

Summary

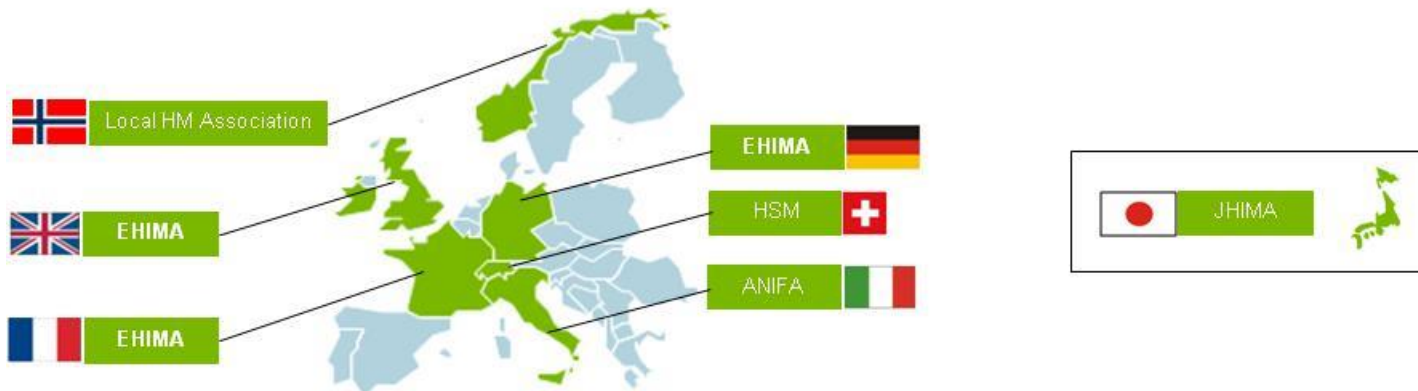
EuroTrak FRANCE2012

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

Summary

1. Introduction

- EuroTrak France 2012 was designed and executed by Anovum (Zurich) on behalf of the European Hearing Instrument Manufacturers Association (EHIMA).
- Sample sizes France 2012:
 - Representative sample (sample 1): n=15'430 people
 - Hearing impaired (sample 2): n=1'311 people
 - Hearing impaired non-owners: n=809 people with hearing loss (**HL**)
 - HA owners: n=502 people with hearing aid (**HA**)
- EuroTrak France 2012 is part of the EuroTrak studies:



Summary

2. Market overview

- Stated hearing loss prevalence
 - Total: 9.4% (18+: 11.5%).
 - Binaural hearing loss: HA owners: 76%, HA non-owners: 59%.
 - Tinnitus prevalence 26% (self stated, sometimes or permanently).
 - Hearing Tests: 29% had a hearing test in the last 5 years.
- Hearing aid adoption rate (HA penetration)
 - Total: 30.4% (2009: 29.8%).
 - Total age group 18+: 30.4 % (2009: 29.3%).
 - 74% of HA owners have binaural treatment. Trend rising (2009: 58%).
- The route to the hearing aid
 - 76% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
 - 48% got hearing aids recommended from the ENT or family doctor (drop out rate = 37%).
 - 76% of the GP consultations referred to an ENT. 12% recommended no action.
 - 33% of ENT consultations referred to a hearing aid dispenser / audiologist, 37% recommended to get a hearing aid, 38% 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
 - 77% received some kind of 3rd party reimbursement.
 - 74% of the currently owned HAs were fitted in 2009 or later.
 - The average age of the currently owned HAs is 2.5 years.
 - The median age of hearing aids before replacement is 5 years.
 - On average, HAs are worn 9.2 hours a day.
 - 54% of hearing aid owners have never heard of wireless technology in connection with hearing aids. Only 13% of the older (65y+) rate wireless technology as very important but 27% of the younger (up to 44y).
- Satisfaction with HAs
 - 80% 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.
- Positive impact of HAs
 - Significant positive impact of HAs on different aspects – especially communication, relationship at home and and social life.

Summary

4. Analysis of hearing impaired non-owners

- Reasons not to own/use HAs
 - Information deficit non-owners: 38% don't know whether insurance would pay, 30% assume they don't pay.
 - The main reasons for not using hearing aids are that people say they cannot afford a hearing aid, the ENT's opinion and that they have more serious priorities.
 - 3% who own HAs don't use them at all; 7% use them less than one hour/day. Main reasons for this are: "Hear well enough in most situations", "They do not work well in noisy situations" and "Uncomfortable".
- 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.
 - 7% of non-owners intend to get a hearing aid within the next year.
 - The most important influencing factors are worsening of hearing, ENT, significant others and audiologist (for owners). Costs are also important, but only for the non-owners.

Results

EuroTrak France 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 – France/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

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=15'430** people based on census data.

Step 2: Target population interviews

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

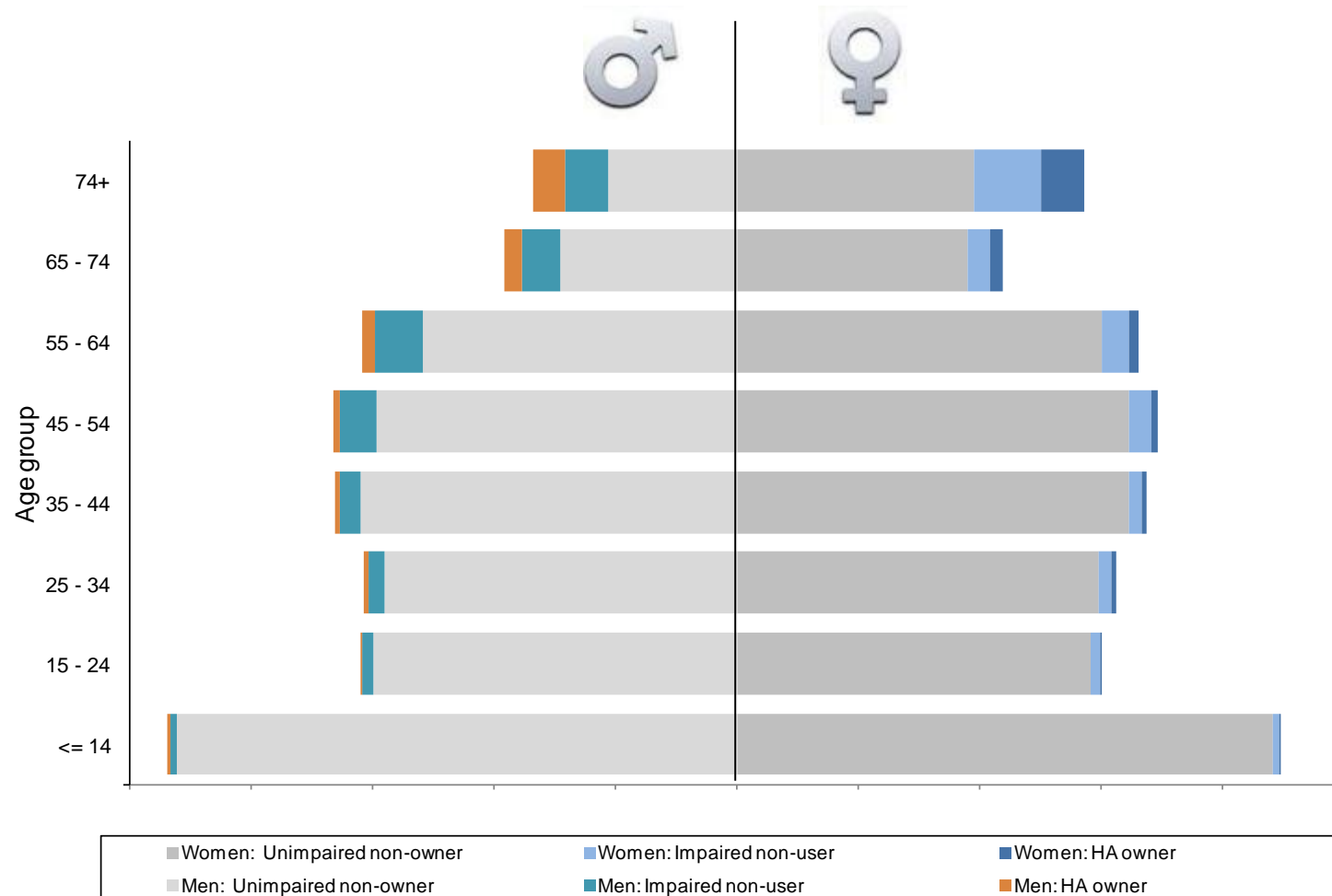
Process:

1. Main questionnaires: Owners and hearing impaired non-owners
2. Balancing through weighting according to representative screening interviews
3. Resulting sample: **n=502** hearing aid owners and **n=809** hearing impaired non-owners

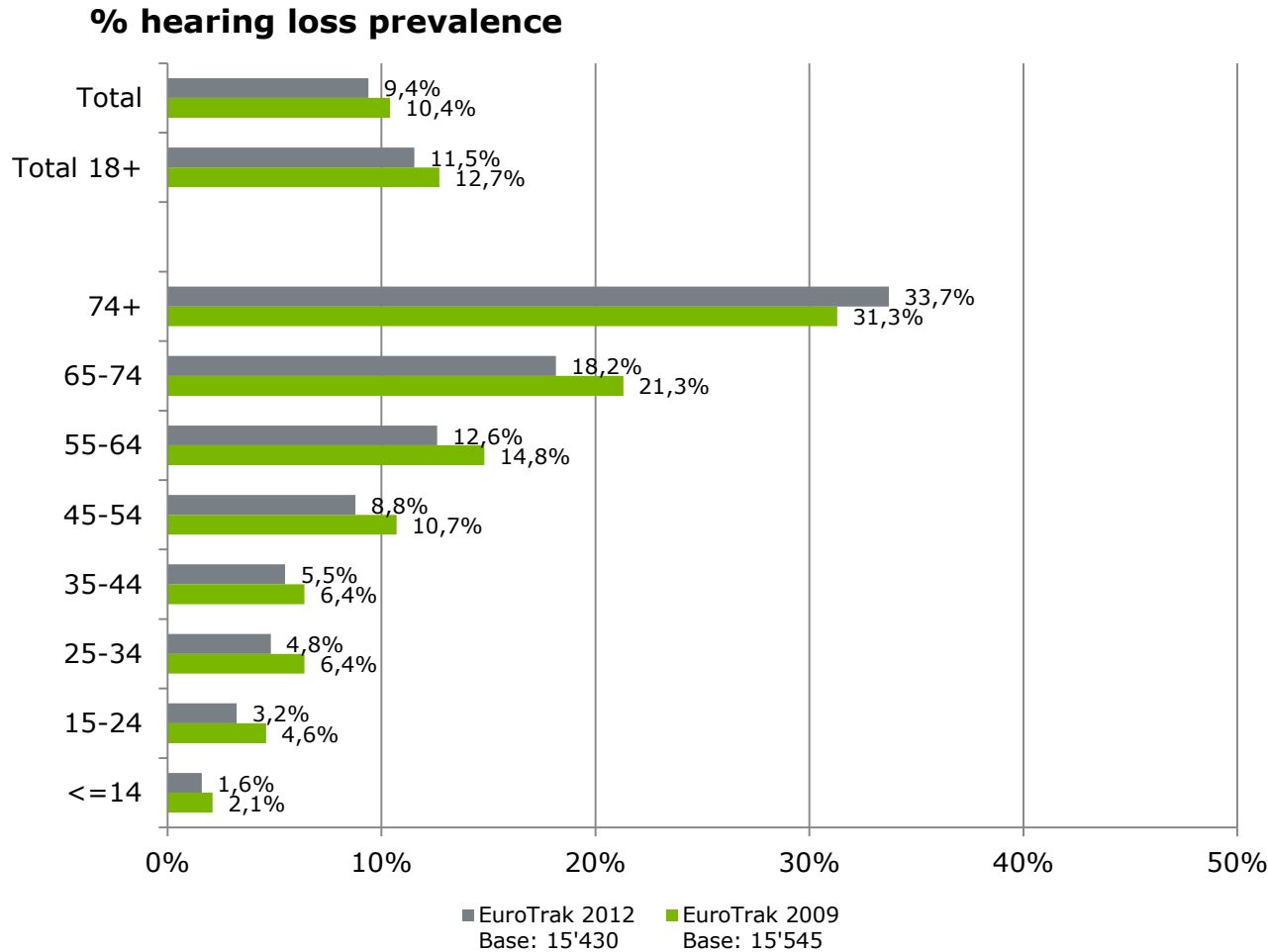
2. Market overview

Prevalence of hearing loss and adoption rate

Hearing loss and hearing instrument ownership by gender/age

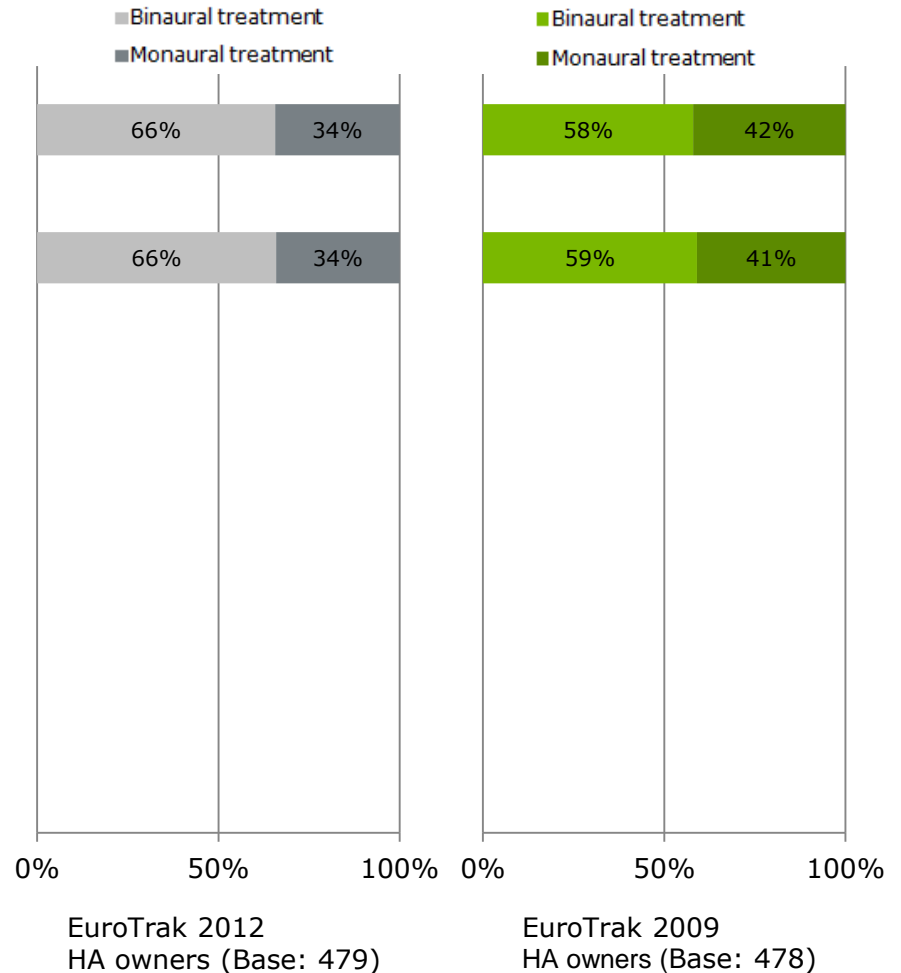
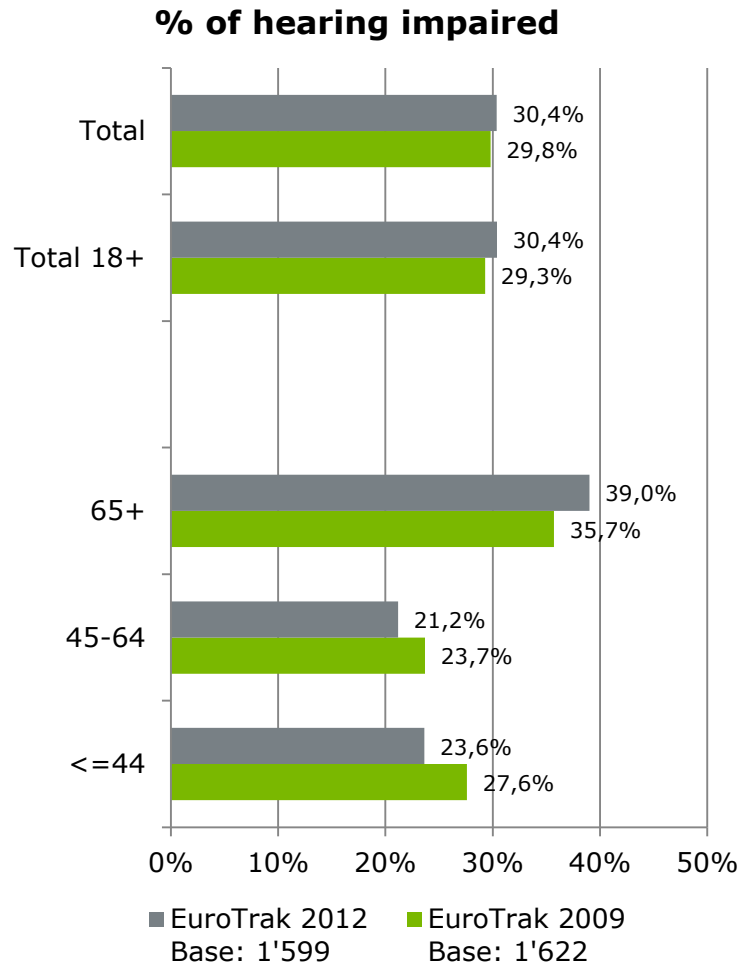


