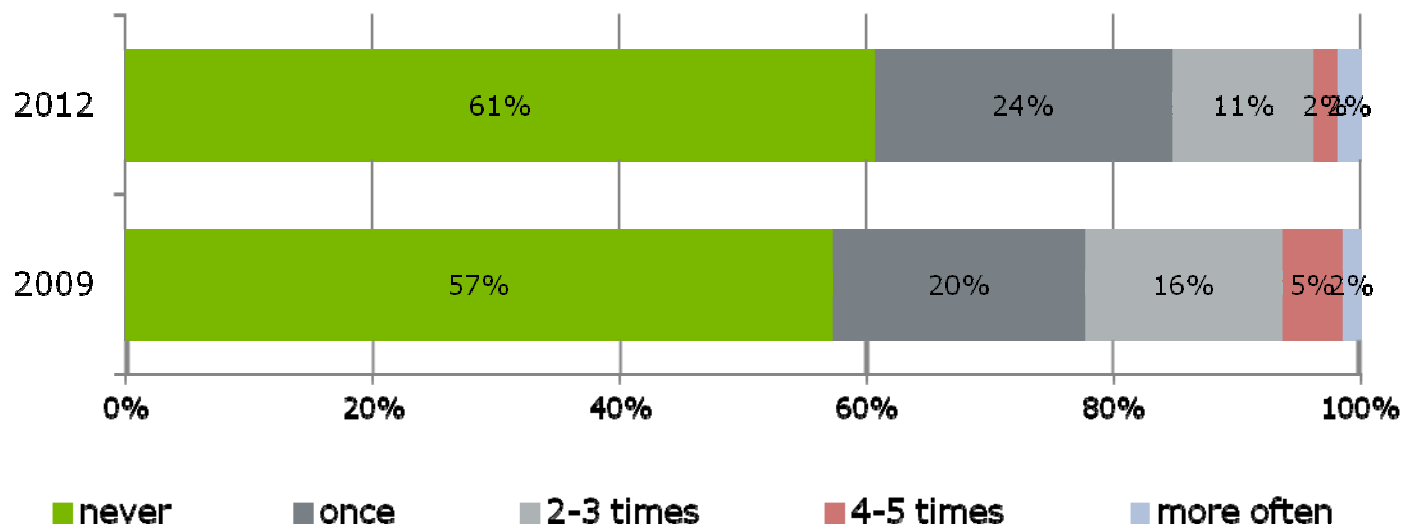


HA worn:
2012 Mean: 8.3 hours/day
2009: Mean: 7.5 hours/day

HA-owner:
2012: n=501
2009: n=513

85% 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?