Hearing loss prevalence France 2012

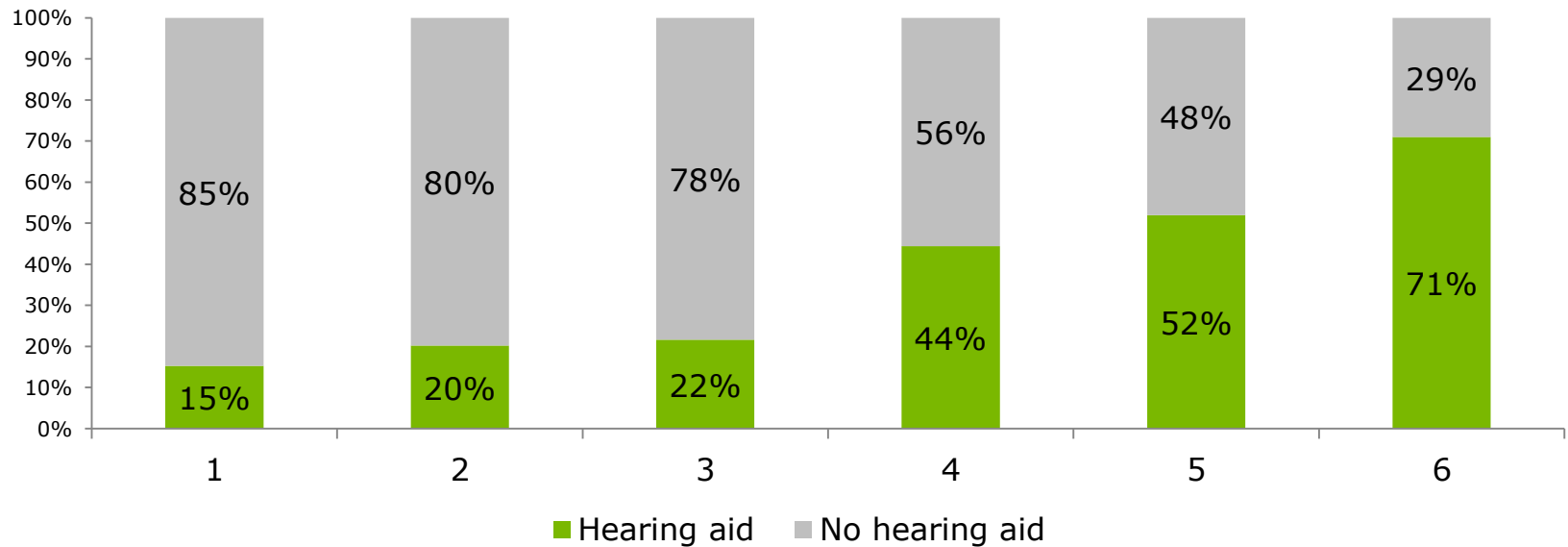


Hearing aid adoption rate France 2012

30% of hearing impaired have hearing aid(s), 66% of them have binaural treatment



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



Hearing loss 6-groups*

HA-non-owner, n=809
HA-owner, n=502

* 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

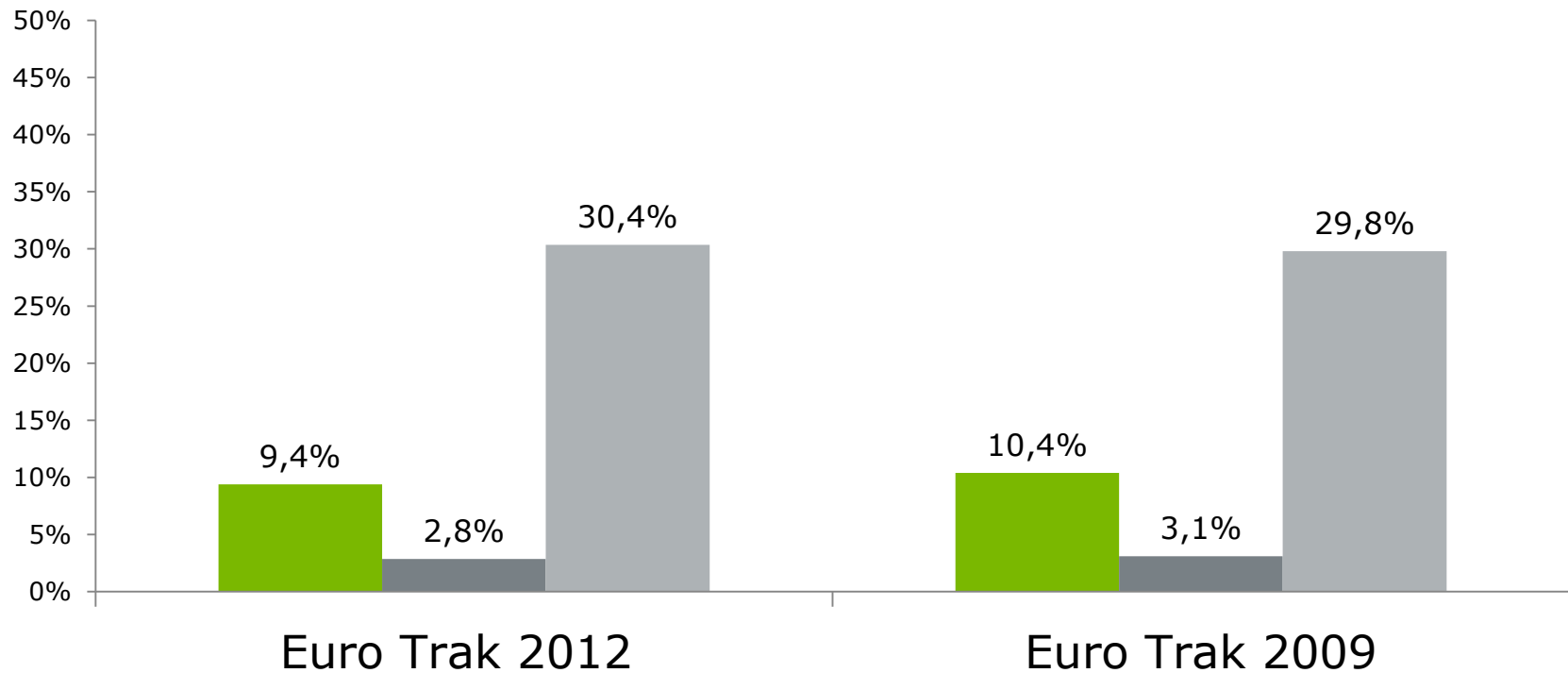
Hearing loss characteristics: Owners compared to non-owners

	HA-Non-owner 2012: n= 809 (2009: n= 803)	HA Owner 2012: n= 502 (2009: n= 501)	Hearing Aid Adoption (%)
Ears impaired (stated)			
Unilateral loss	41% (39%)	24% (29%)	25% (25%)
Bilateral loss	59% (61%)	76% (71%)	42% (33%)
Perceived loss			
Mild	29% (26%)	5% (6%)	9% (9%)
Moderate	54% (50%)	47% (46%)	31% (28%)
Severe	13% (19%)	39% (36%)	59% (47%)*
Profound	4% (5%)	9% (12%)	

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

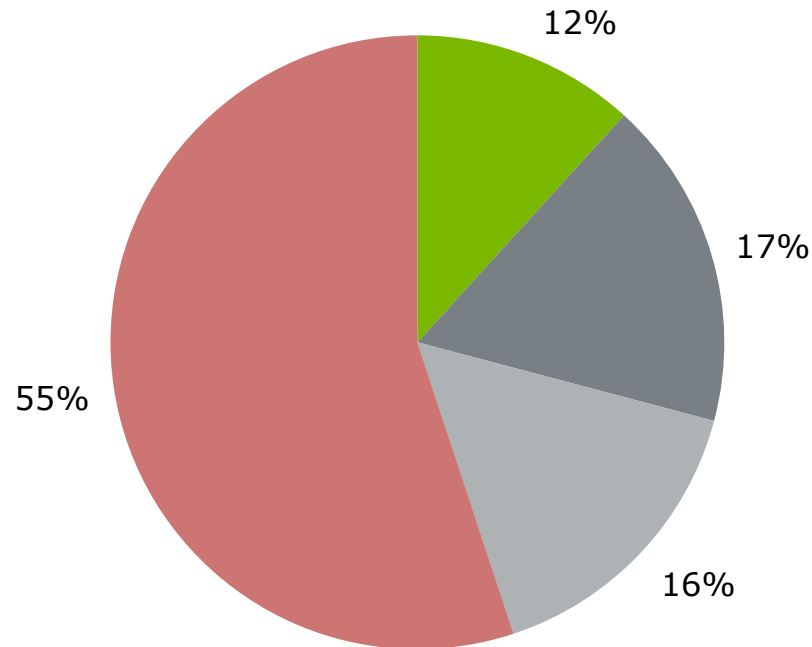


■ Hearing impaired (stated) ■ Adoption (% of population) ■ Adoption (% of stated impaired)

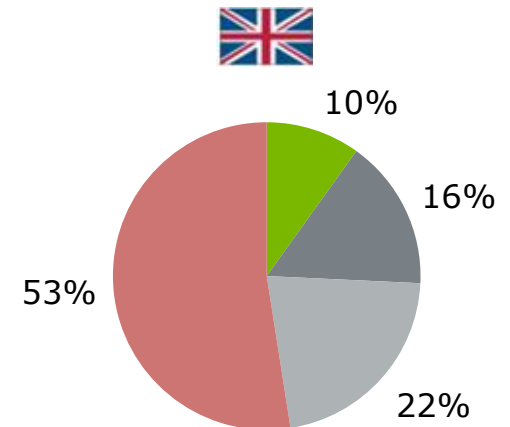
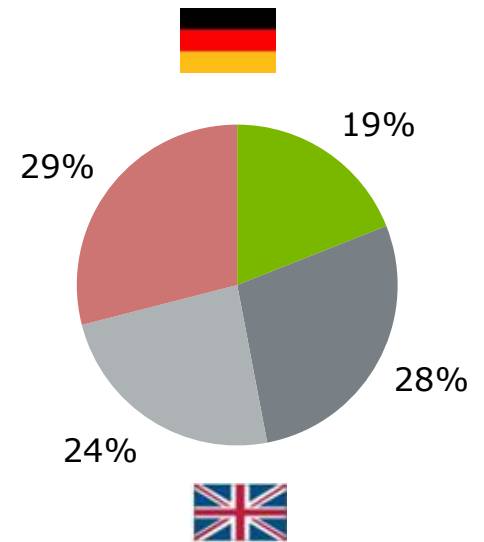
Hearing tests and prevalence of tinnitus

55% of the 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

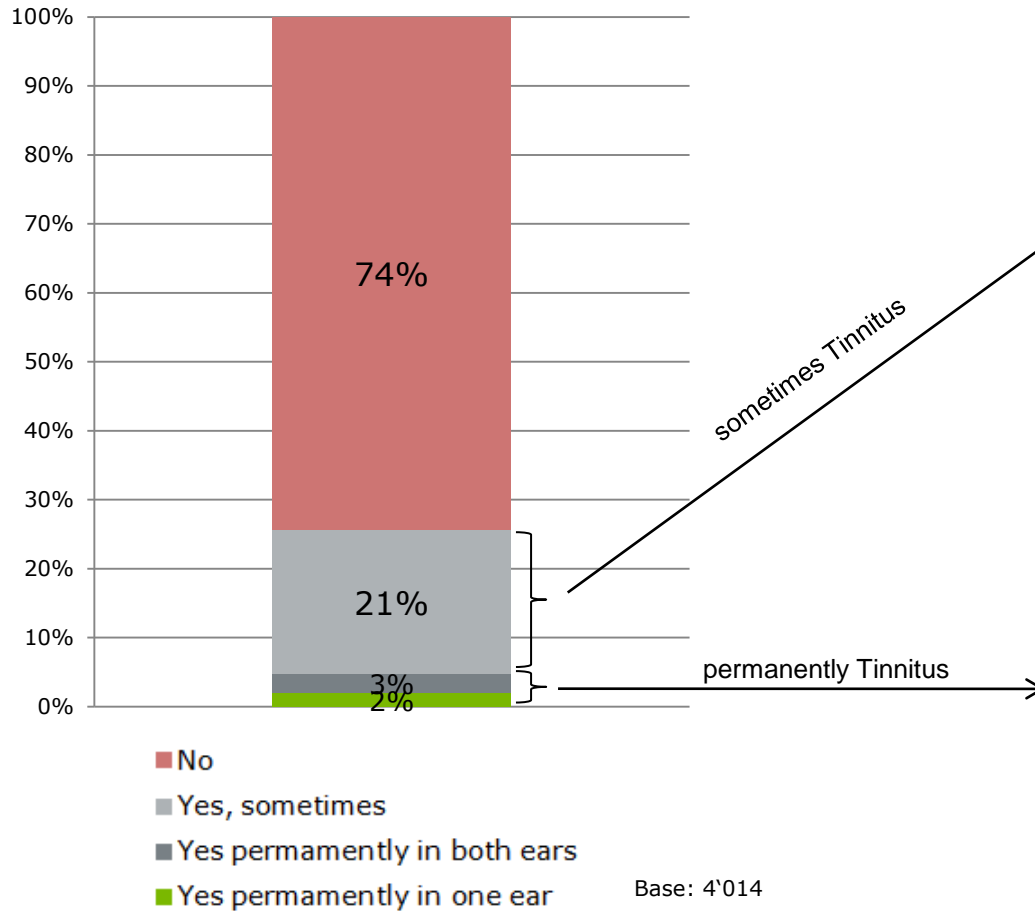


Base= 12'616

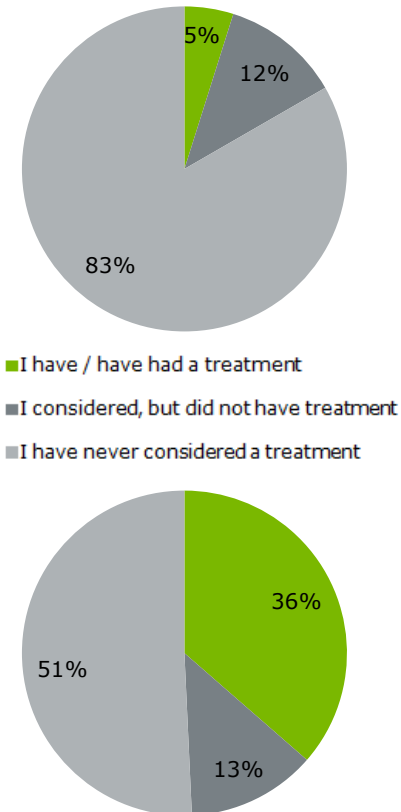


Prevalence of tinnitus

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

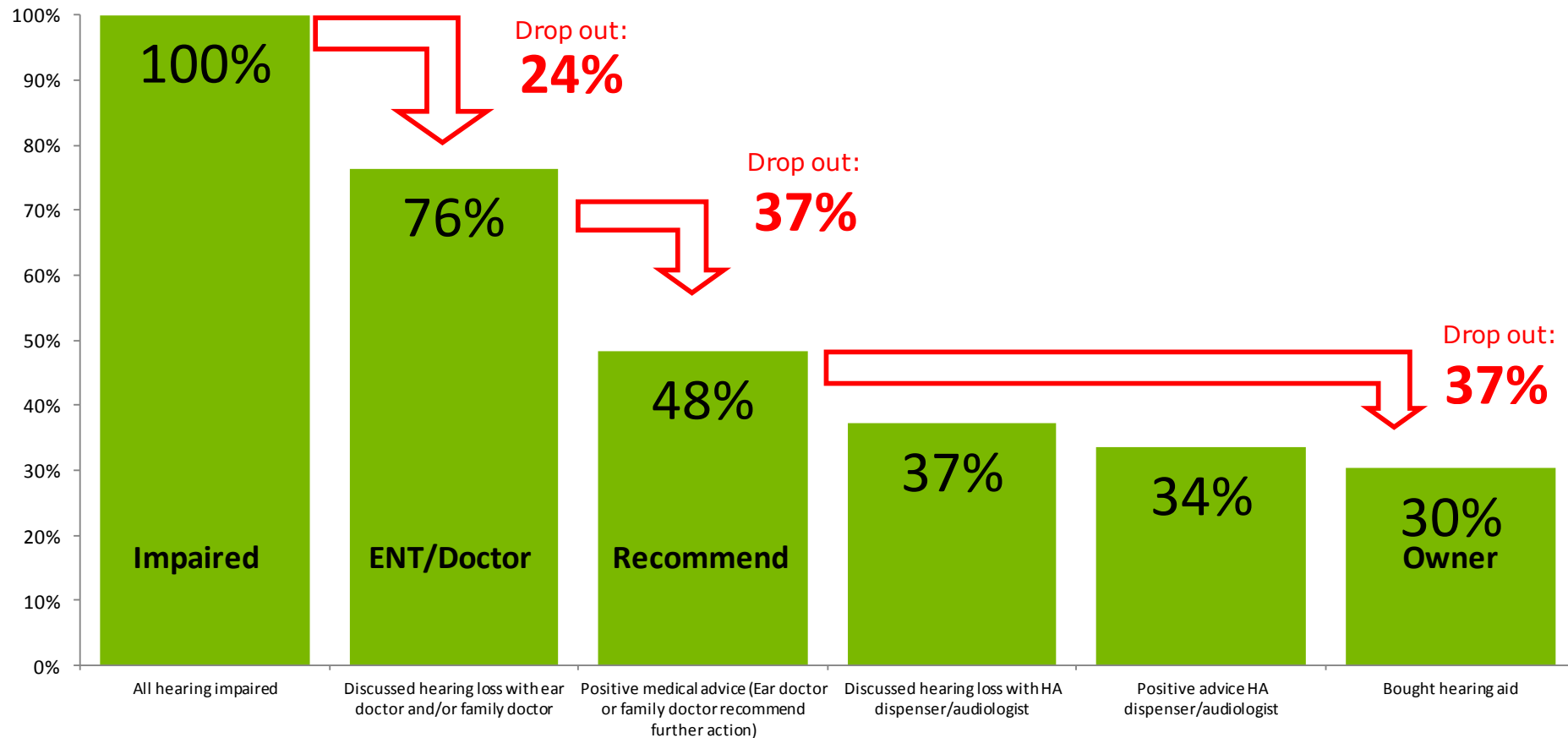


Have you ever thought about a treatment of your tinnitus?



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

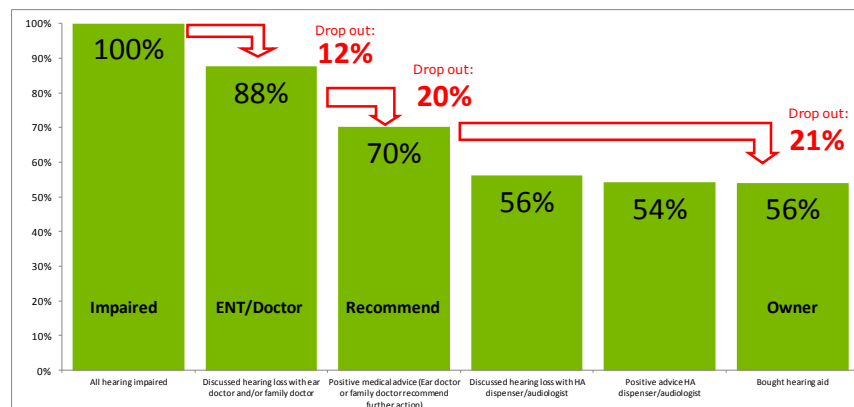
The route to the hearing aid: Overview



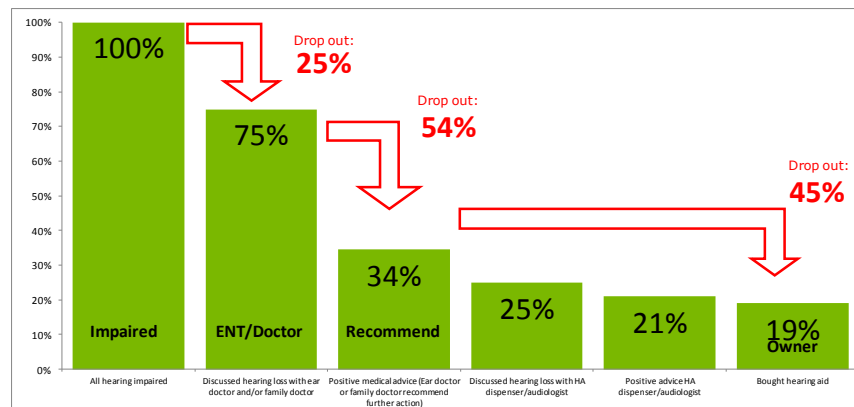
Base: n=1'311

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

Top 50% hearing loss*



Low 50% hearing loss*

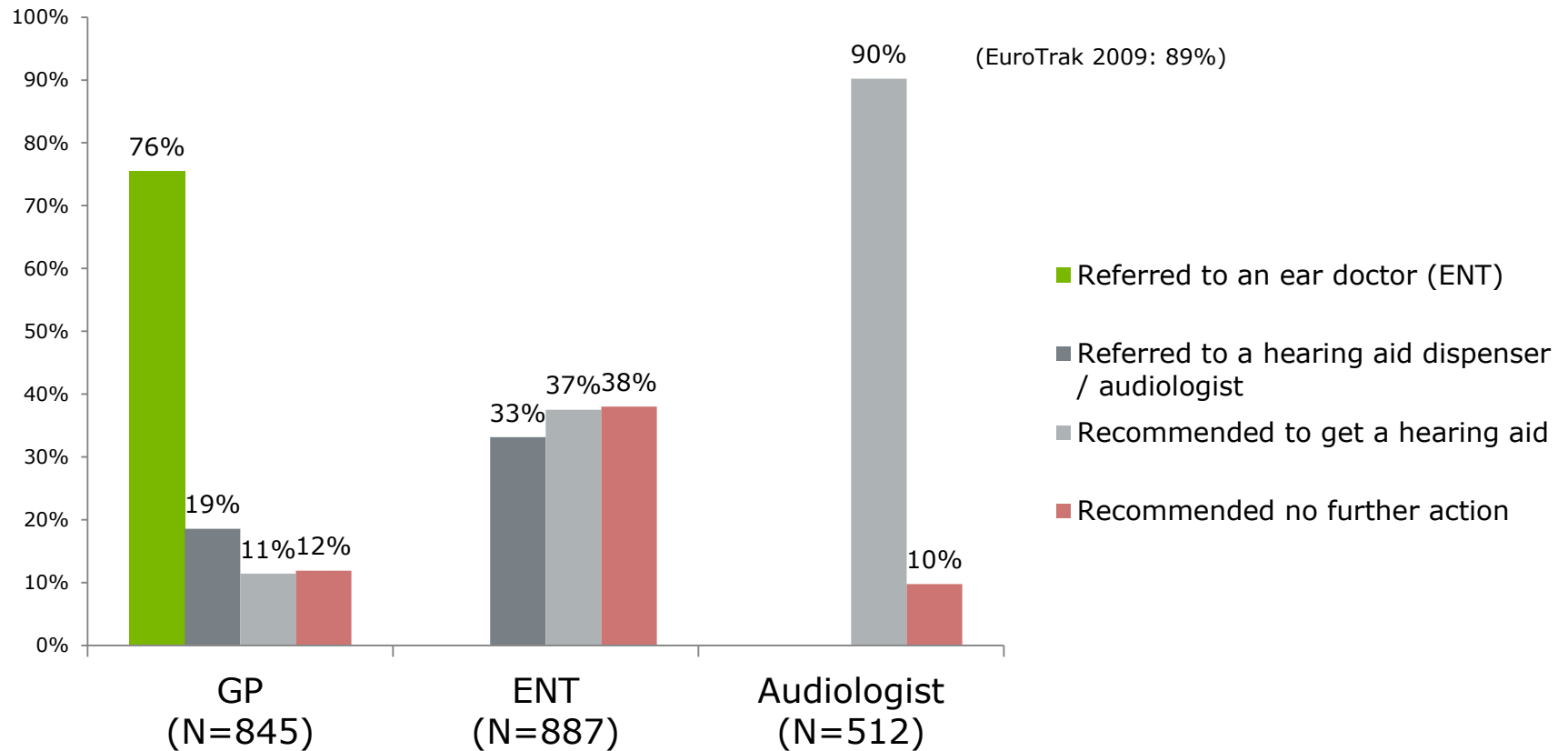


Base: n=1'311

* 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).

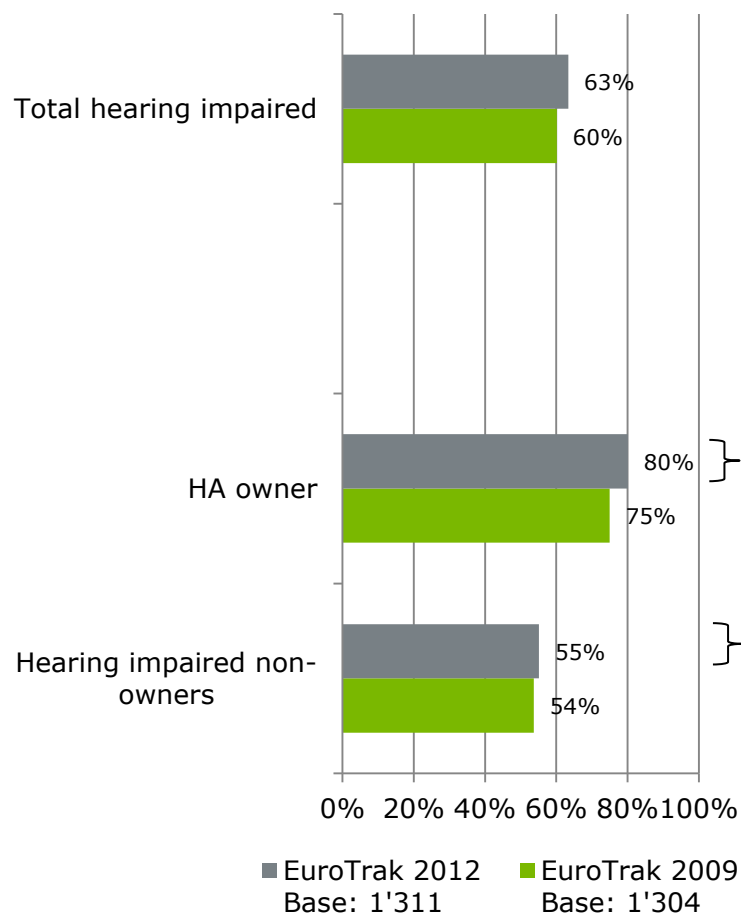
Recommendations by profession



The route to the hearing aid: GP/Family doctor

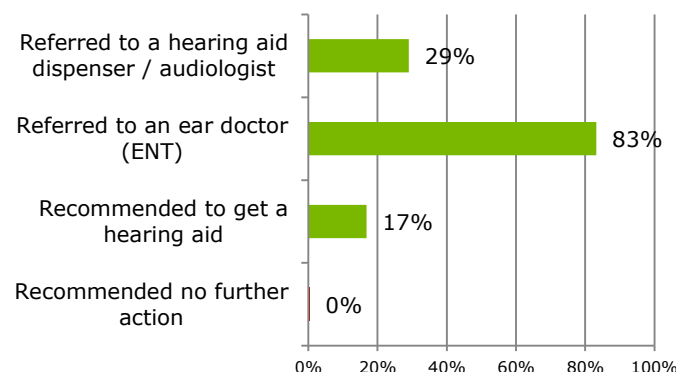
Have you discussed your hearing problem with your family doctor?

% Discussed with GP

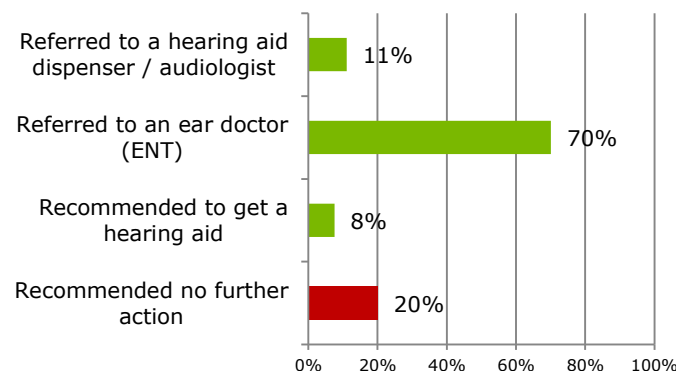


What did he/she recommend ?

HA owner (Base: 392)

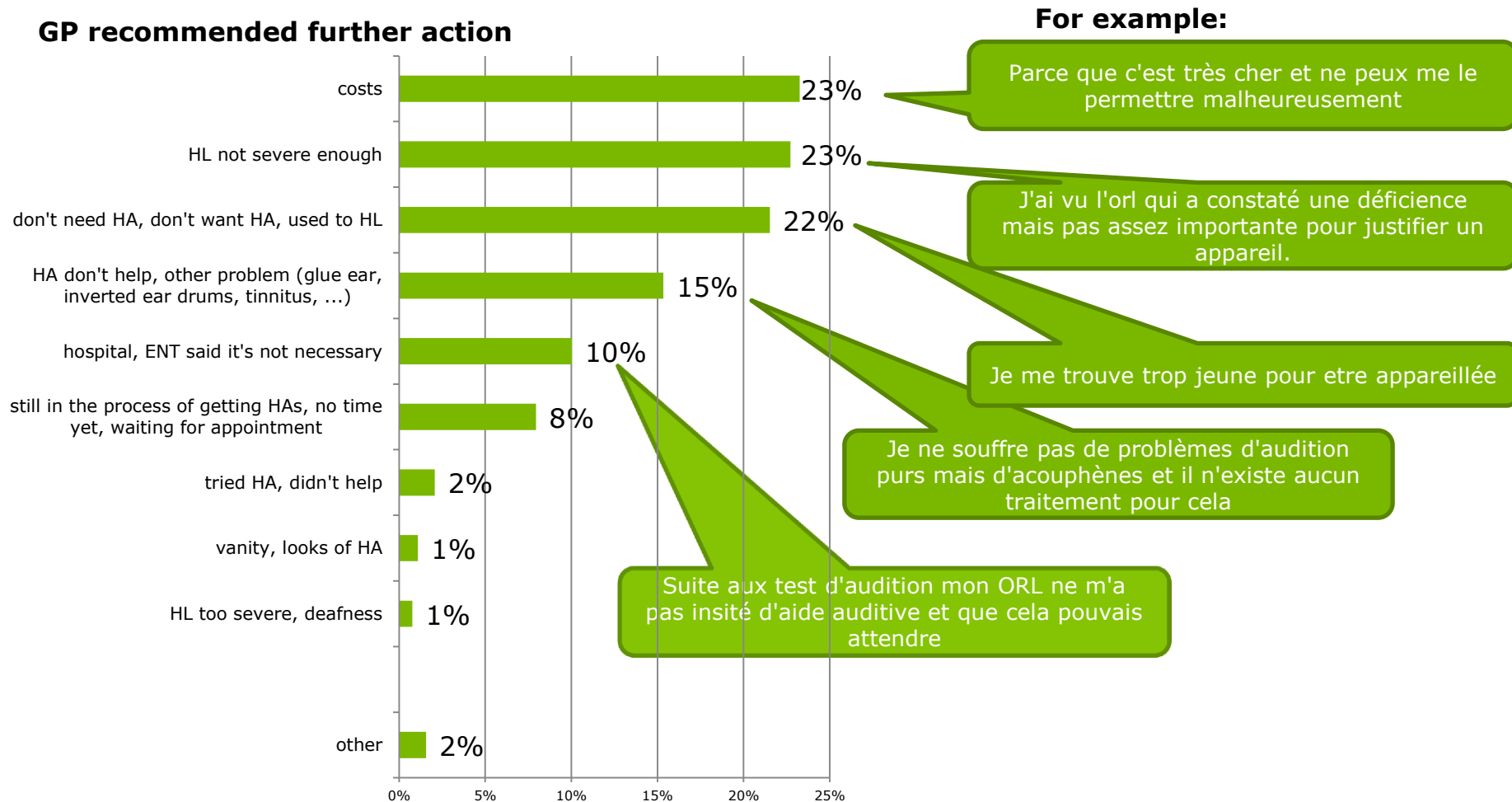


Impaired non-owner (Base: 453)



Non-owners: Reasons for not owning a HA

If GP recommended further action (open ended question)

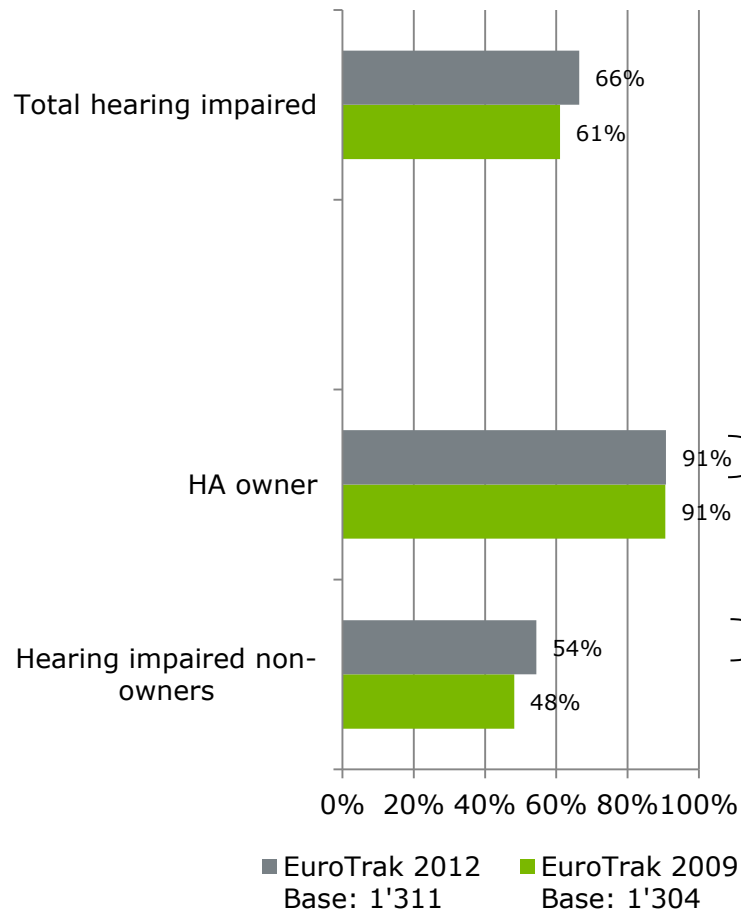


Base: 342

The route to the hearing aid: ENT

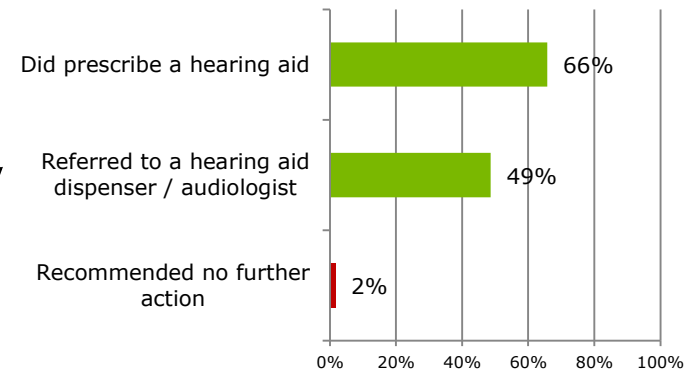
Have you discussed your hearing problem with an ear doctor (ENT)?

% Discussed with ENT

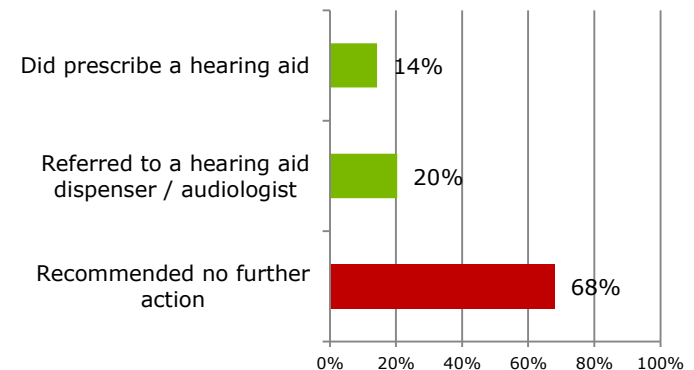


What did he/she recommend ?