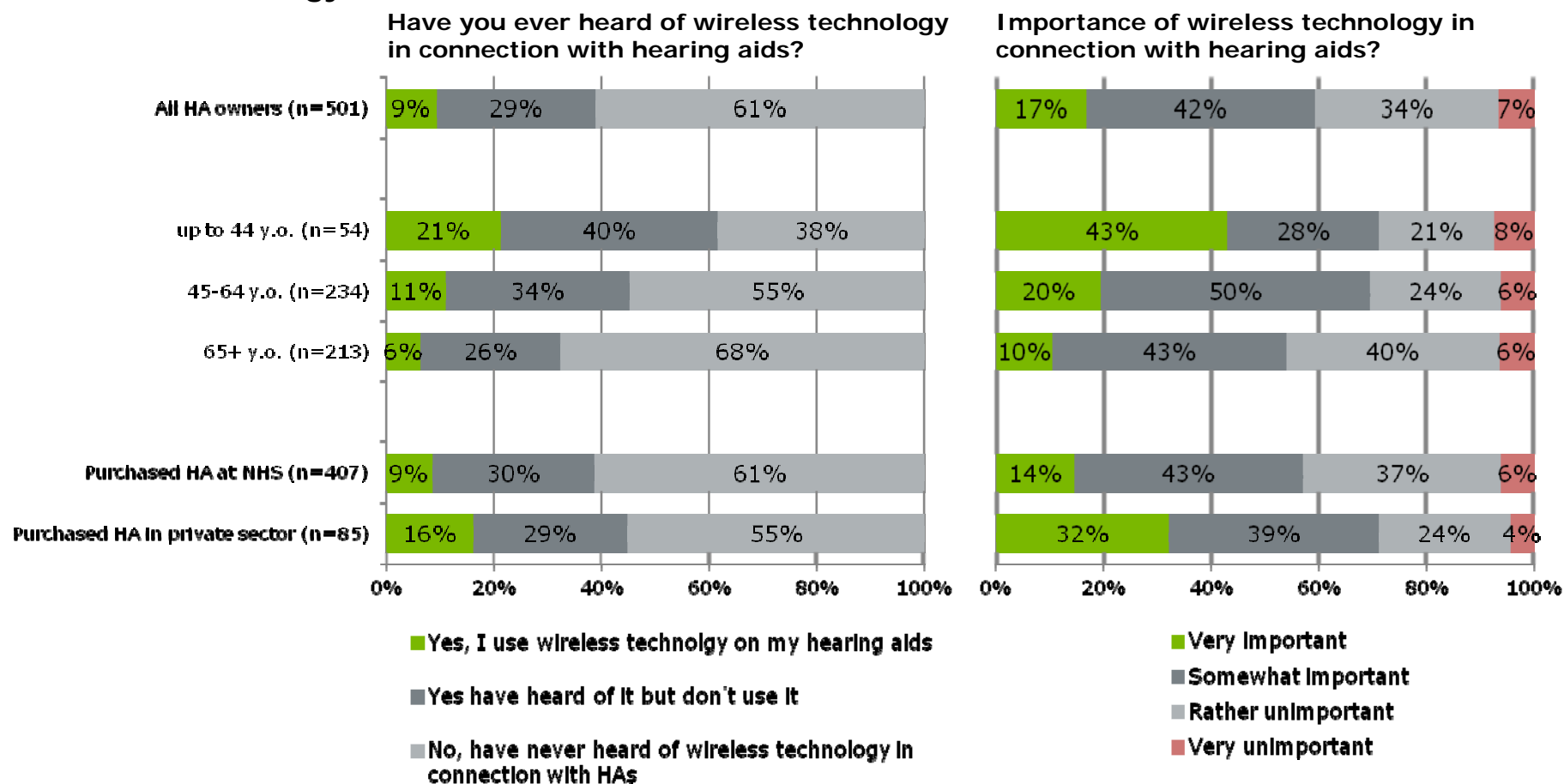


HA-owner:
2012: n=501
2009: n=513

Awareness and importance of wireless technology

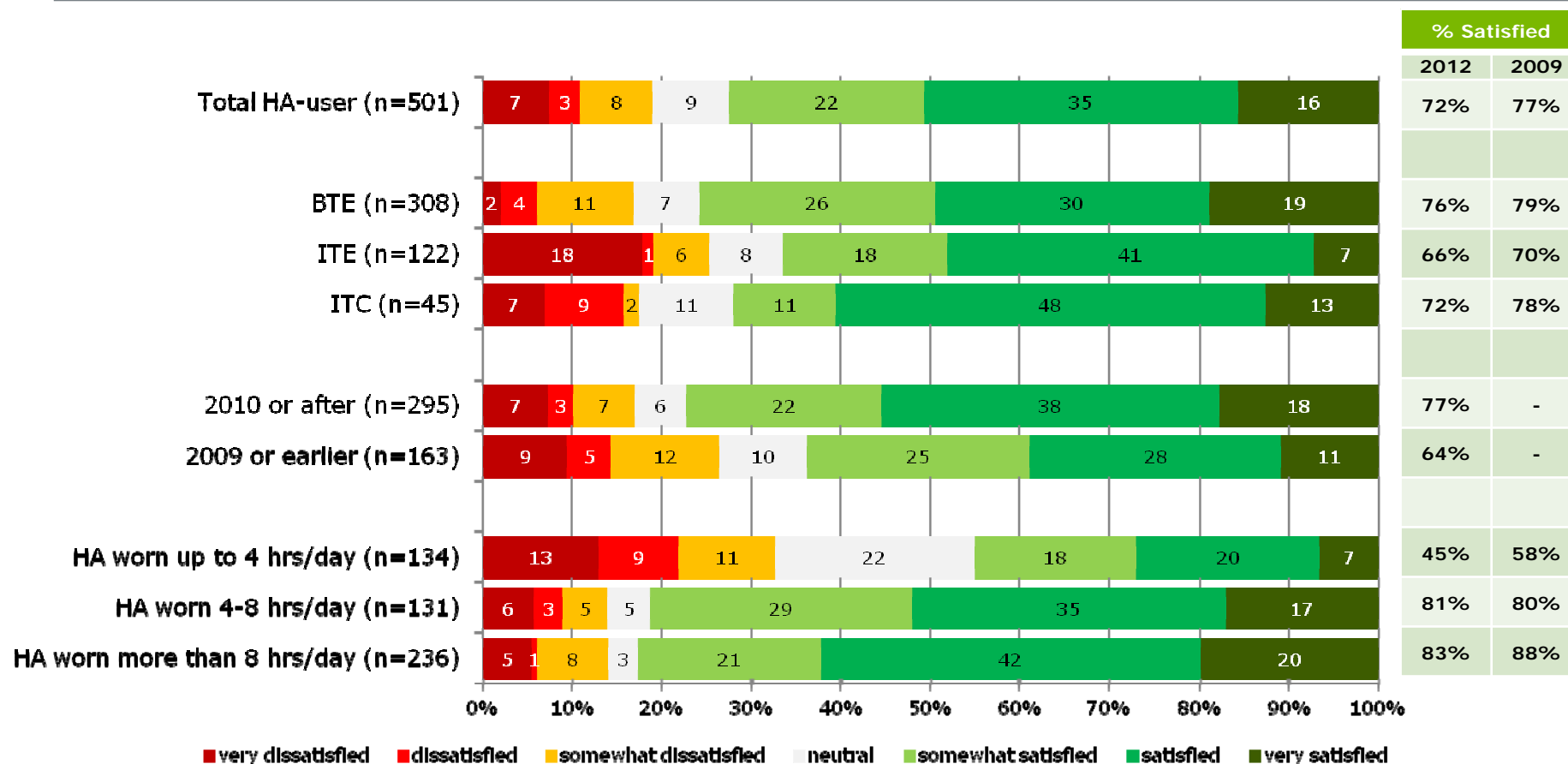
Younger HA owners use wireless technology with their HAs more often and it's more important to them

Wireless Technology



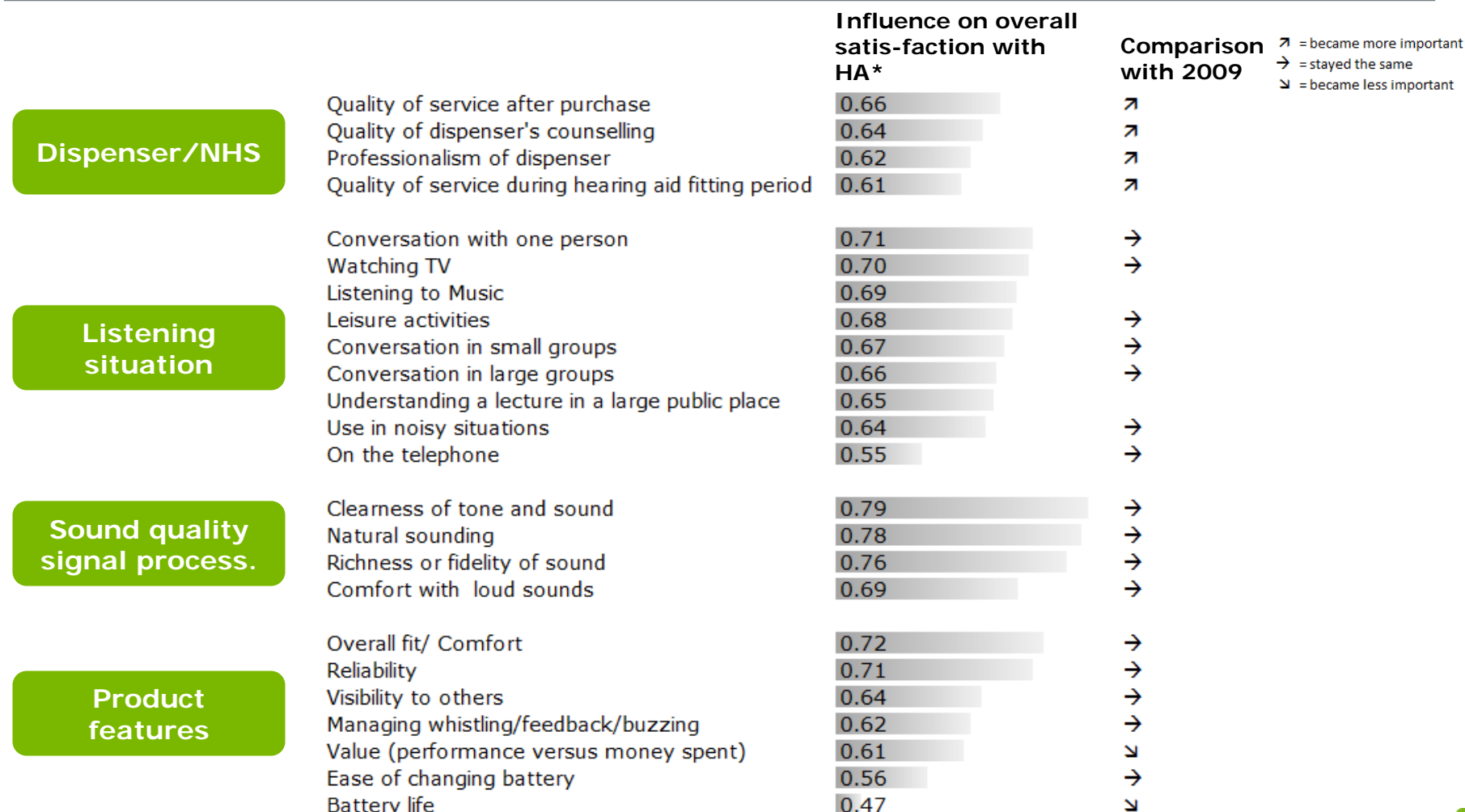
Satisfaction with HA and drivers

Overall satisfaction with HA is highest among users who wear them more than 8 hrs/day, bought them in 2010 or after and have BTEs