HA owner (Base: 457)



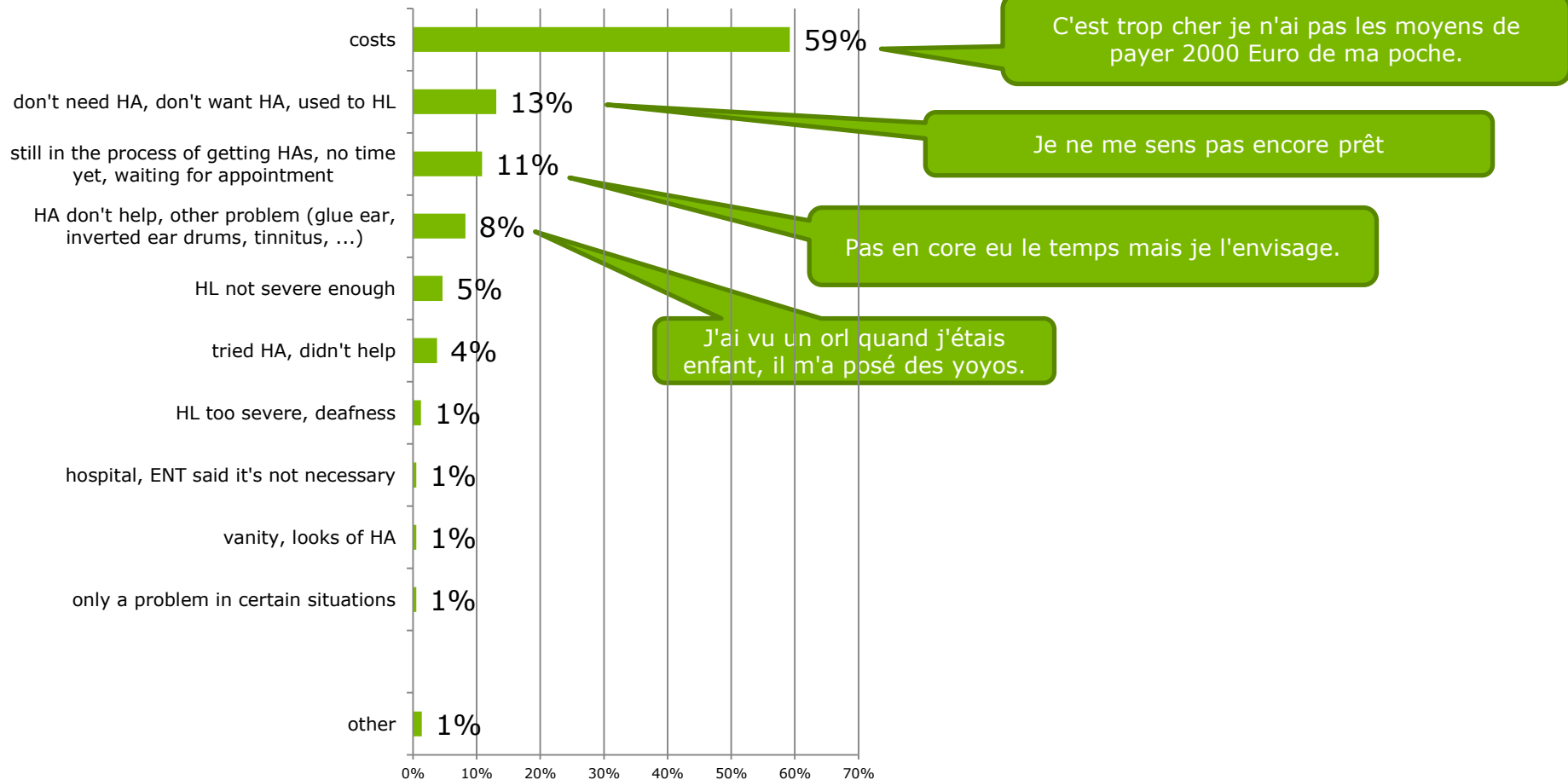
Impaired non-owner (Base: 430)



Non-owners: Reasons for not owning a HA

If ENT recommended further action (open ended question)

ENT recommended further action

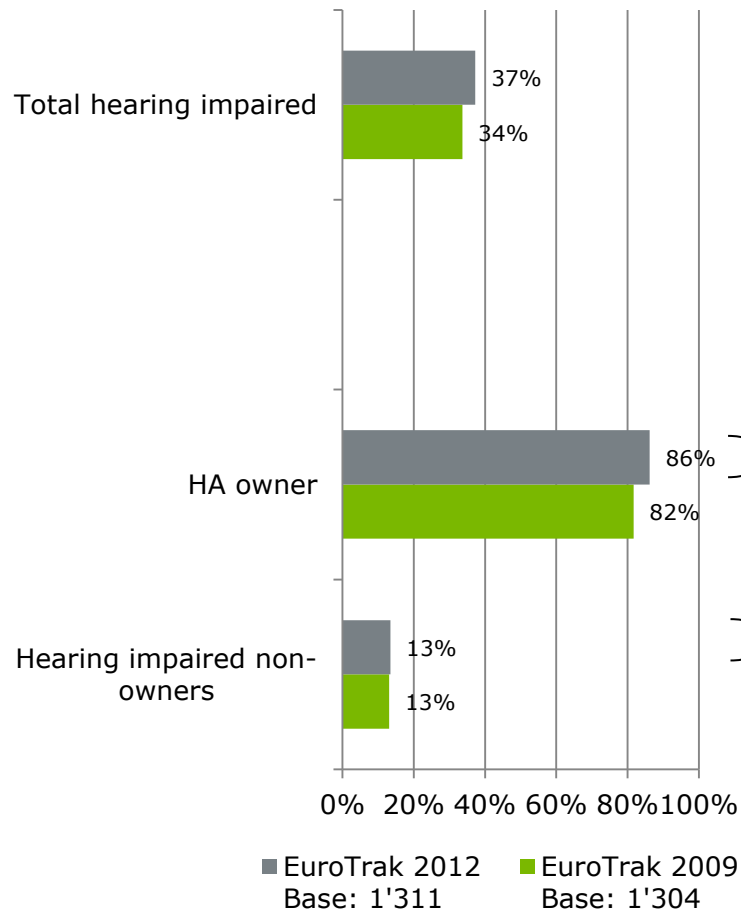


Base: 114

The route to the hearing aid: Audiologist

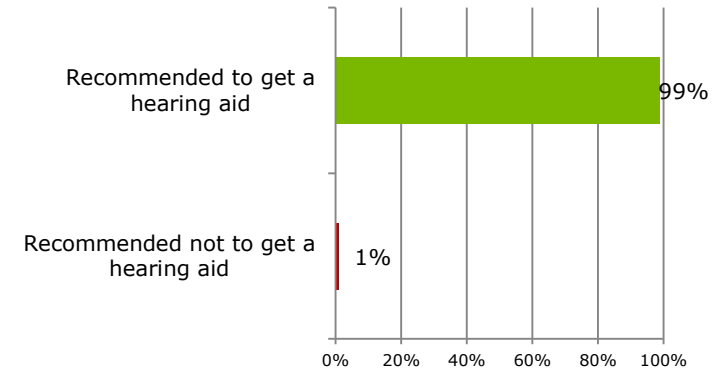
Have you discussed your hearing problem with a Hearing Aid Dispenser/Audiologist?

% Discussed with Audiologist

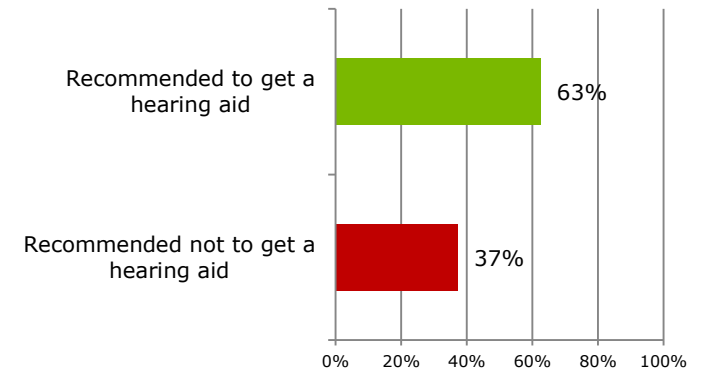


What did he/she recommend ?

HA owner (Base: 413)



Impaired non-owner (Base: 99)

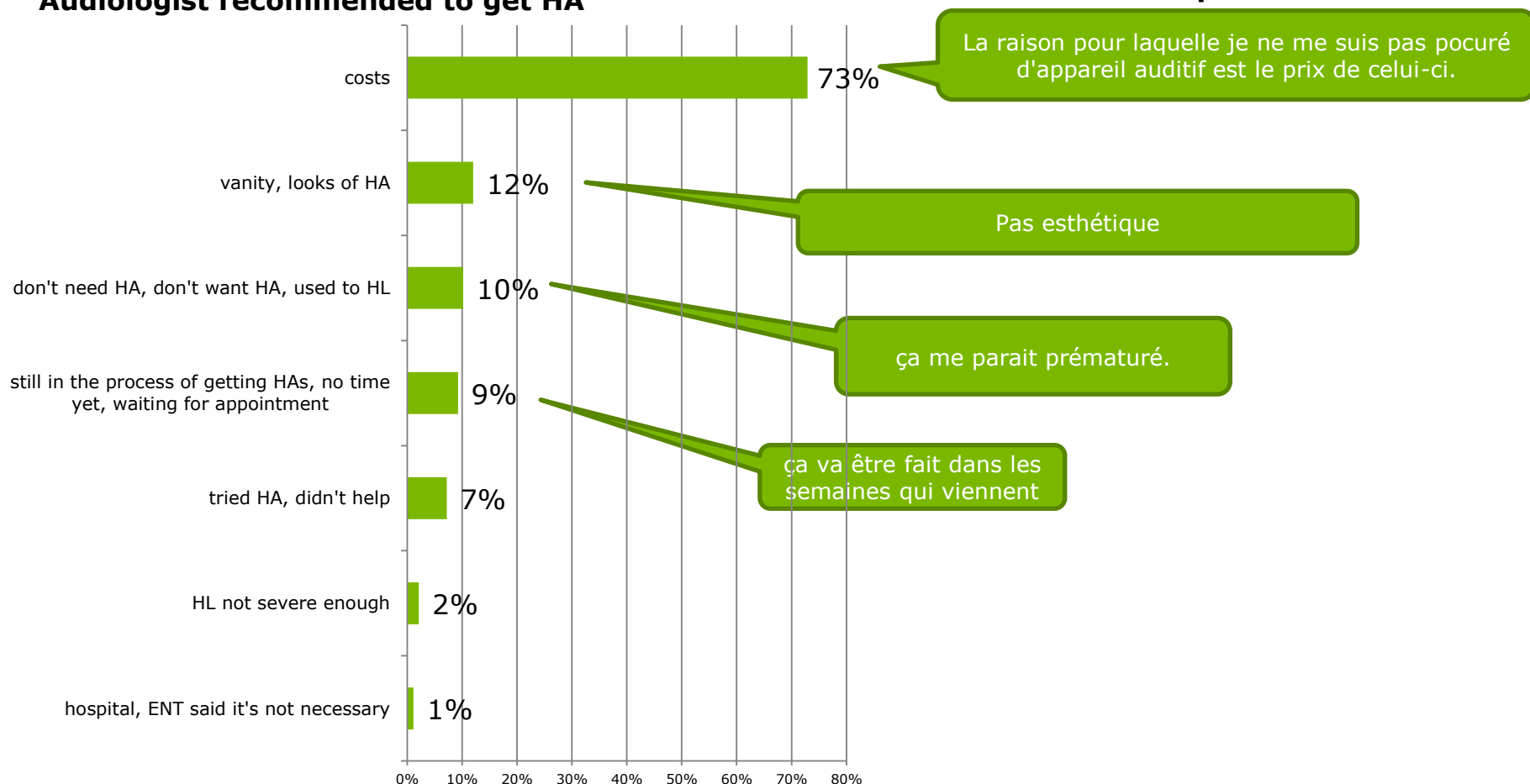


Non-owners: Reasons for not owning a HA

If Audiologist recommended to get HA (open ended question)

Audiologist recommended to get HA

For example:

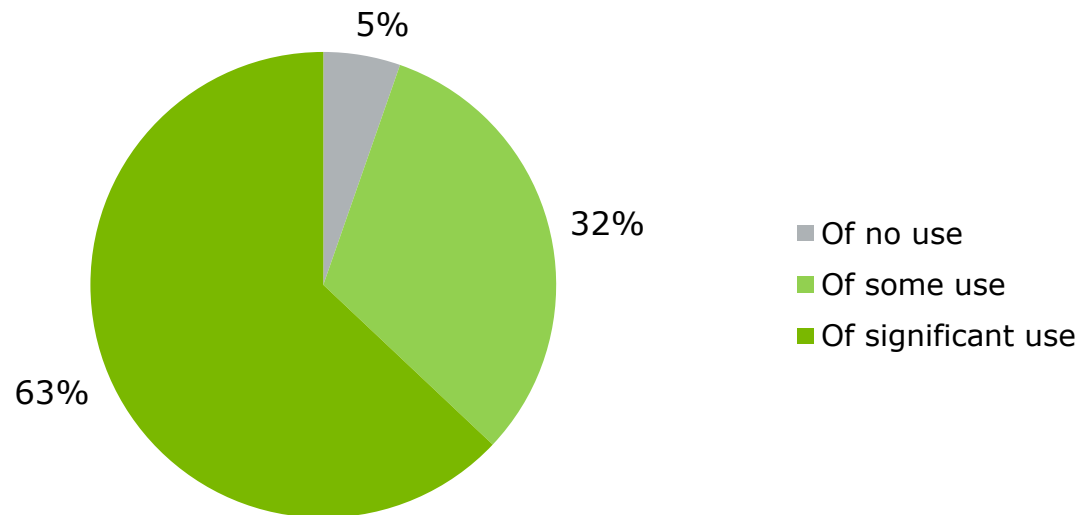


Base: 51 (low sample size!)

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

Work competitiveness: 95% of the working hearing aid owners state their hearing aid(s) are useful on their job.

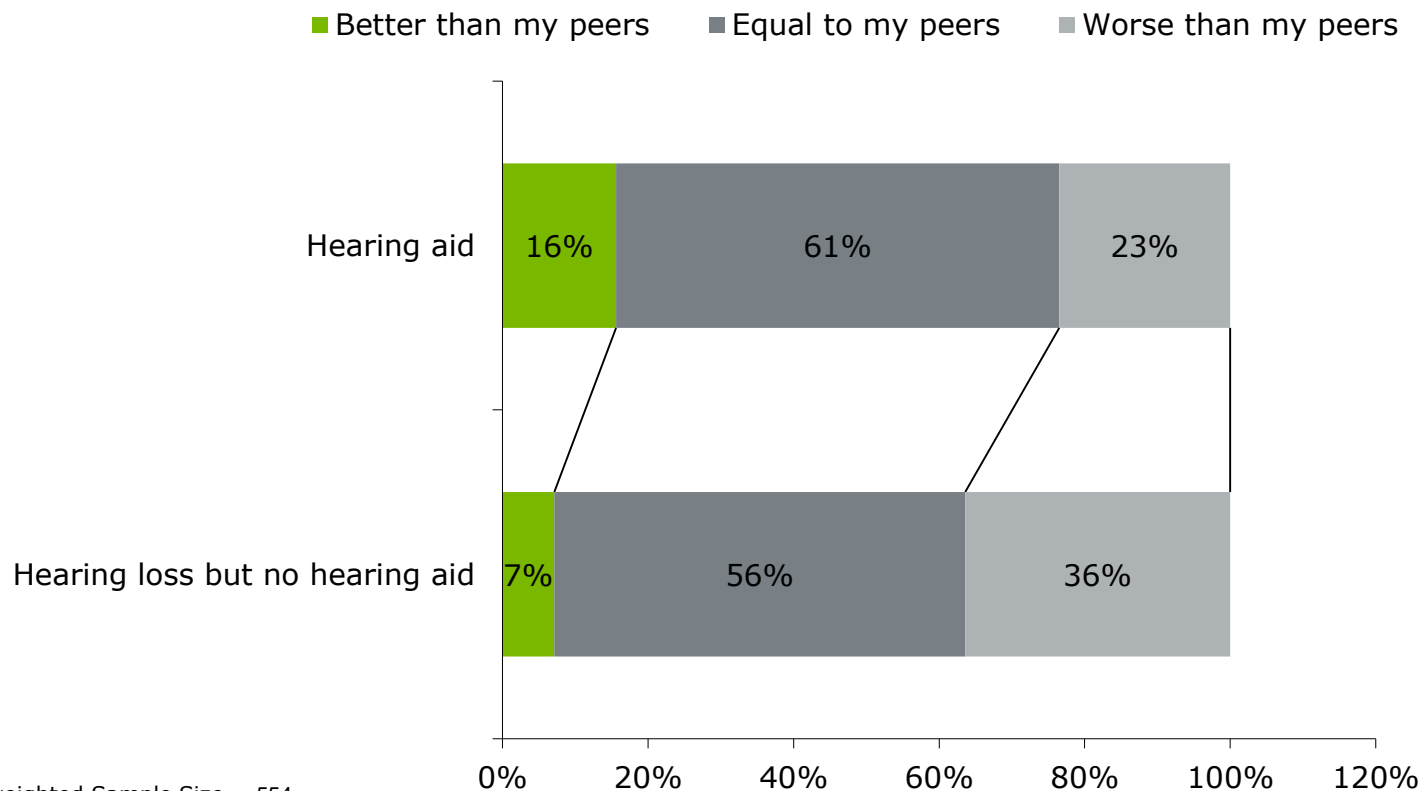
How useful are your hearing aids on your job?



Work competitiveness : 36% of impaired people without hearing aid tend to think they receive a worse compensation for their jobs than their peers (23% 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 ?

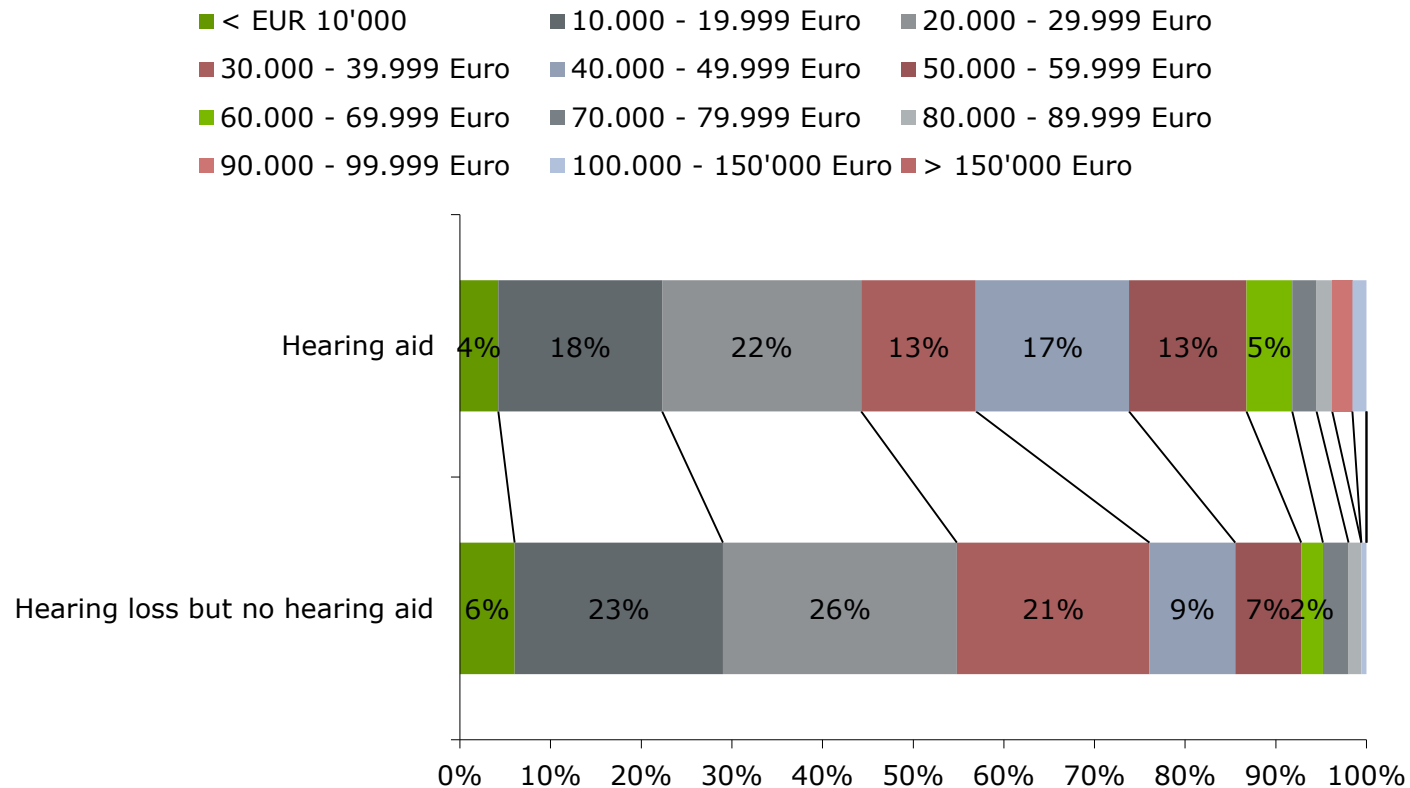
Base: Employed (full/part time)



Work competitiveness: People with hearing aid(s) tend to have a higher personal income compared to impaired non-owners

Personal income

Base: Employed (full/part time)

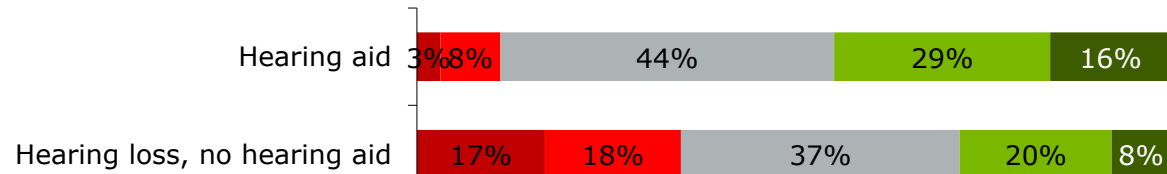


Unweighted Sample Size = 617

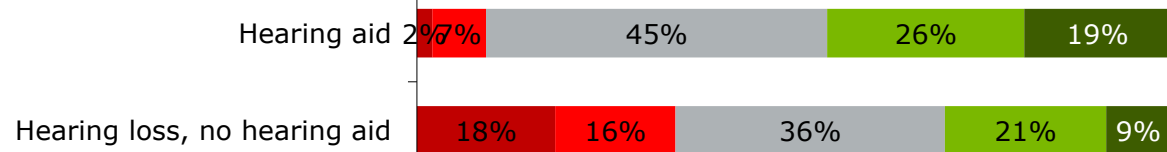
Work competitiveness: People with hearing aids recognize that hearing aids increase the chance of hearing impaired to get promoted, to get the right job and to get more salary

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

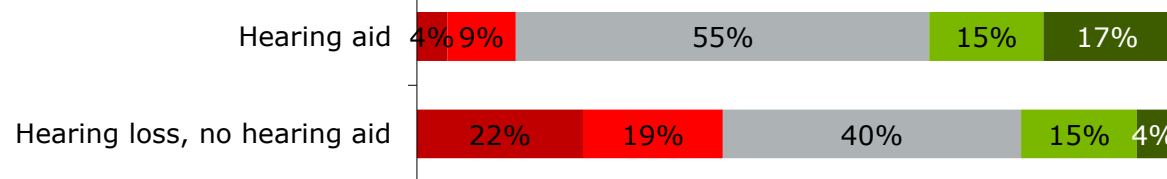
I think that people with an untreated hearing loss tend to be less promoted in their job



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 =614/ hearing aid n=409

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

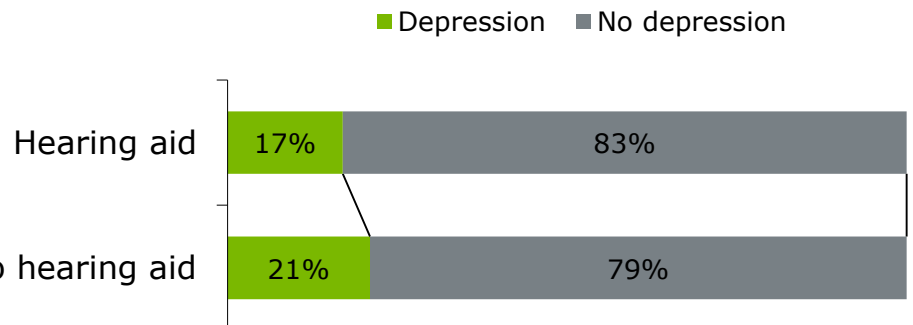
Depression symptoms:

PHQ-2 Screening:

In the last 2 weeks:

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

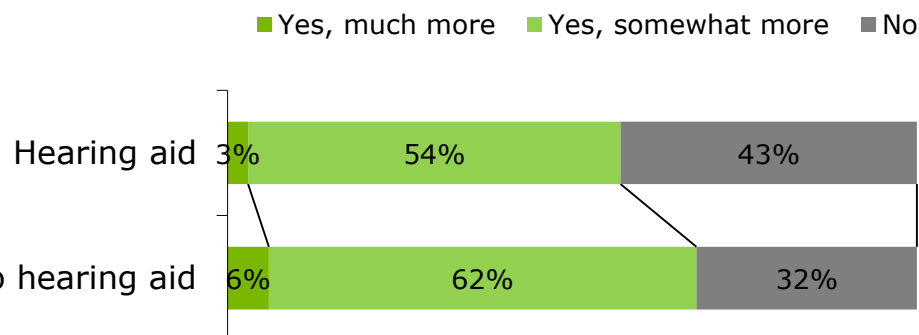
Top 50% hearing loss, no hearing aid



Dementia symptom:

Getting more forgetful in
the last year?

Top 50% hearing loss, no hearing aid



Base: hearing aid n=357 / no hearing aid =167

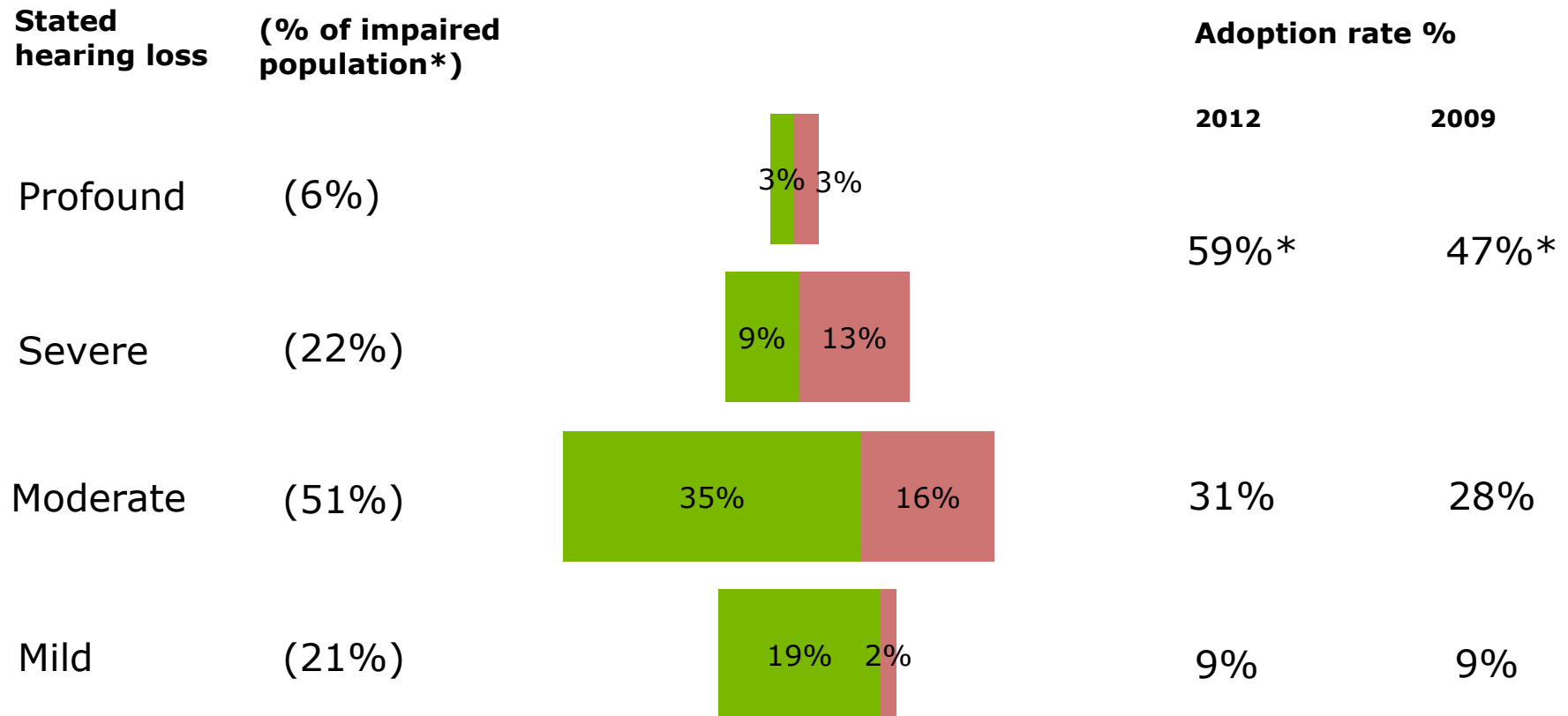
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 - When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).

3. Analysis of hearing aid owners

Hearing aid ownership and usage

Low adoption rates within mild and moderate hearing loss



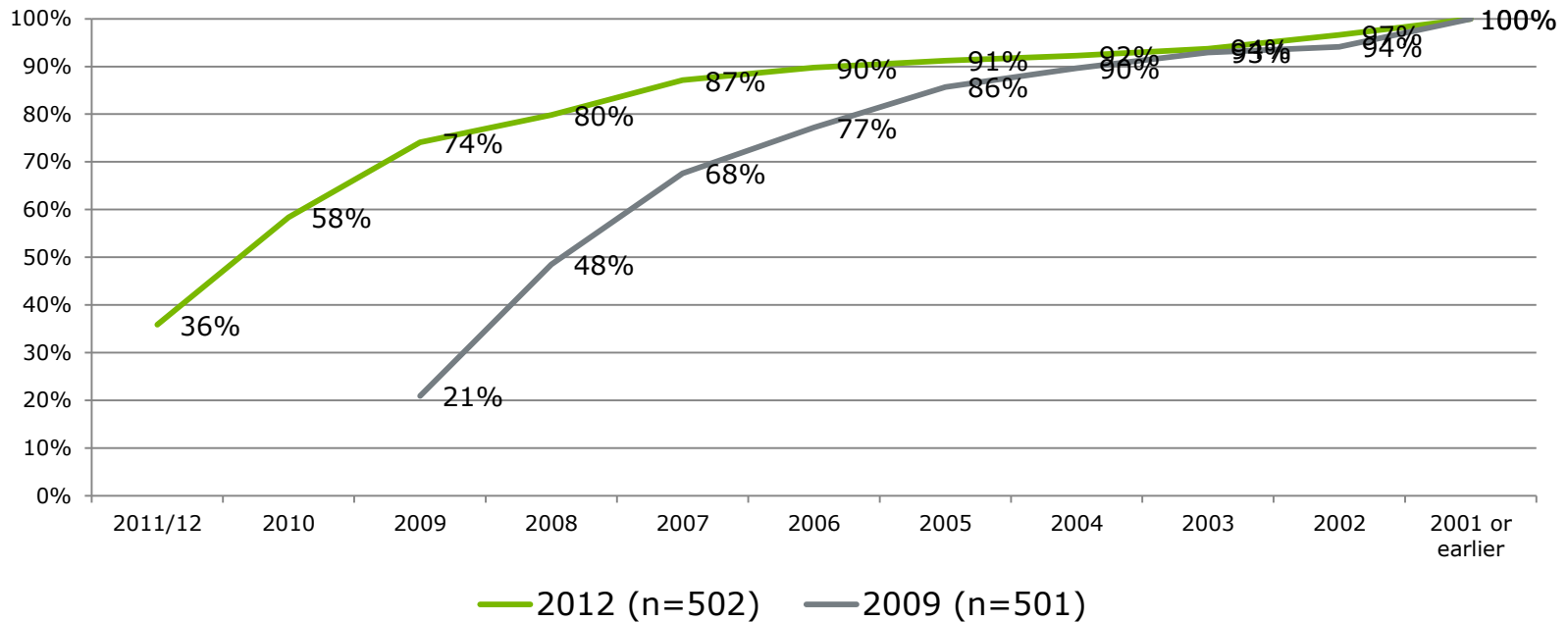
Base: n=1'311

Sums can differ from 100% due to rounding

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

74% of the currently owned HAs were fitted in 2009 or later

Year of purchase



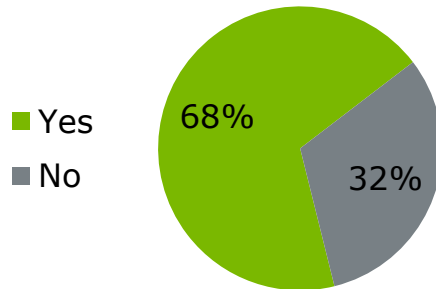
Age of currently owned HAs (Mean):

2012: 2.5 years

2009: 2.9 years

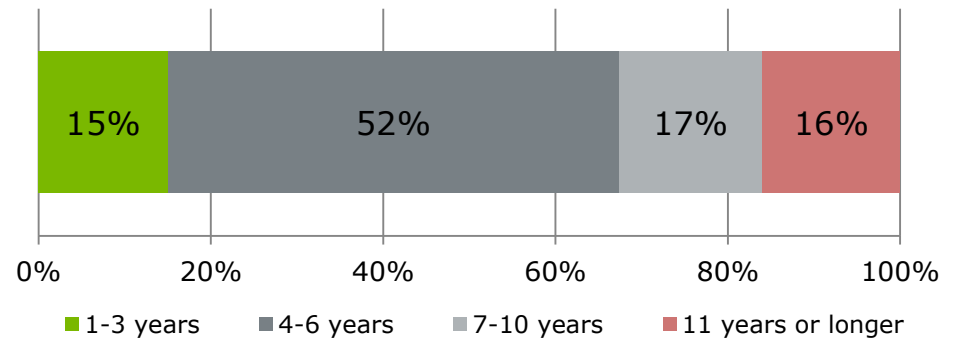
68% are first time HA users – non first time users kept their HAs for 5 years on average

Current HAs = first HAs?



Base: n=500

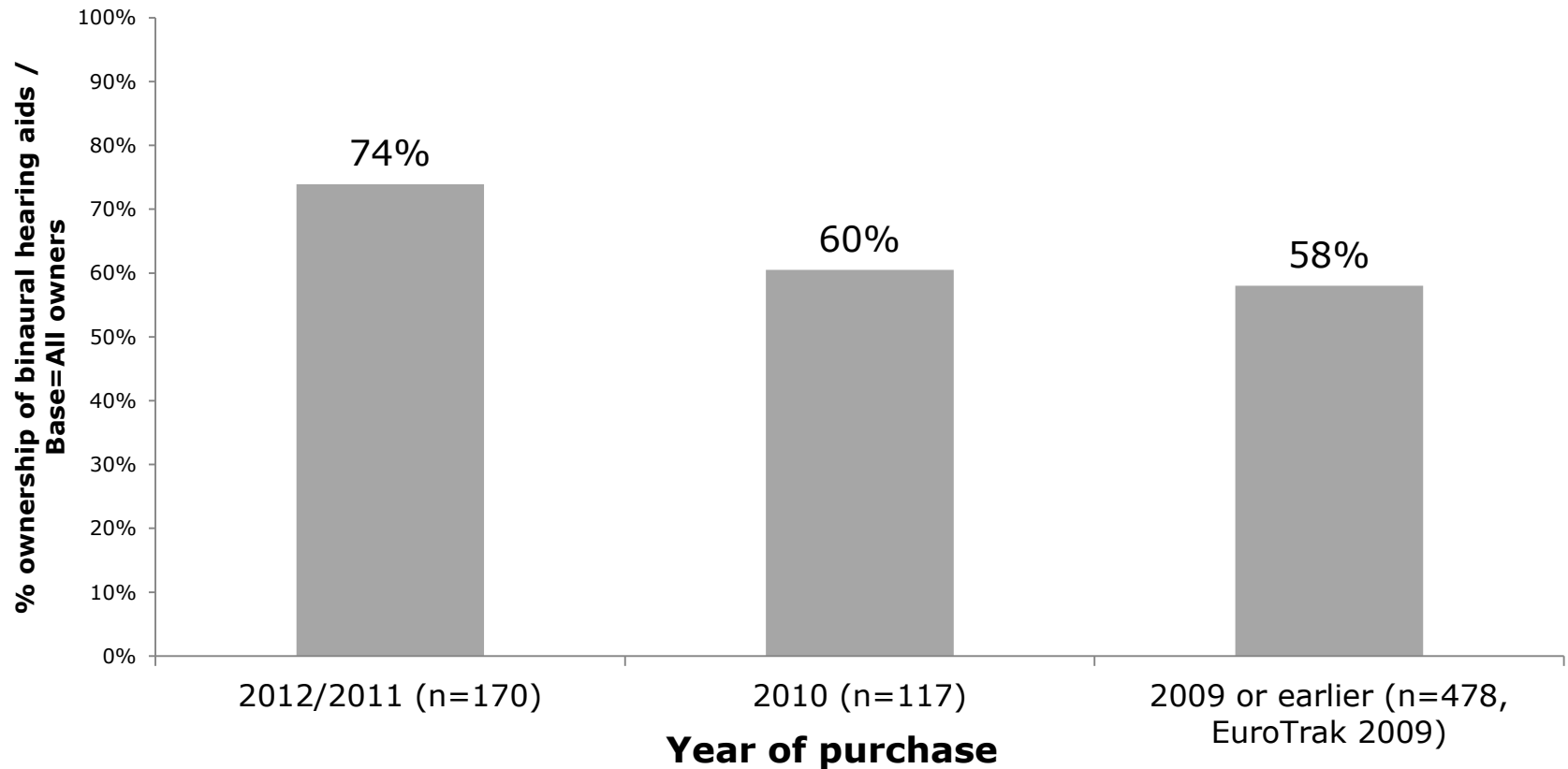
How many years did you own your previous HAs?