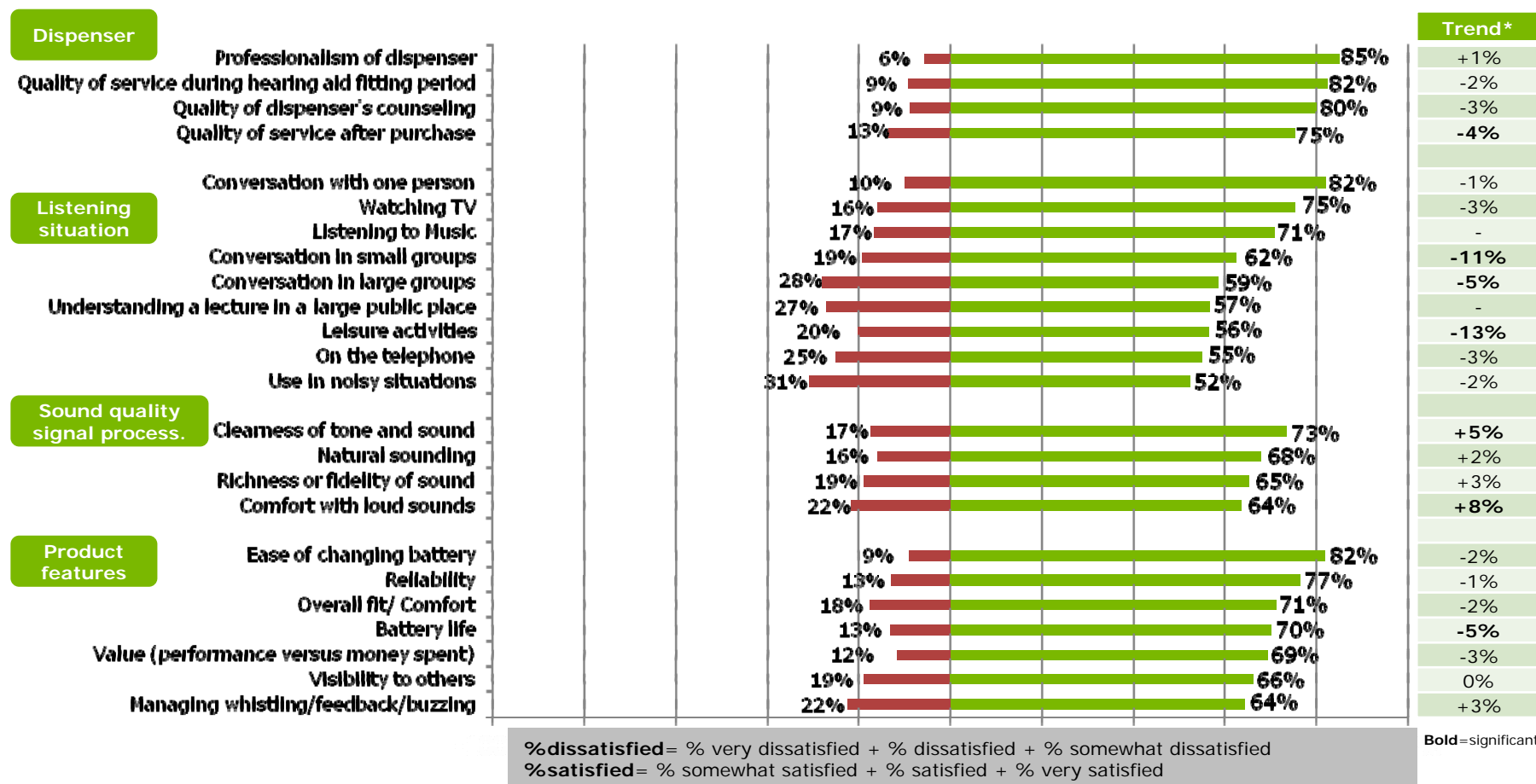


Not in
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Factors influencing satisfaction with current HA: \$ quality/signal processing is most important for overall satisfaction with HA



Satisfaction with current HA



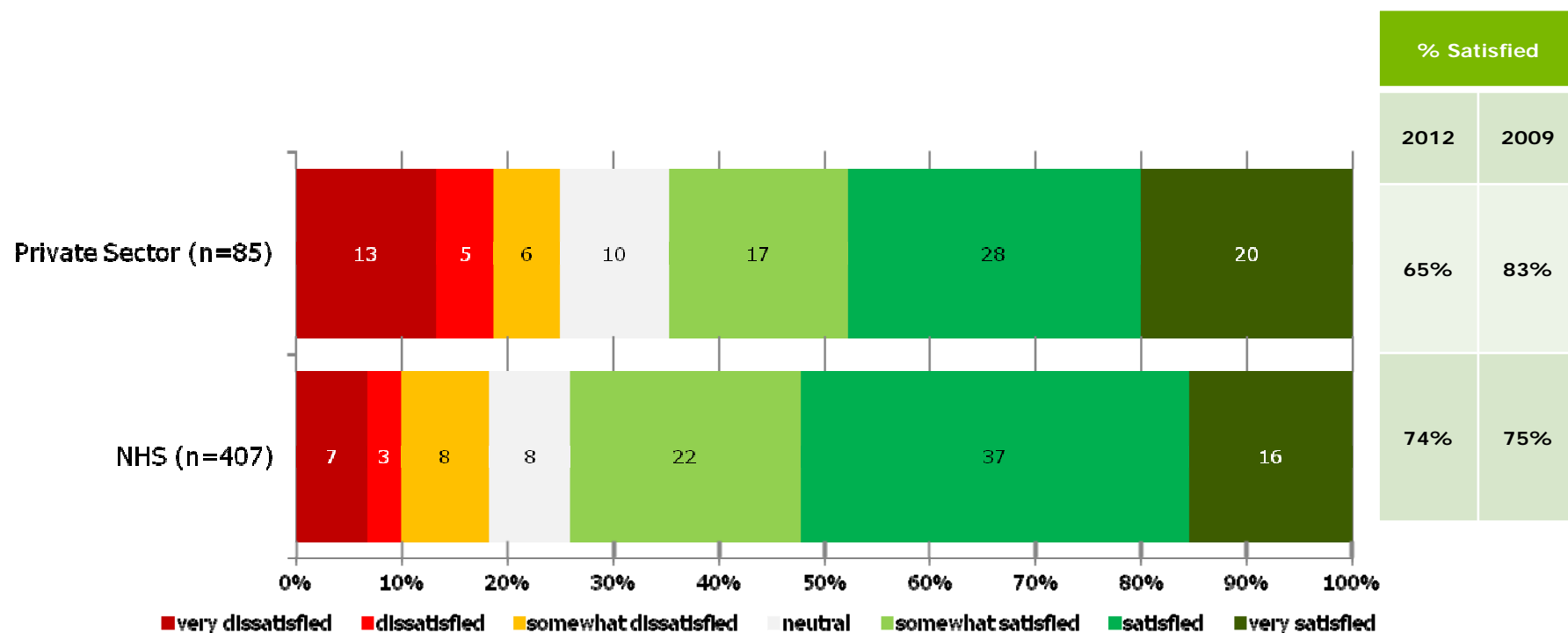
* % of satisfied HA owners compared to EuroTrak 2009

■ dissatisfied ■ satisfied

HA-owner, n=501

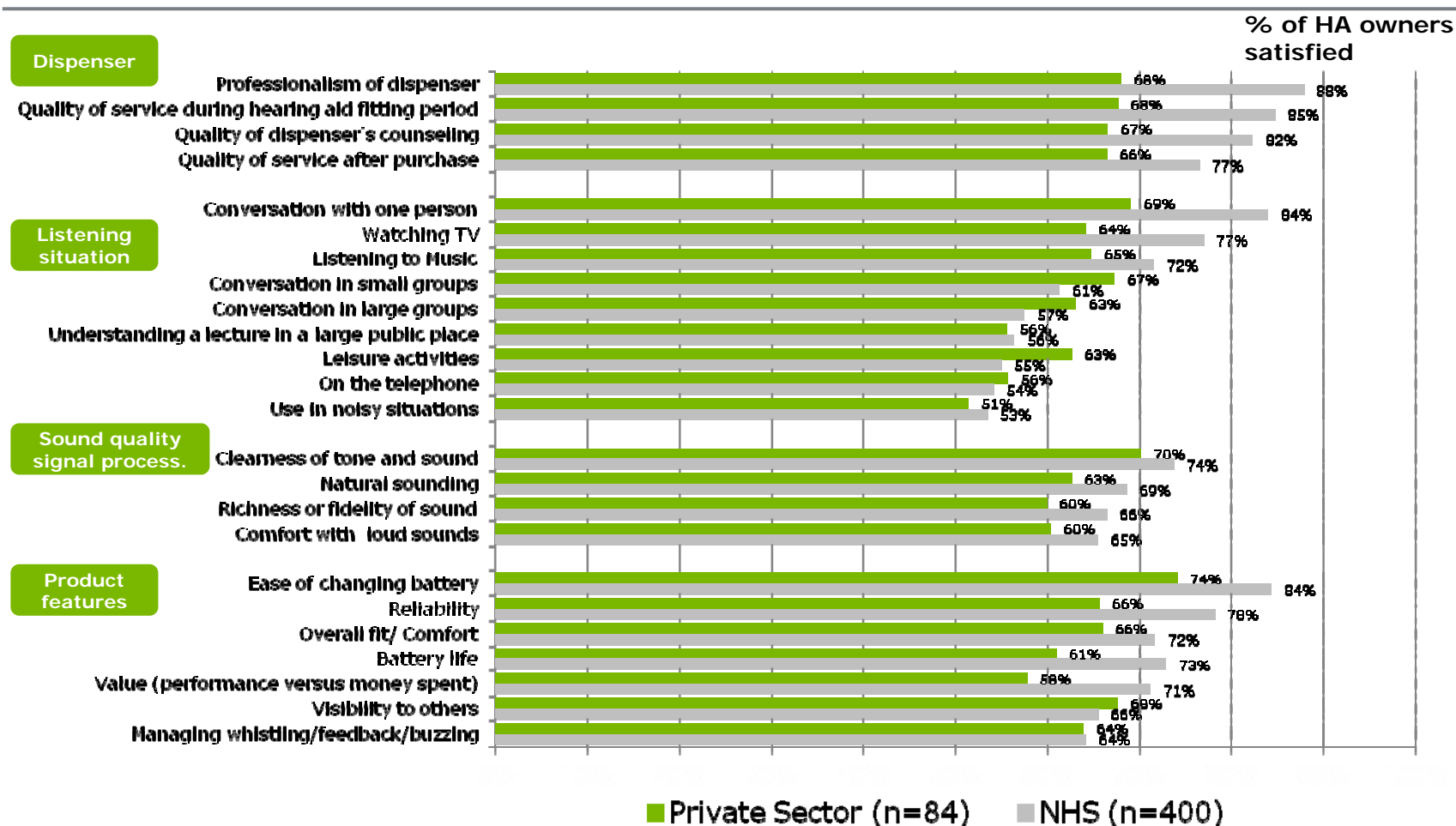
Not in
present
ation?

Satisfaction with HAs bought in the Private Sector has decreased since EuroTrak 2009, while NHS devices remained on the same satisfaction level



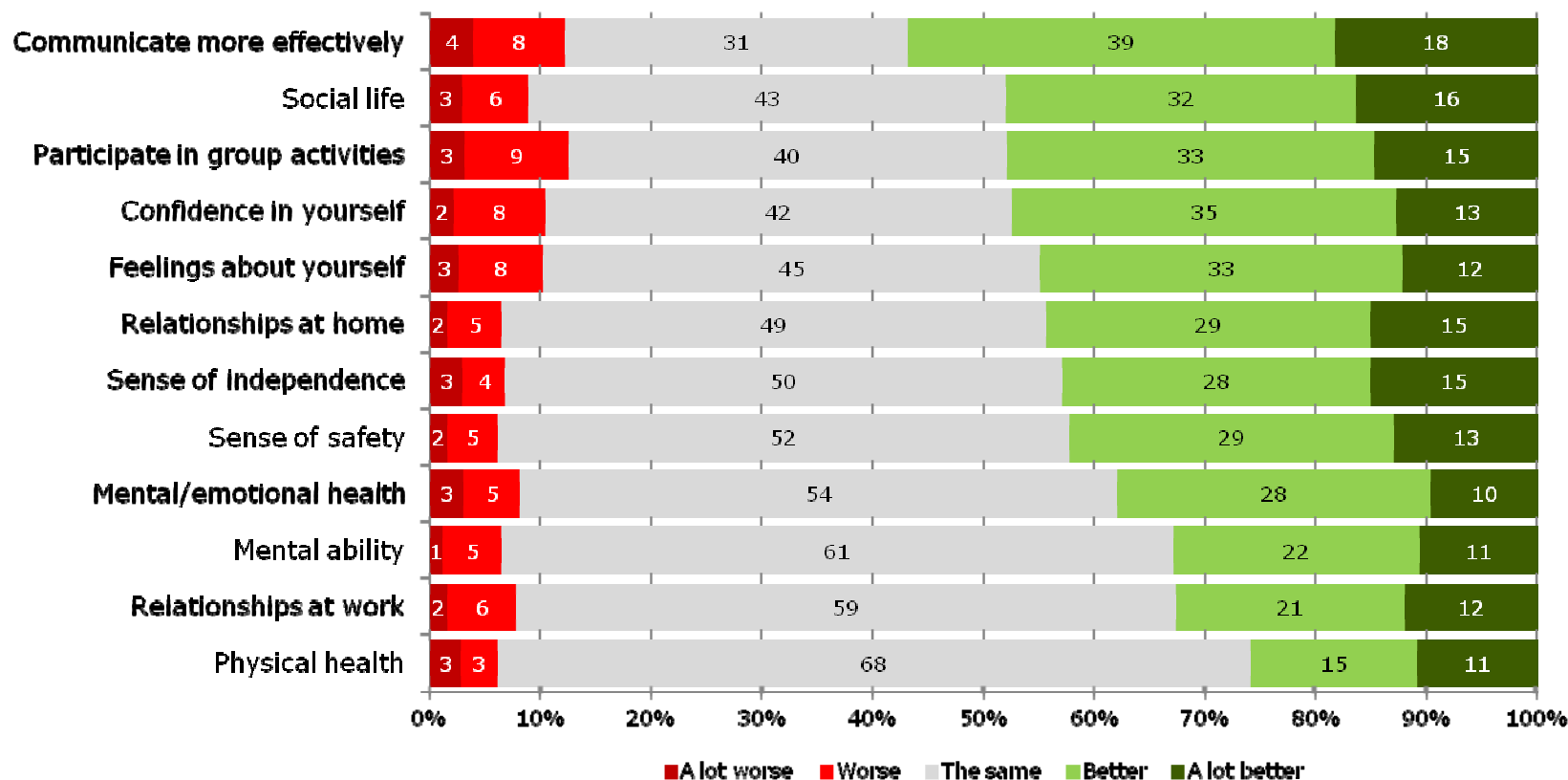
NHS clients are more satisfied with the dispenser compared to the private sector

Not in
presentation?



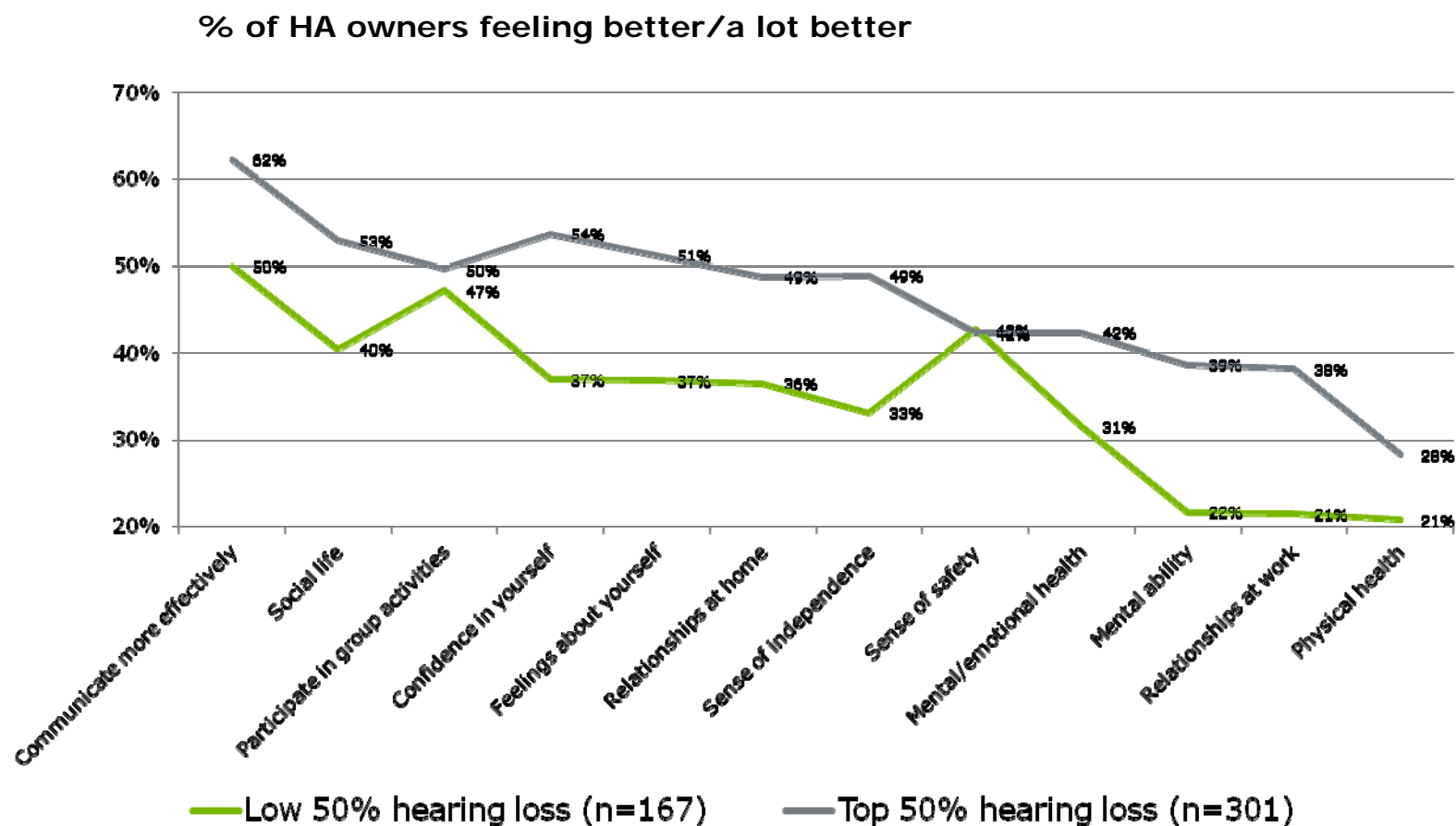
Positive impact of HAs

Significant positive impact of HAs on different aspects – especially communication effectiveness and social life