Base: n=145

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

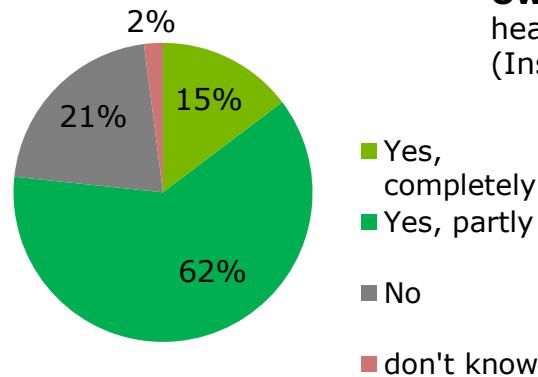
Monaural-binaural treatment by purchase date



77% received some kind of 3rd party reimbursement

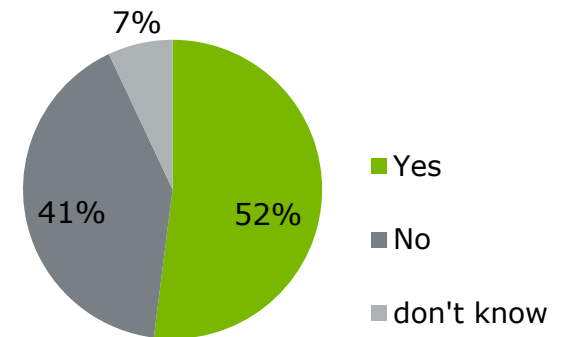
Information deficit non-owners: only 32% know whether insurance would pay

2012



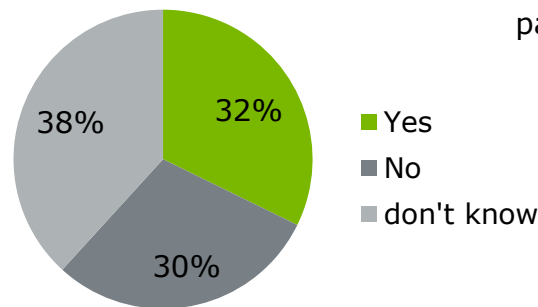
HA-owner, n=502

2009

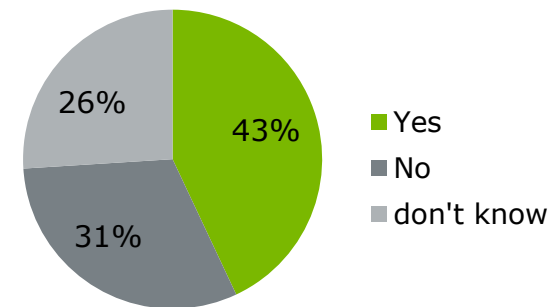


HA-owner, n=501

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=809



HA-non-owners, n=803

On average, HAs are worn 9.2 hours a day

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

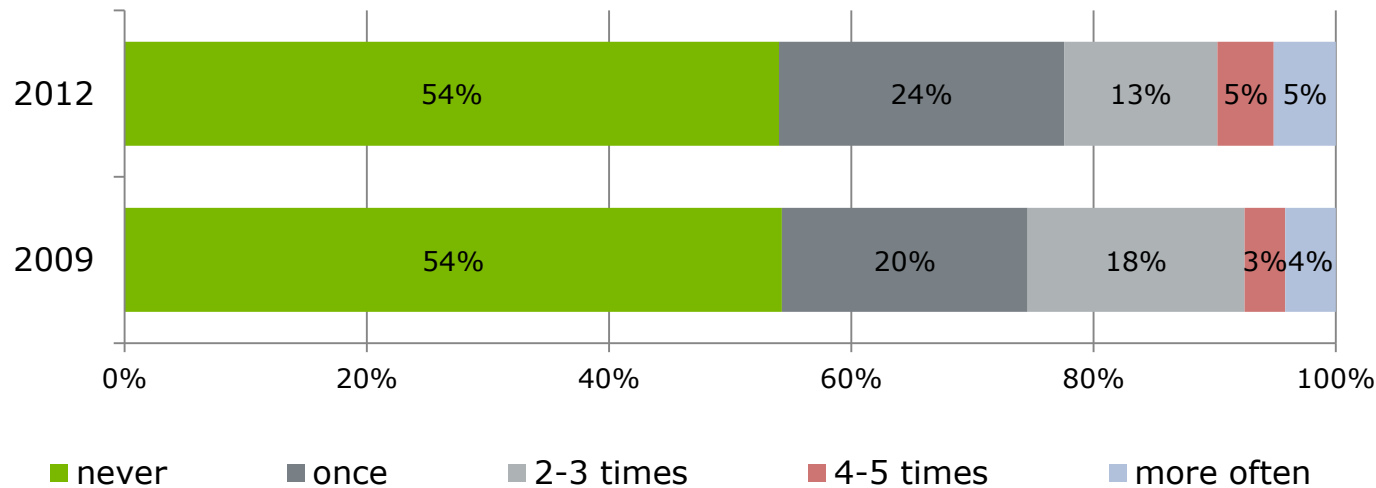


HA worn:
2012: Mean: 9.2 hours/day
2009: Mean: 8.3 hours/day

HA-owner:
2012: n=502
2009: n=501

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?

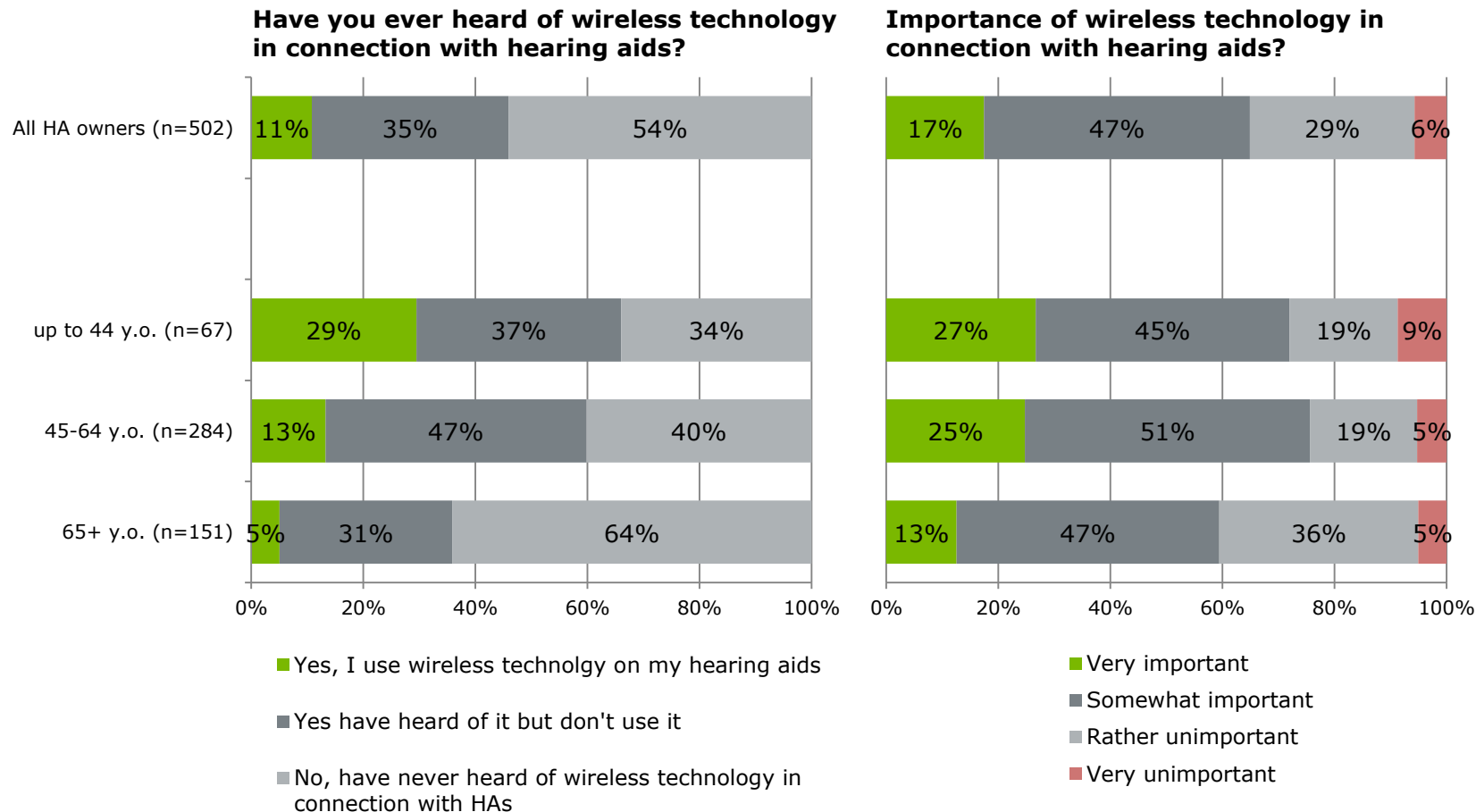


HA-owner:
2012: n=502
2009: n=501

Awareness and importance of wireless technology

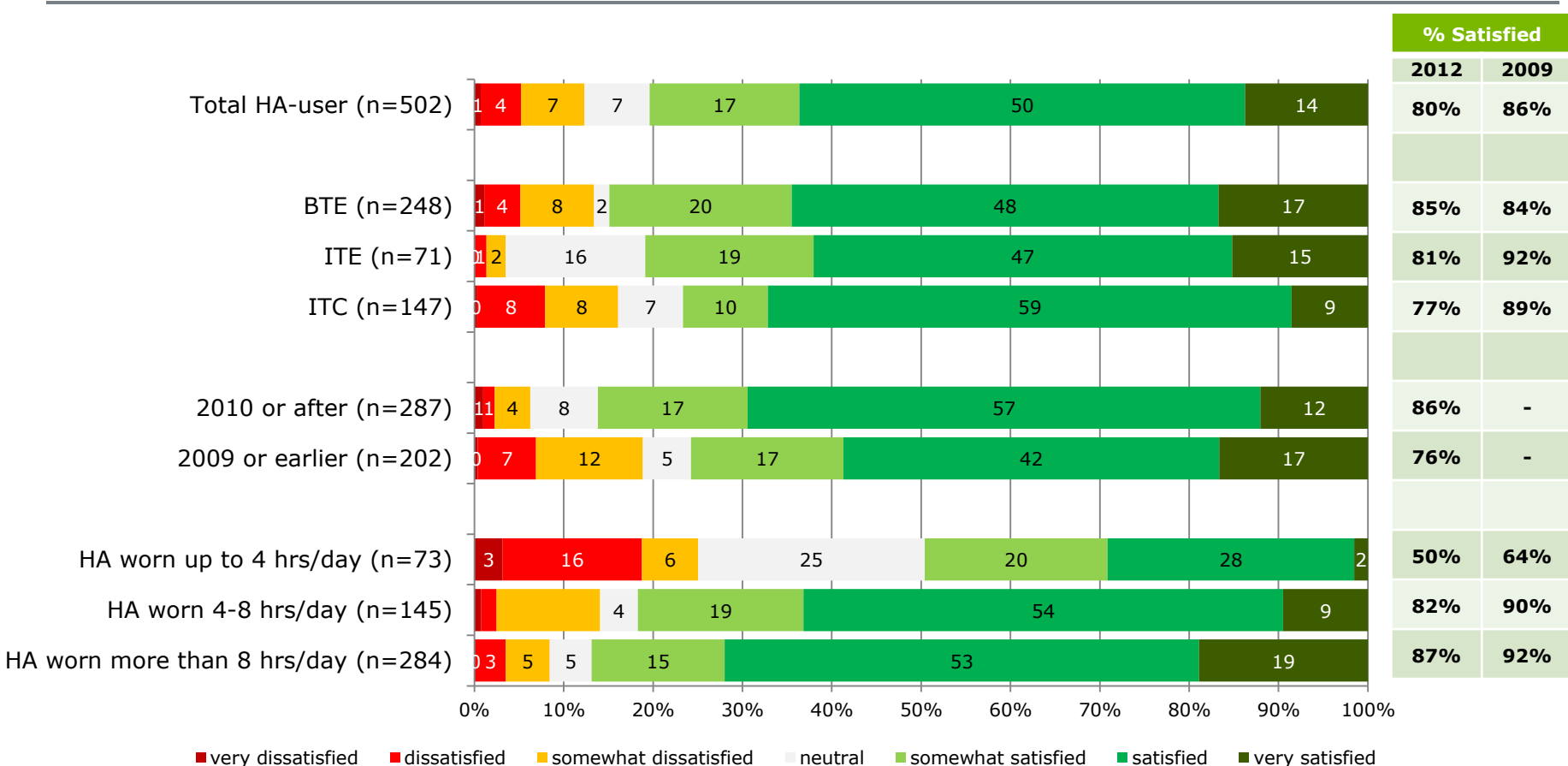
Younger HA owners use wireless technology with their HAs more often and it's more important to them