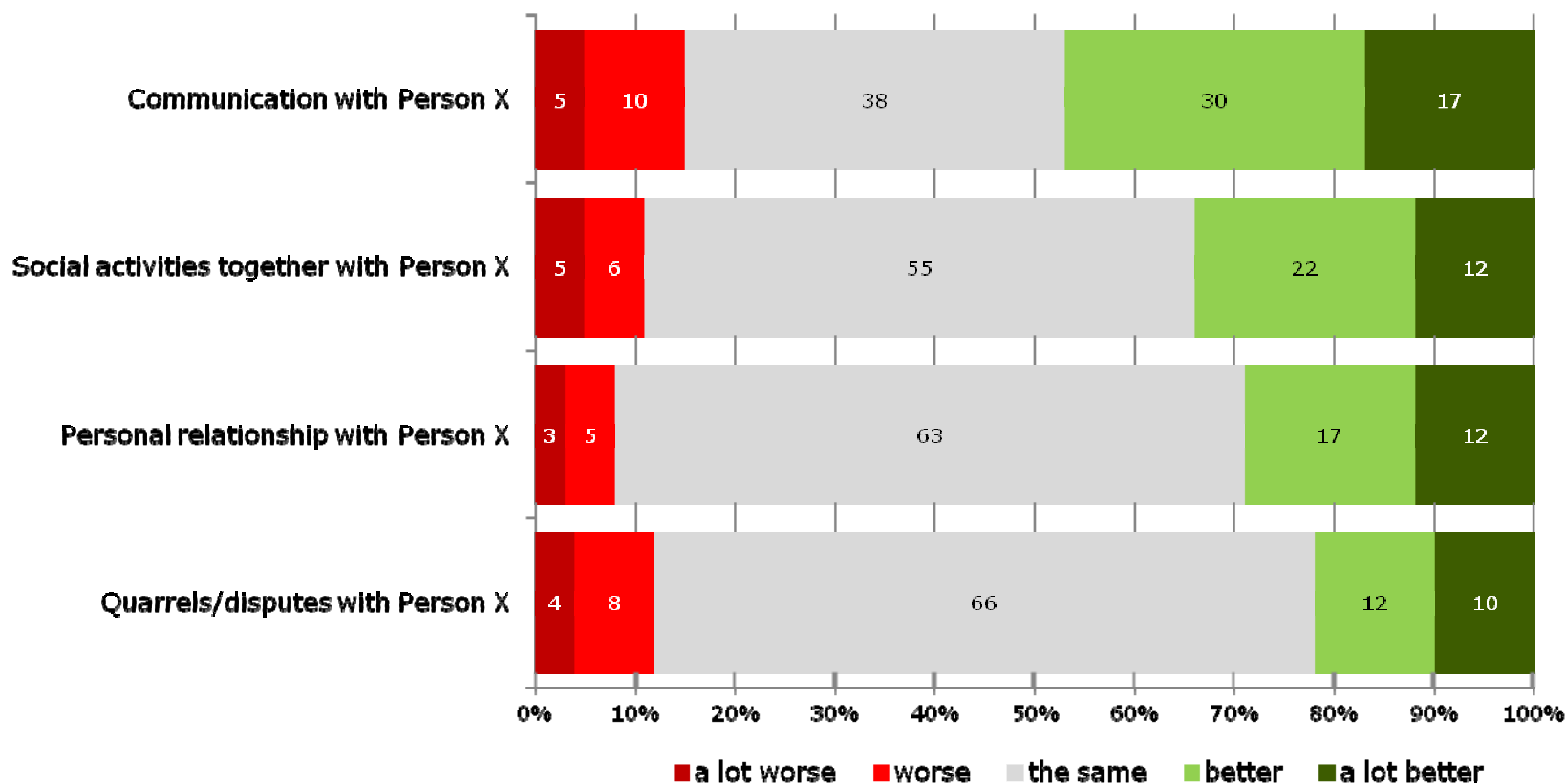
HA-owner, n=501

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



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

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



Someone in HH / parent have HA, n=491

4. Analysis of hearing impaired non-owners

Reasons for not having a hearing aid

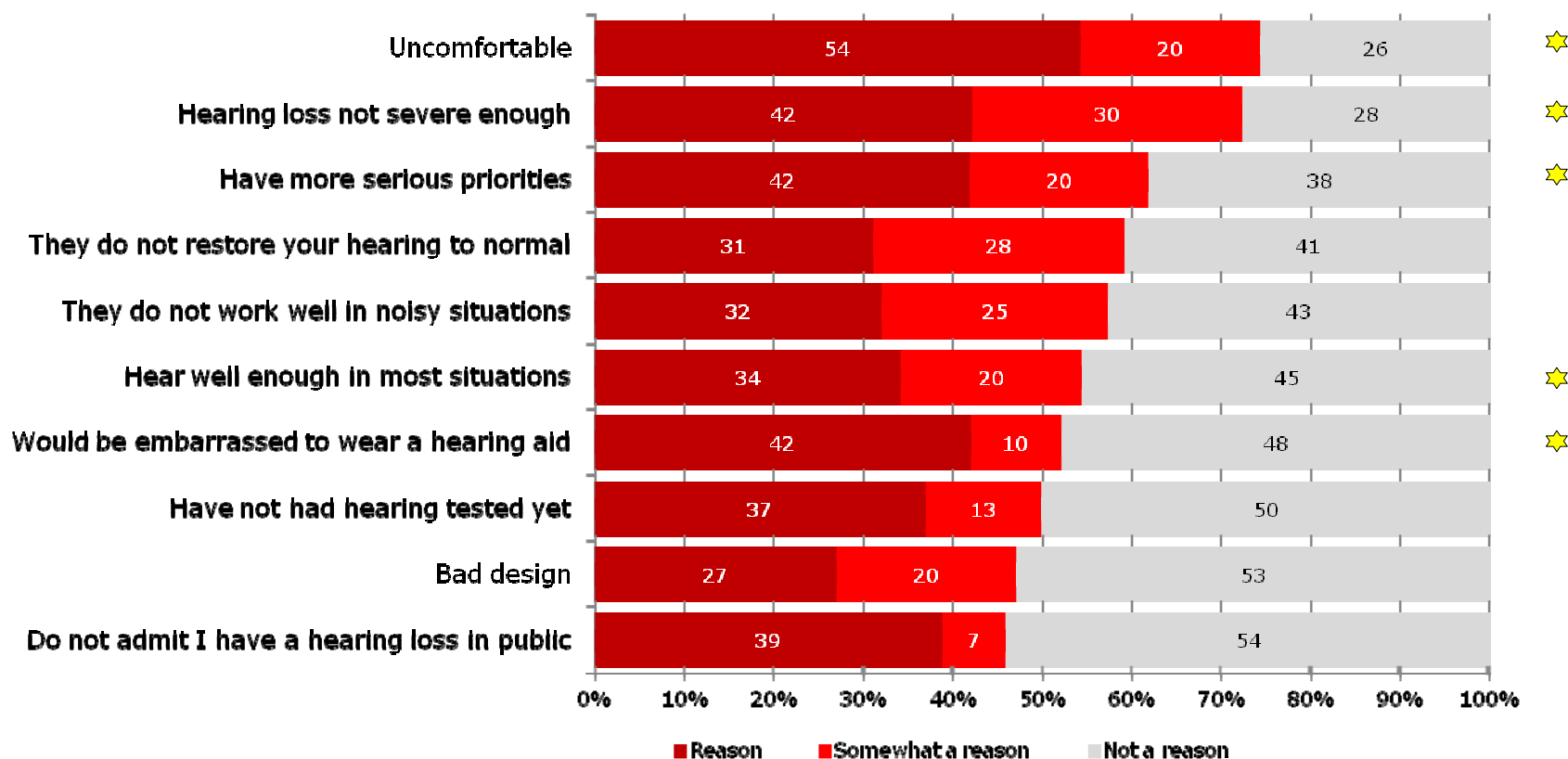
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To analyse reasons of non-adoption we look at the Top 50% group, as the structure of hearing loss is more similar to the HA owners

Hearing loss characteristics: Owners compared to non-owners

	% HA Owner (n=501)	%HA-Non- owner Low 50% HL	%HA-Non- owner Top 50% HL
Ears impaired			
Unilateral loss	24%	51%	29%
Bilateral loss	76%	49%	71%
Perceived loss		More similar hearing loss- structure	
Mild	9%	44%	14%
Moderate	53%	47%	58%
Severe	32%	7%	19%
Profound	6%	2%	8%

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

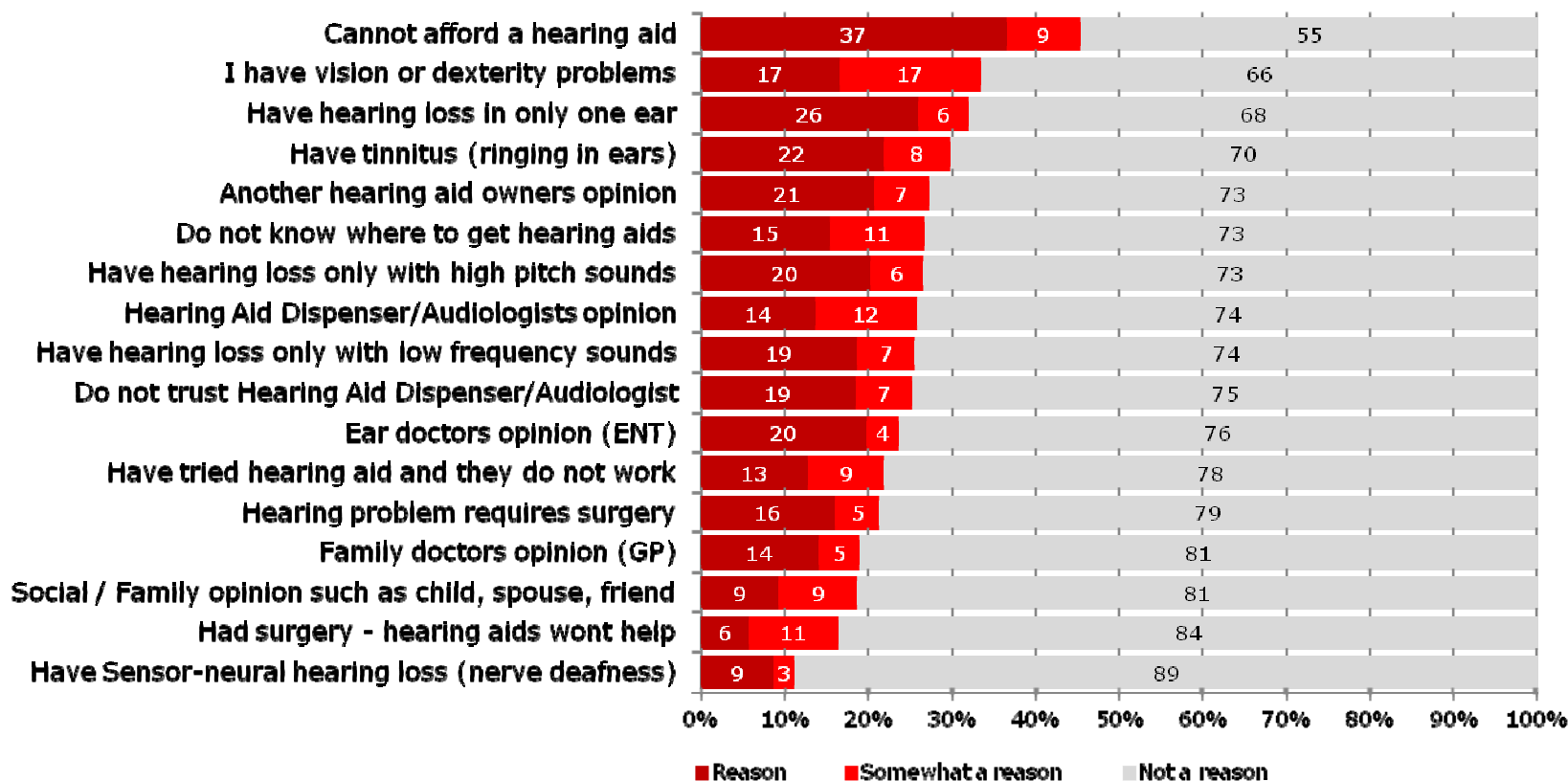


★ = Top 5 reasons EuroTrak 2009

Base: non owners Top 50% HL: n=191

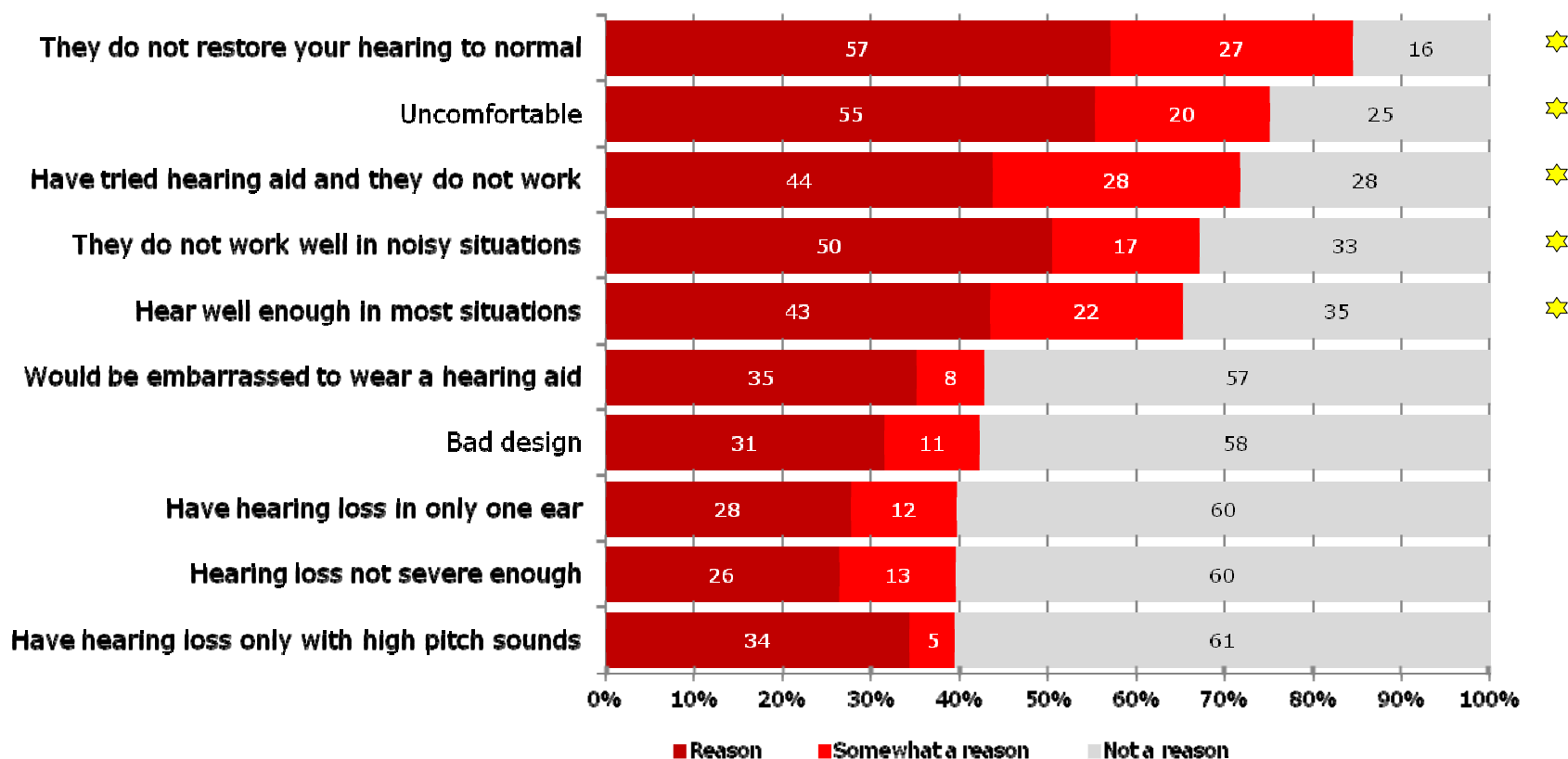
Less important reasons for not having a hearing aid (II/II)