Wireless Technology

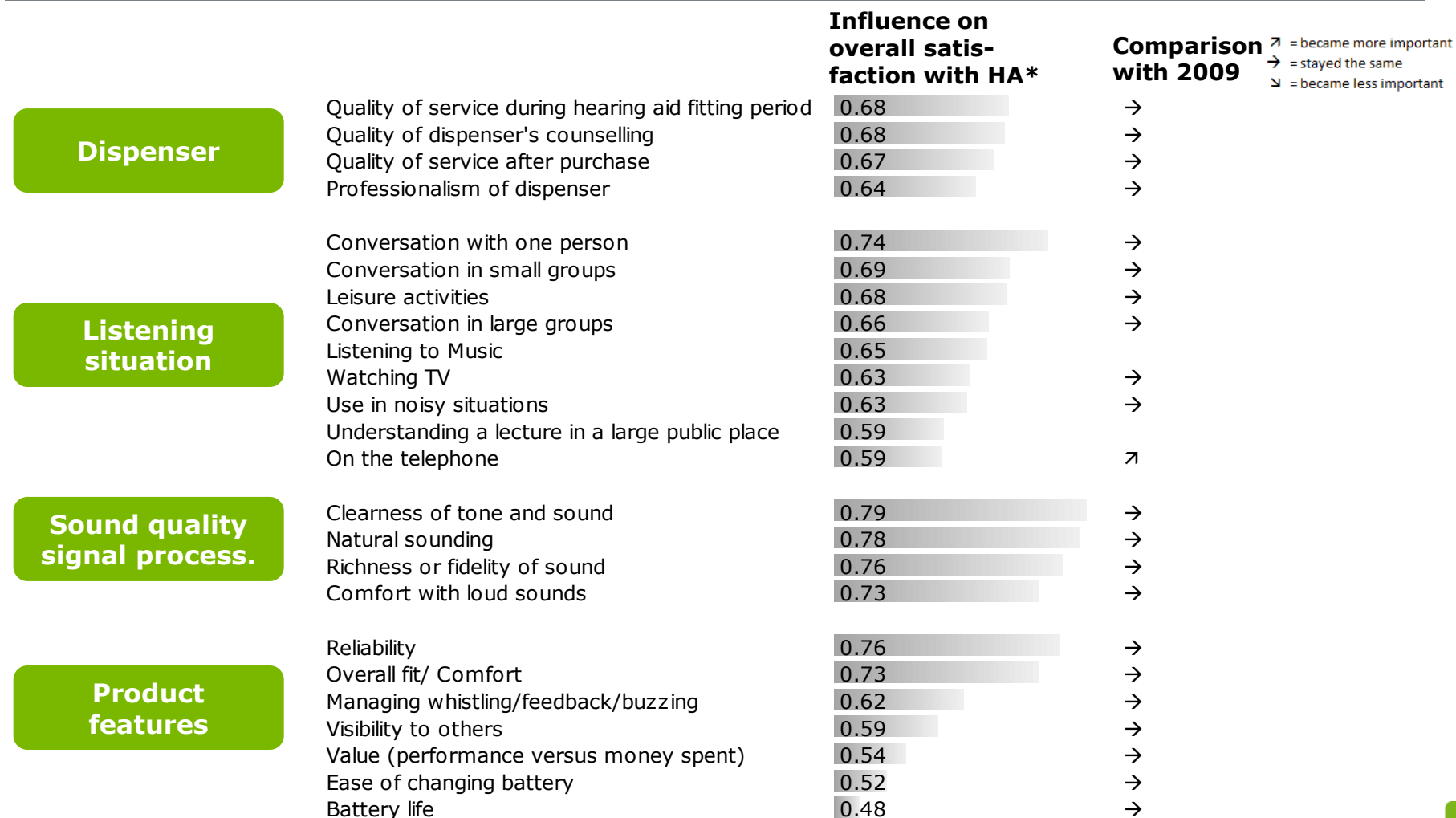


Satisfaction with HA and drivers

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

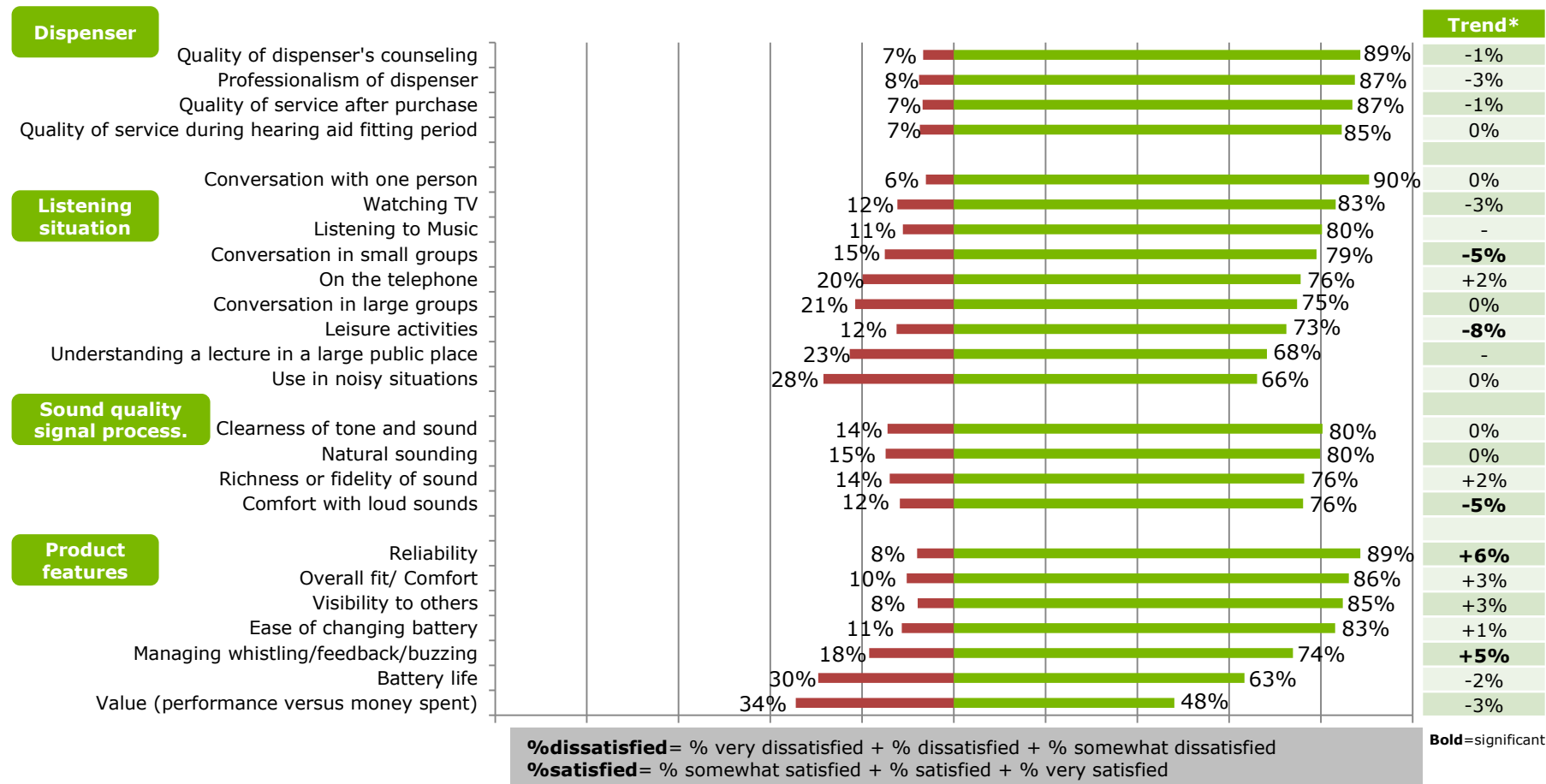


Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA



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

Satisfaction with current HA

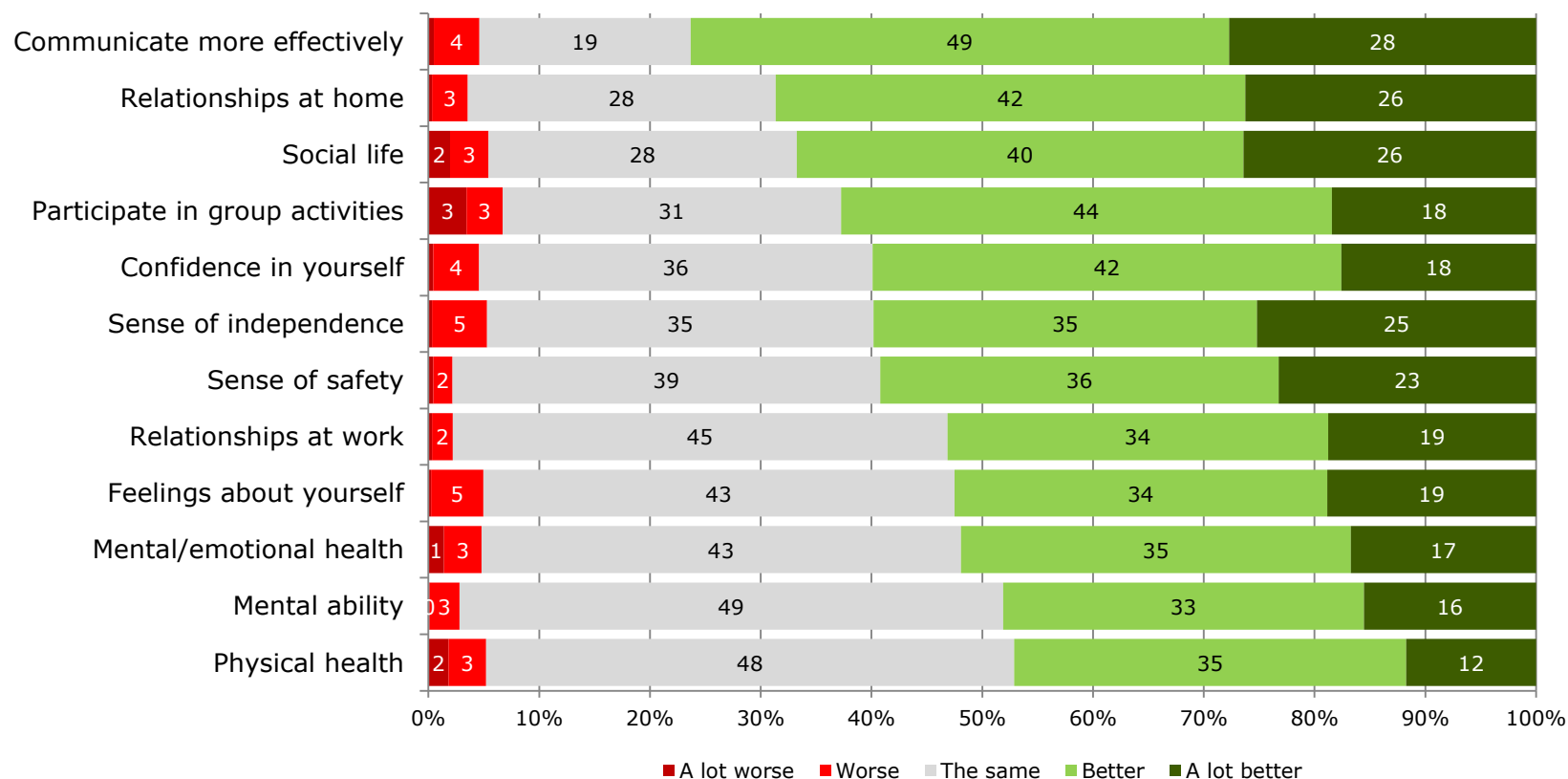


* % of satisfied HA owners compared to EuroTrak 2009

HA-owner, n=502

Positive impact of HAs

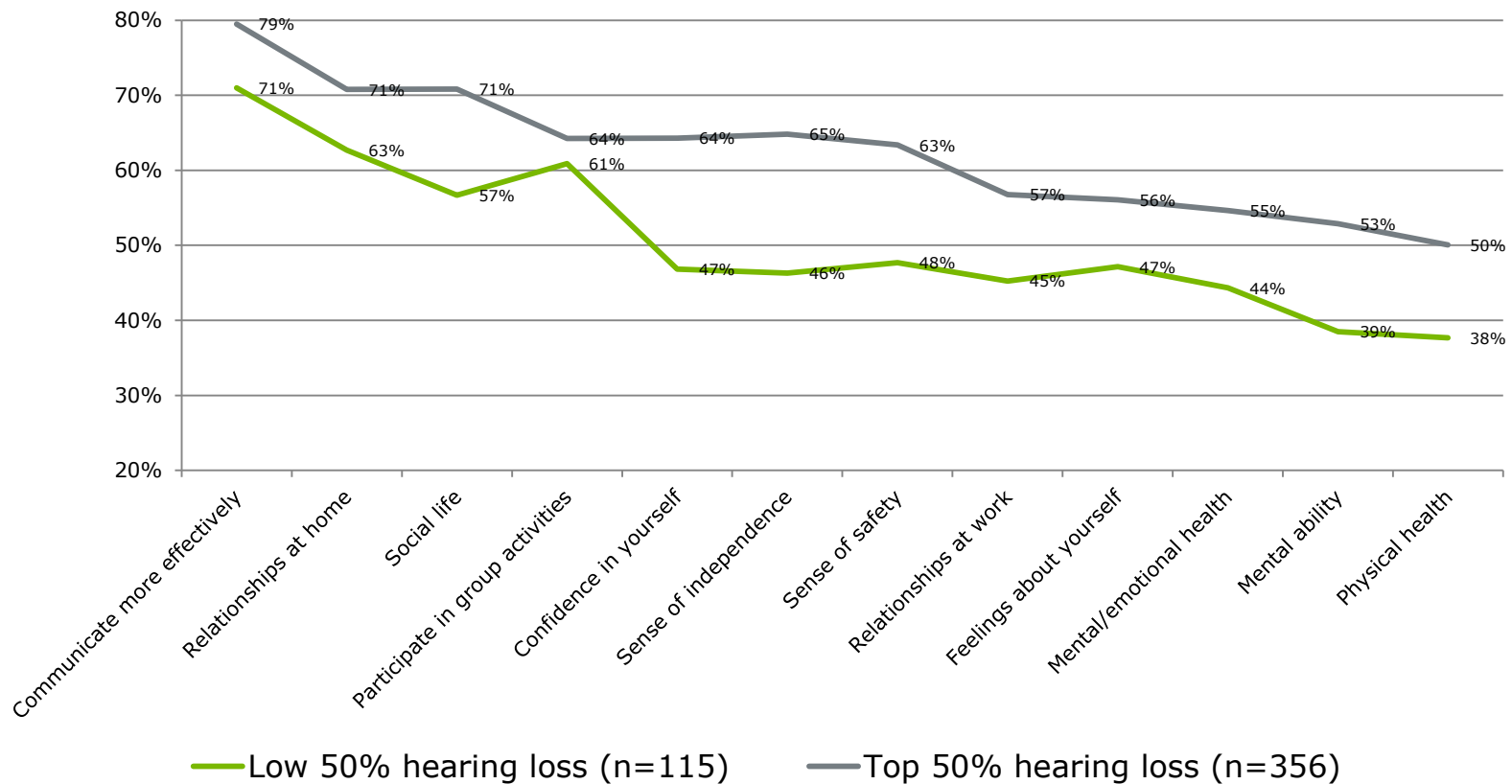
Significant positive impact of HAs on different aspects – especially communication effectiveness, relationship at home and social life have improved



HA-owner, n=502

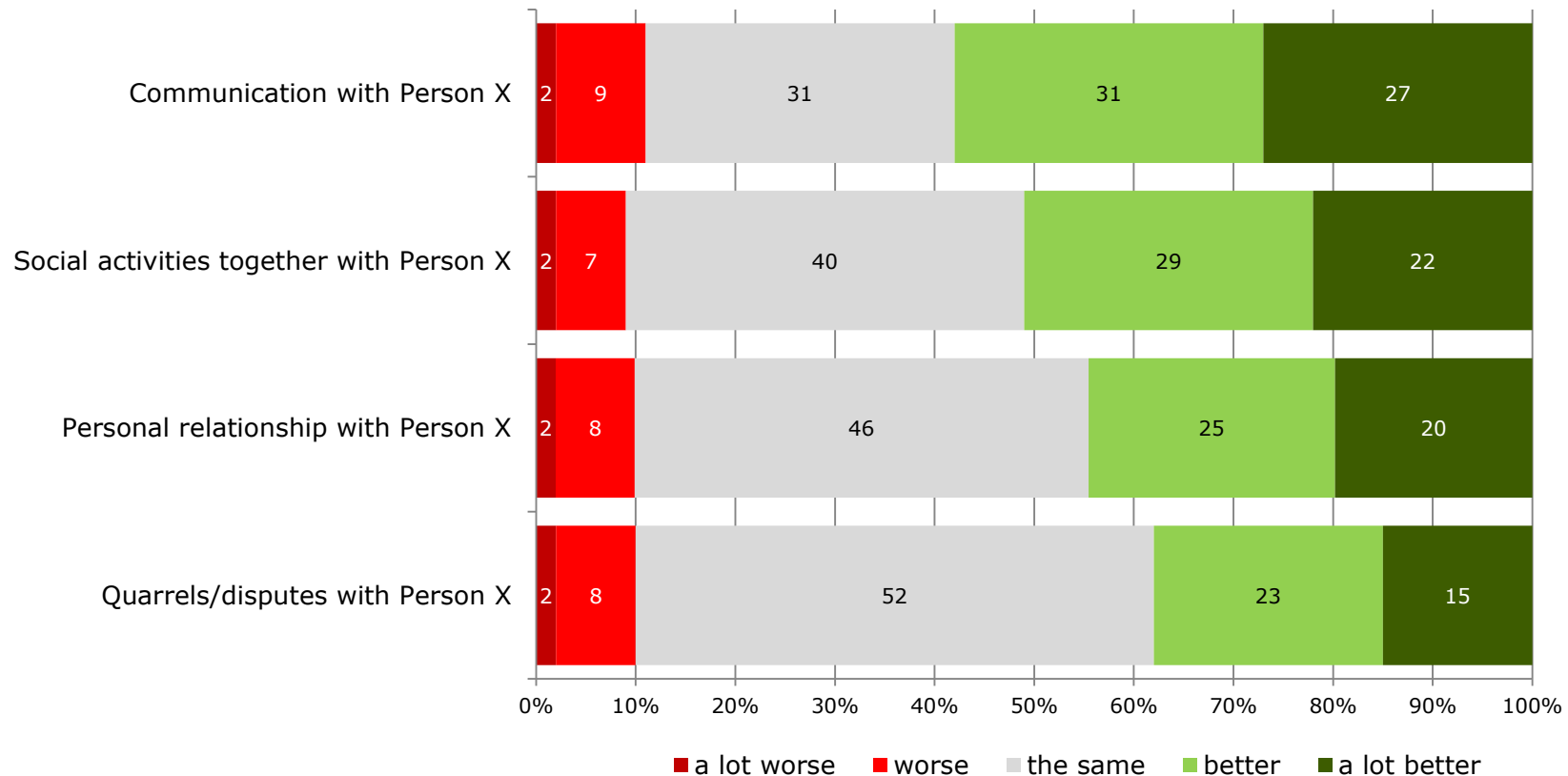
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

% of HA owners feeling better/a lot better



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=579

4. Analysis of hearing impaired non-owners

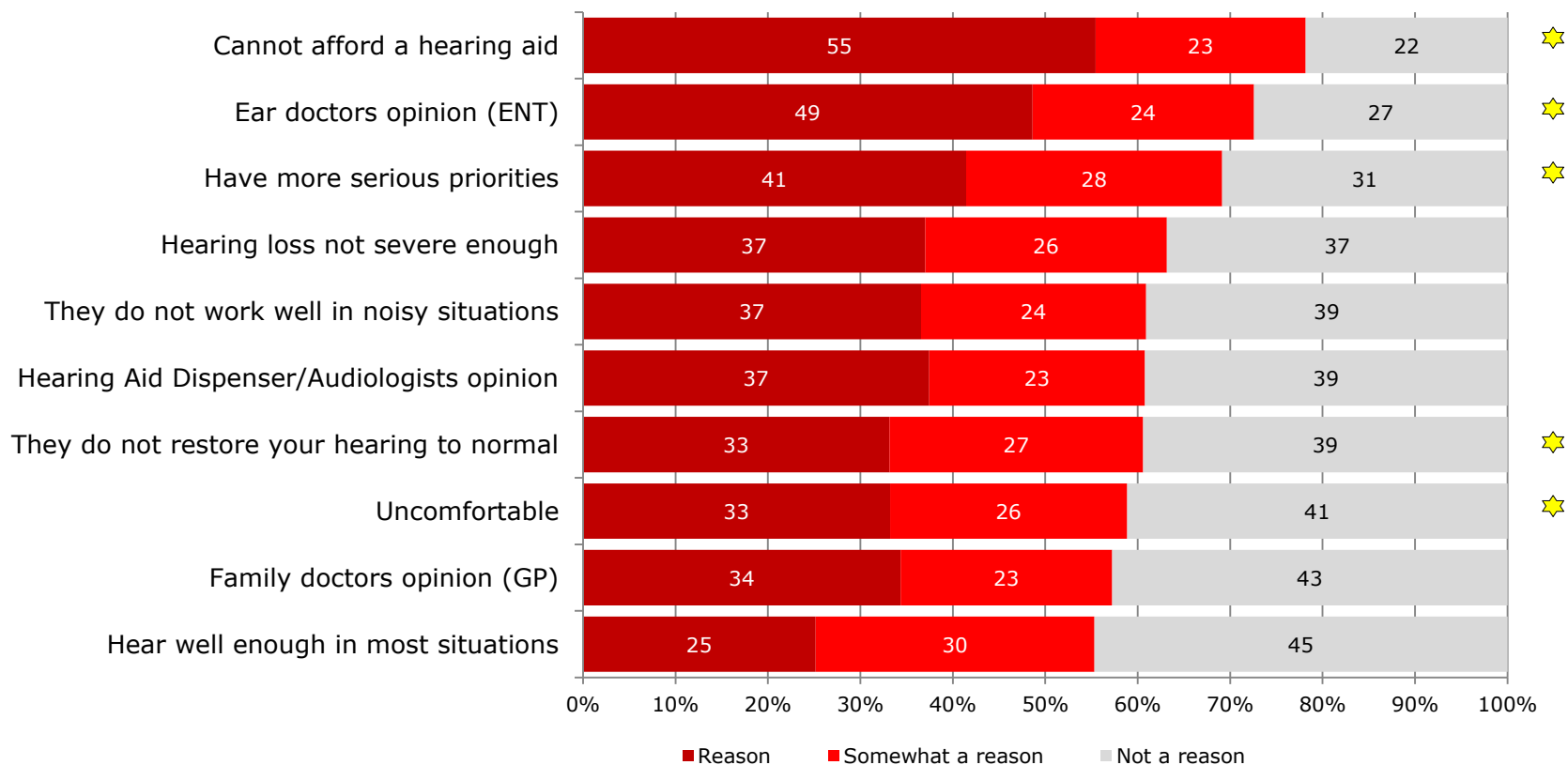
Reasons for not having a hearing aid

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=502)	%HA-Non- owner Low 50% HL	%HA-Non- owner Top 50% HL
Ears impaired			
Unilateral loss	24%	47%	30%
Bilateral loss	76%	53%	70%
		More similar hearing loss- structure	
Perceived loss			
Mild	5%	38%	3%
Moderate	47%	58%	53%
Severe	39%	3%	36%
Profound	9%	1%	8%