Not in
present
ation



Base: non owners Top 50% HL: n=191

Top 10 reasons for HA owners NOT using them

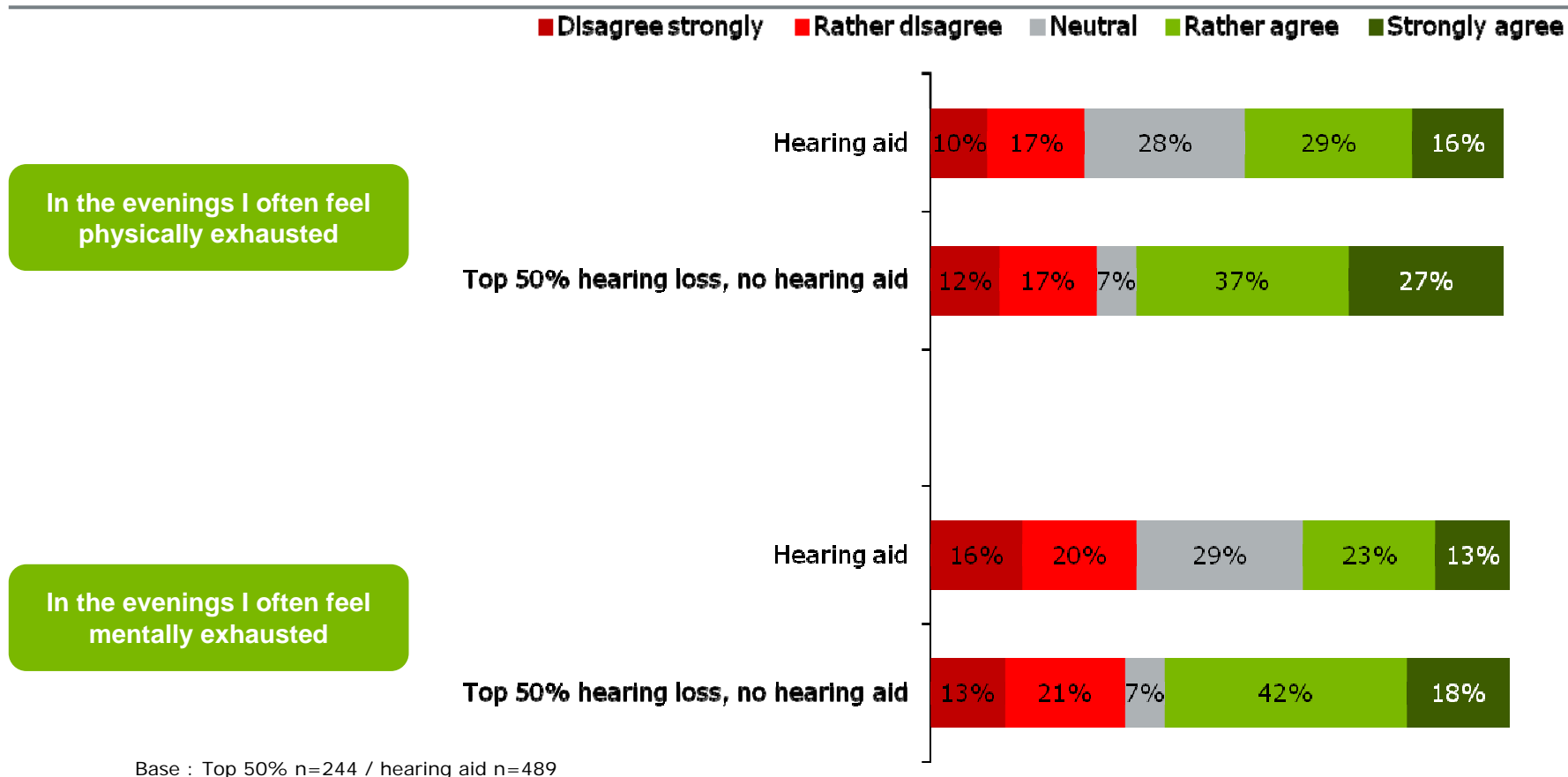


★ = Top 5 reasons EuroTrak 2009

Owners who don't use, n=47

Negative impact of hearing loss

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



*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

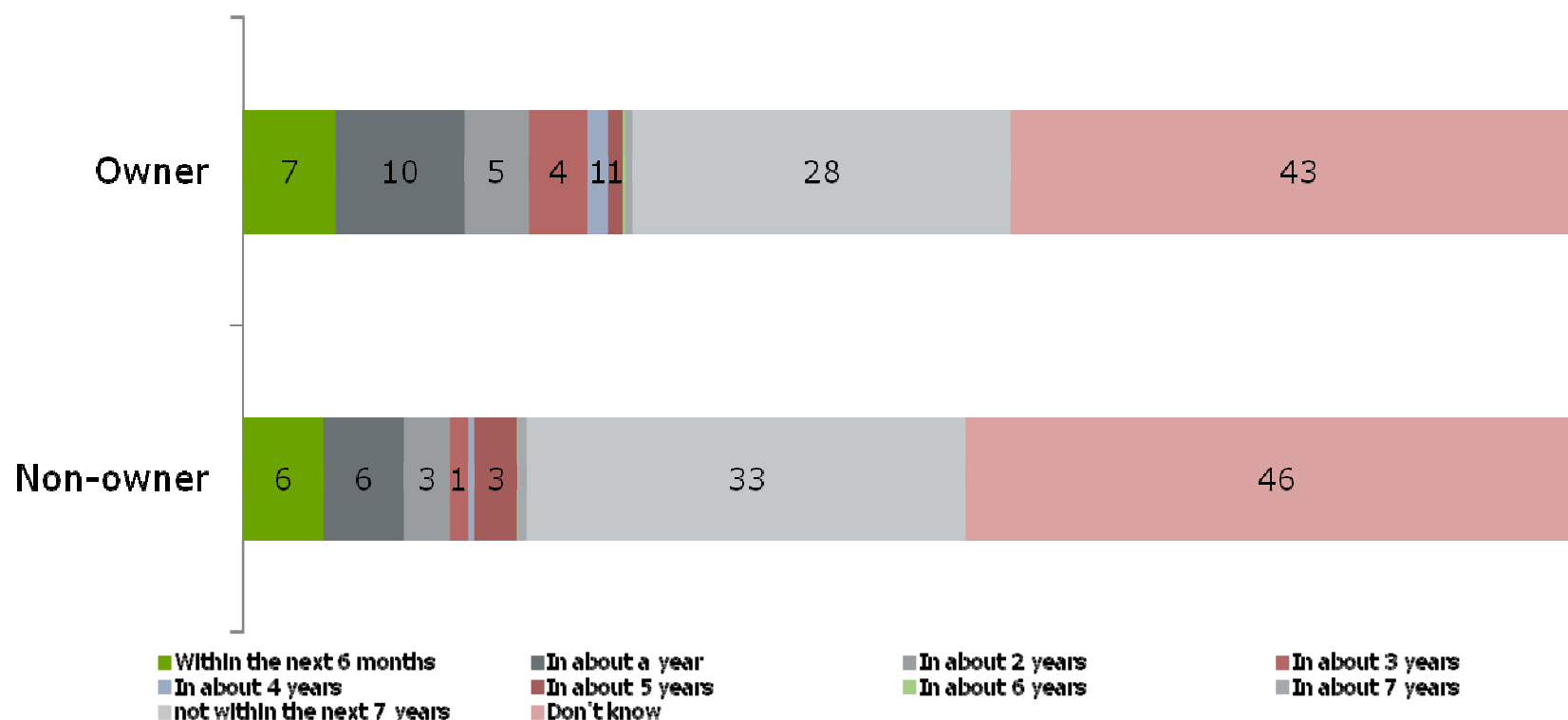
→ People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).

Buying intentions



12% 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 %



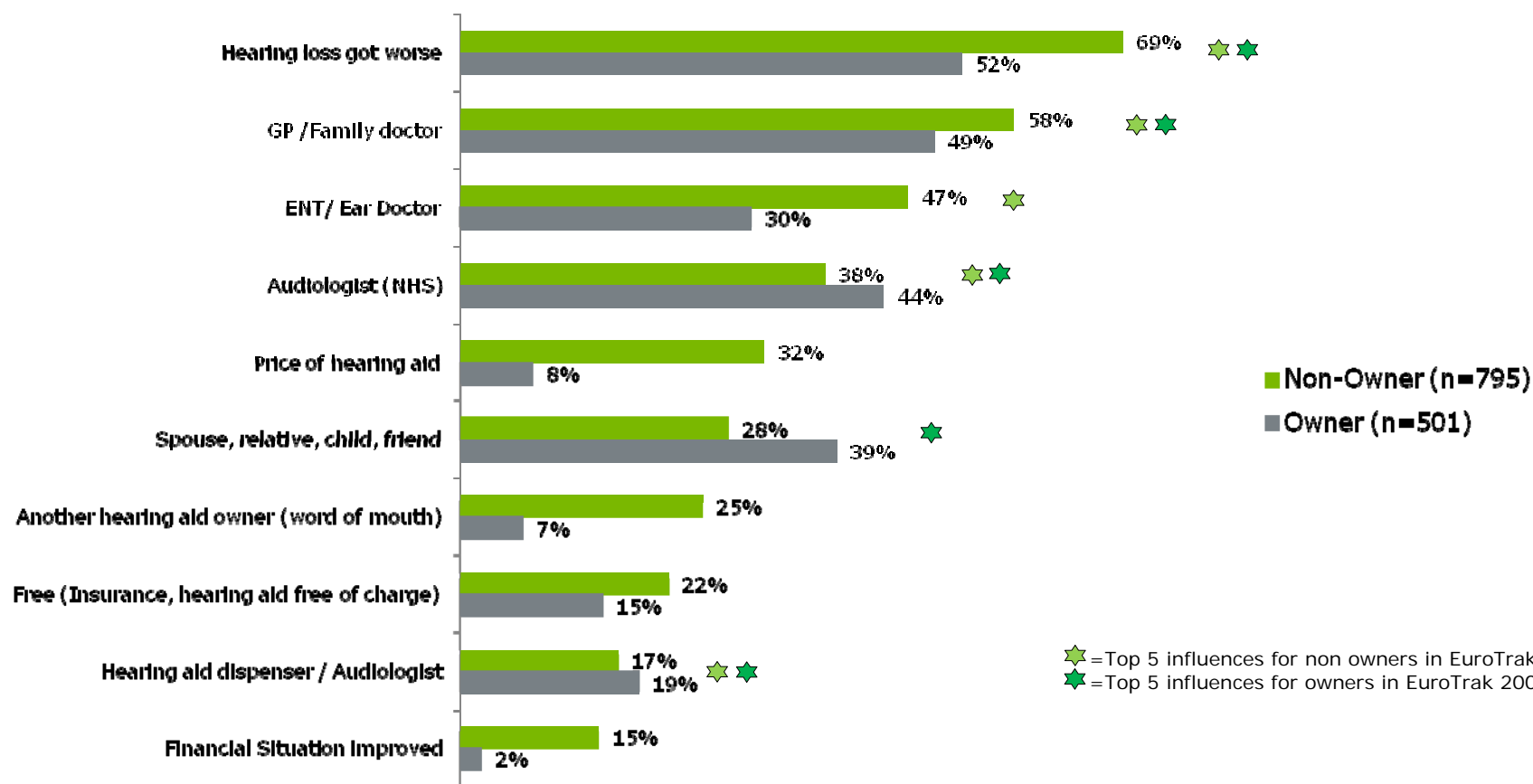
HA-non-owner, n=795
HA-owner, n=501



The most important influencing factors are worsening hearing, GP, ENT and NHS audiologist. Non-NHS audiologists became less important compared to 2009

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

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





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APPENDIX

Demographics (1) Hearing instrument adoption rates and populations

Profiles: Categories add to 100%*

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)		No hearing loss	Hearing loss but no hearing aid	Hearing aid
Gender							
Male	7331	10.8%	39.5%		48.7%	55.5%	52.0%
Female	7564	8.8%	42.9%		51.3%	44.5%	48.0%
Age recoded							
1 - 14	2601	3.1%	26.1%		18.7%	6.8%	3.4%
15 - 24	1967	4.1%	25.0%		14.0%	6.3%	3.0%
25 - 34	1948	4.1%	32.5%		13.9%	5.7%	3.9%
35 - 44	2113	4.3%	25.3%		15.0%	8.0%	3.9%
45 - 54	2045	7.4%	18.1%		14.1%	14.5%	4.6%
55 - 64	1756	12.1%	38.6%		11.5%	15.3%	13.8%
65 - 74	1292	20.5%	47.9%		7.7%	16.3%	21.4%
74+	1173	42.1%	54.1%		5.2%	27.2%	46.0%
Type of household							
single household	1449	20.3%	47.7%		8.6%	18.2%	23.8%
Couple, no kids	3681	14.1%	43.7%		23.5%	34.7%	38.7%
Couple with kid(s)	6870	5.4%	32.6%		48.2%	29.0%	20.2%
Single mom/dad with kid(s)	1085	6.0%	34.3%		7.6%	4.3%	3.2%
Retirement home, hospital etc.	150	45.8%	54.3%		0.6%	3.8%	6.4%
Other	1659	8.5%	35.2%		11.3%	10.0%	7.8%

Demographics (2) Hearing instrument adoption rates and populations

Profiles: Categories add to 100%*

	Count	Hearing difficulty	Hearing aid adoption rate % (Base=hearing impaired)	No hearing loss	Hearing loss but no hearing aid	Hearing aid
Status						
The head of the household (alone or together with someone)	7130	13.5%	42.0%	46.3%	68.5%	72.6%
The spouse of the head of the household	2463	8.8%	41.0%	16.9%	15.1%	15.4%
Daughter/son of head of household	4098	3.1%	29.1%	29.6%	11.5%	6.9%
Other Person	1033	8.1%	41.7%	7.2%	4.9%	5.1%
Employment						
Full time employed	5033	5.7%	26.0%	43.8%	26.7%	12.9%
Part time employed	1514	7.5%	27.9%	13.0%	9.7%	5.2%
Unemployed / not working	1429	7.3%	38.8%	12.2%	8.0%	7.0%
Retired under a disability pension scheme (fully or partly)	383	20.0%	41.9%	2.9%	5.5%	5.5%
Early retired under an early retirement benefit scheme	523	23.9%	58.6%	3.7%	6.7%	13.1%
Retired (at the official retirement age)	2155	29.2%	50.2%	14.3%	40.1%	55.7%
Student / pupil / in training	1125	2.8%	12.2%	10.1%	3.4%	0.6%
Education						
Secondary/Grammar School	2597	17.3%	46.1%	19.9%	31.7%	37.3%
„O“ Levels	1930	9.8%	35.9%	16.1%	15.3%	11.8%
„A“ Levels	1704	8.0%	33.2%	14.5%	11.1%	7.6%
Ordinary National Certificate	475	11.4%	40.4%	3.9%	4.3%	4.0%
Higher National Certificate	749	11.4%	44.7%	6.2%	5.5%	6.2%
Technical High School	477	14.0%	41.4%	3.8%	4.9%	4.8%
University	3142	6.7%	39.0%	27.2%	15.4%	13.6%
Other	1086	16.3%	47.3%	8.5%	11.8%	14.6%