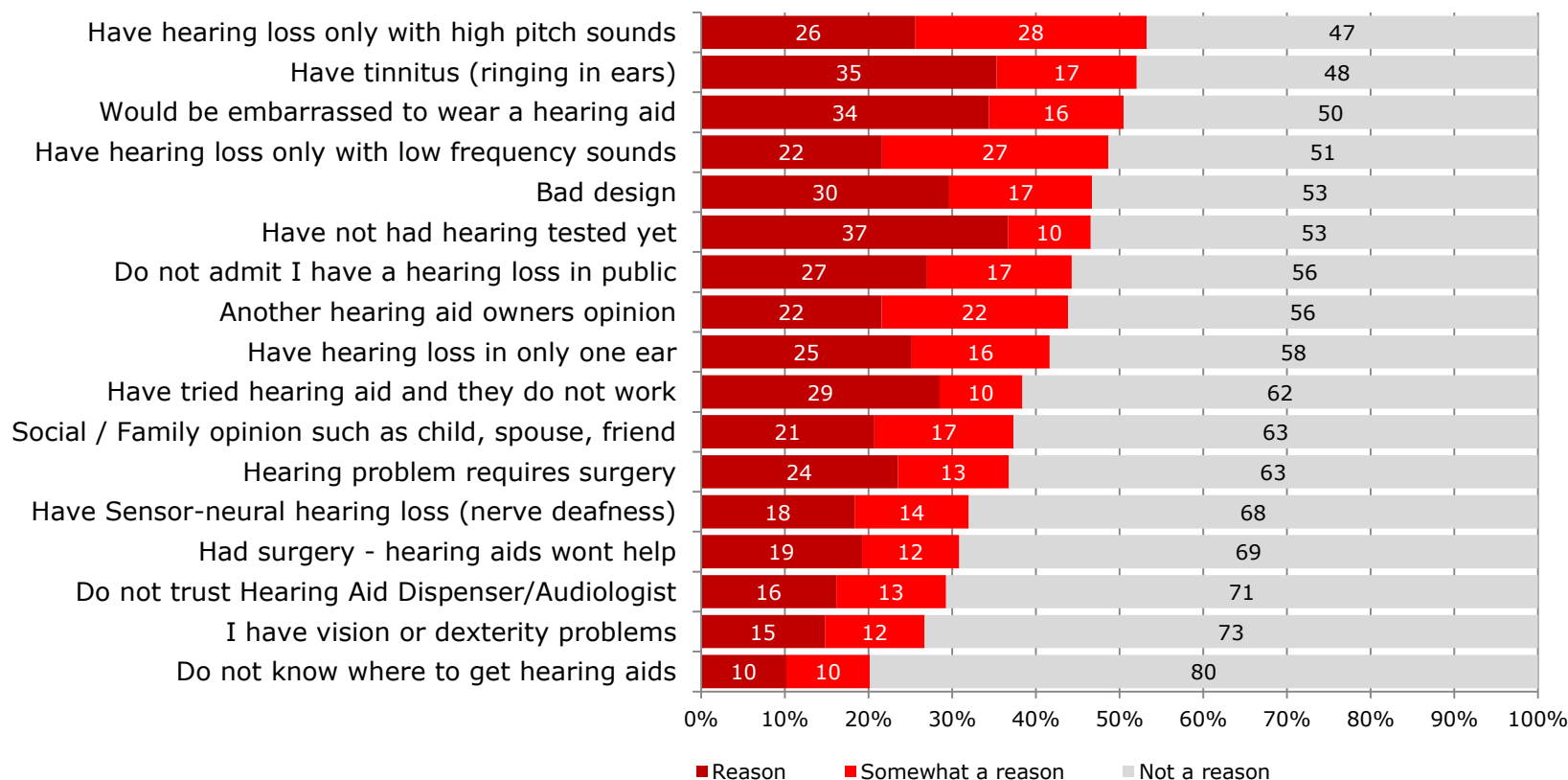
Top 10 reasons for not having a hearing aid (I/II)



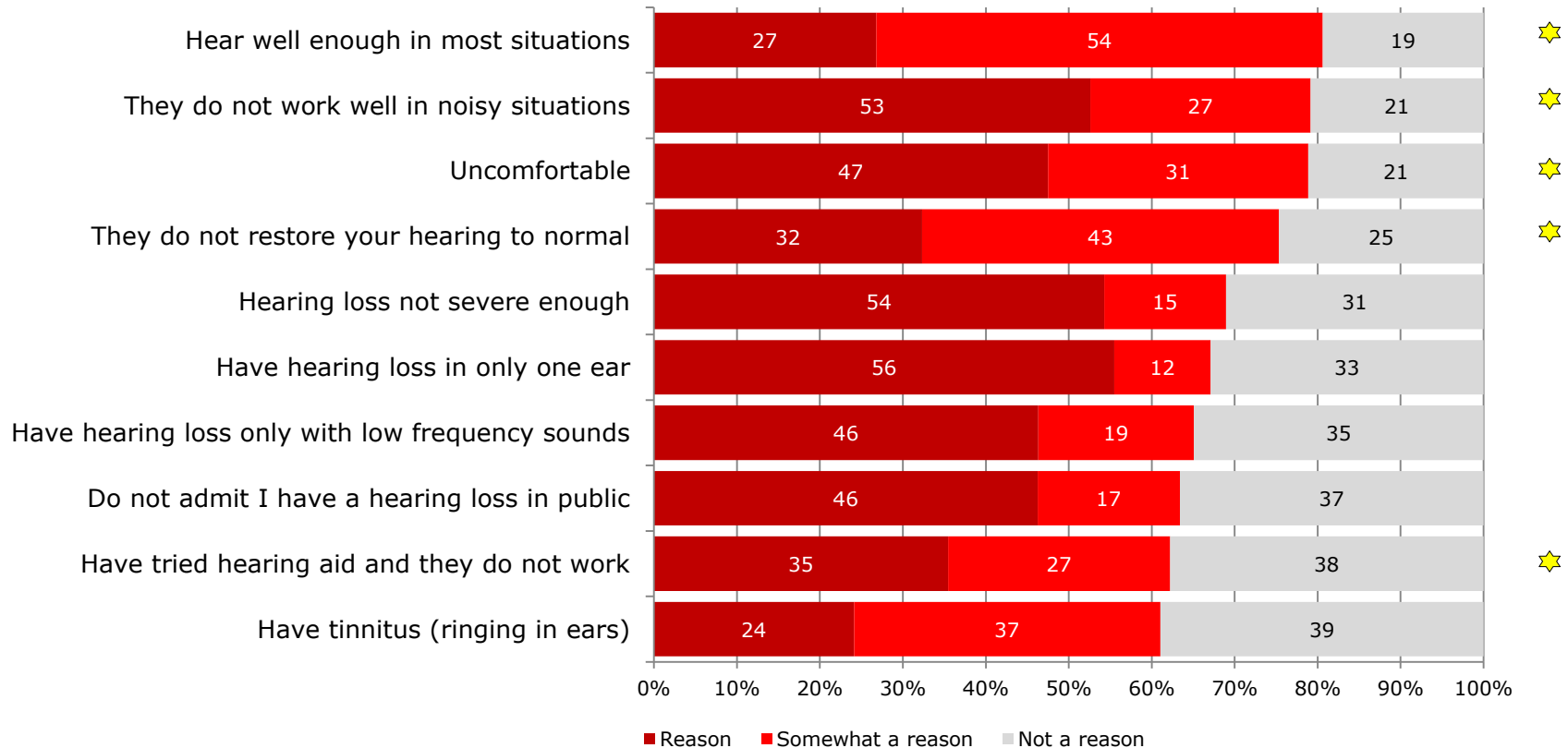
★ =Top 5 reasons EuroTrak 2009

Base: non owners Top 50% HL: n=249

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



Top 10 reasons for HA owners NOT using them



★ =Top 5 reasons EuroTrak 2009

Owners who don't use, n=21

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

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

In the evenings I often feel
physically exhausted

Hearing aid



Top 50% hearing loss, no hearing aid

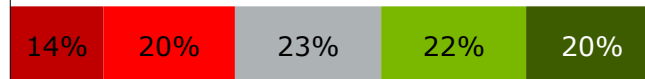


In the evenings I often feel
mentally exhausted

Hearing aid



Top 50% hearing loss, no hearing aid



Base : Top 50% n=244 / hearing aid n=490

*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:

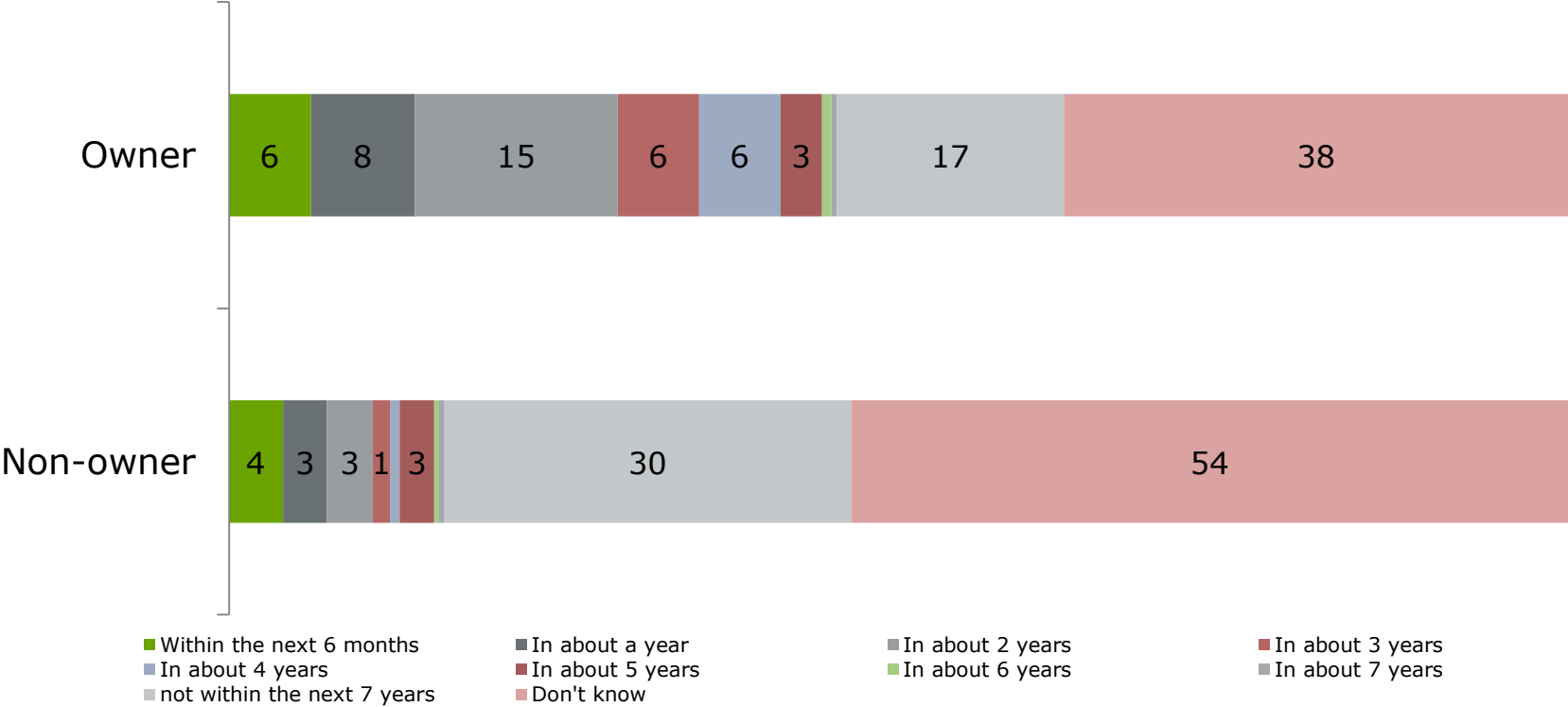
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC - like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

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

Buying intentions

7% 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 %



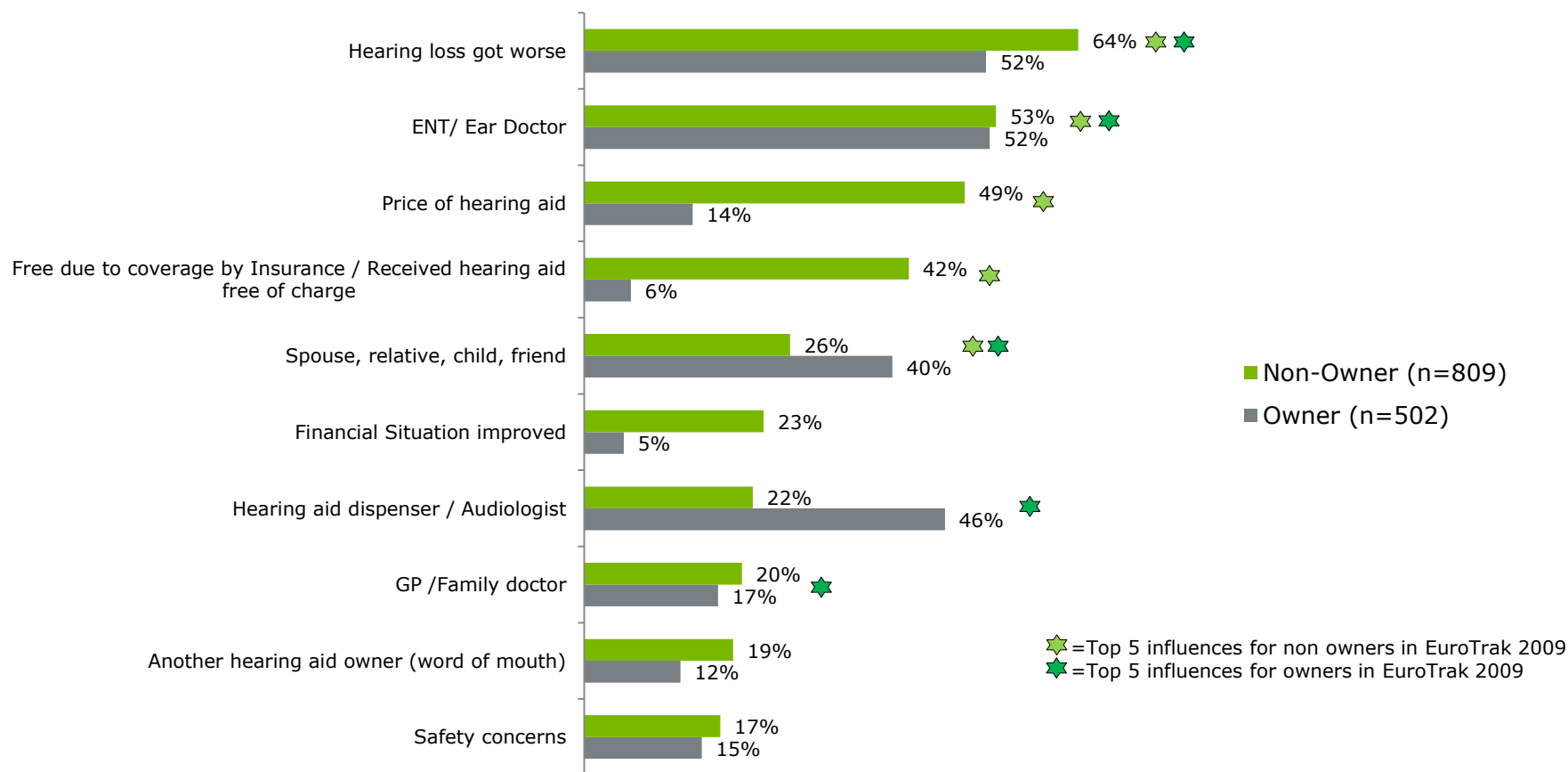
HA-non-owner, n=809
HA-owner, n=502



The most important influencing factors are worsening of hearing, ENT, significant others and audiologist (for owners). Costs are also important, but only 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: 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	7476	10.9%	28.2%		47.9%	54.9%	49.6%
	Female	7954	8.9%	32.8%		52.1%	45.1%	50.4%
Age recoded								
	1 - 14	2831	1.9%	28.2%		19.9%	3.2%	2.9%
	15 - 24	1887	3.4%	20.7%		13.1%	4.8%	2.9%
	25 - 34	1909	5.3%	24.0%		13.0%	6.9%	5.0%
	35 - 44	2064	6.0%	23.1%		14.0%	8.7%	5.9%
	45 - 54	2094	8.9%	18.3%		13.7%	14.9%	7.7%
	55 - 64	1973	12.8%	23.3%		12.3%	18.9%	13.2%
	65 - 74	1269	18.9%	34.4%		7.4%	15.0%	18.0%
	74+	1403	35.5%	41.3%		6.7%	27.6%	44.4%
Type of household								
	single household	1479	16.2%	32.8%		8.9%	15.3%	17.0%
	Couple, no kids	4337	14.5%	32.4%		26.7%	40.7%	44.8%
	Couple with kid(s)	7756	5.6%	24.6%		52.5%	30.6%	22.9%
	Single mom/dad with kid(s)	850	6.2%	26.5%		5.7%	3.4%	2.8%
	Retirement home, hospital etc.	131	48.3%	32.4%		0.5%	3.9%	4.3%
	Other	878	12.0%	37.0%		5.6%	6.1%	8.2%

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)	6646	14.8%	29.9%	41.2%	67.8%	66.7%
The spouse of the head of the household	3923	9.0%	31.9%	25.8%	24.1%	26.0%
Daughter/son of head of household	4419	2.3%	29.2%	31.2%	6.6%	6.2%
Other Person	258	7.5%	24.5%	1.7%	1.5%	1.1%
Employment						
Full time employed	5631	7.6%	20.9%	47.3%	33.1%	19.9%
Part time employed	885	6.5%	13.9%	7.5%	4.8%	1.8%
Unemployed / not working	1237	8.0%	23.0%	10.3%	7.5%	5.1%
Retired under a disability pension scheme (fully or partly)	221	25.3%	36.6%	1.5%	3.4%	4.5%
Early retired under an early retirement benefit scheme	287	18.5%	27.4%	2.1%	3.8%	3.3%
Retired (at the official retirement age)	3106	23.9%	38.4%	21.7%	45.0%	64.0%
Student / pupil / in training	1070	2.7%	20.2%	9.4%	2.3%	1.4%
Education						
Brevet	1558	16.9%	32.5%	11.9%	17.3%	19.0%
CAP-BEP	2942	14.7%	32.0%	22.9%	29.1%	31.3%
Baccalauréats	2483	8.6%	26.4%	20.7%	15.2%	12.4%
BTS - DUT	1589	7.2%	24.1%	13.4%	8.3%	6.0%
License (BAC+3)	1292	8.5%	26.4%	10.7%	8.2%	6.7%
Master 1 et 2 - Diplôme d'Ingénieur	1256	8.6%	32.3%	10.4%	7.1%	7.8%
Doctorat	237	12.2%	35.1%	1.9%	1.8%	2.2%
Autre	1082	18.0%	32.8%	8.1%	13.0%	14.5%