

EuroTrak: New survey of the market for hearing aids in Germany, France and the U.K.

First globally comparative study of hearing, hearing loss and hearing aids



Agenda

1. Background and Methodology

2. Market overview

3. Hearing aid owners

4. Hearing impaired non-owners

EuroTrak: Background & Ambition






- **MarkeTrak** surveys (USA): >20 years history
- **EuroTrak** is the European equivalent to MarkeTrak
- **Combining MarkeTrak and EuroTrak**: first globally comparative study. Yields a core data set which can be used internationally. A new standard for hearing healthcare surveys.



- Designed and executed by Anovum on behalf of EHIMA

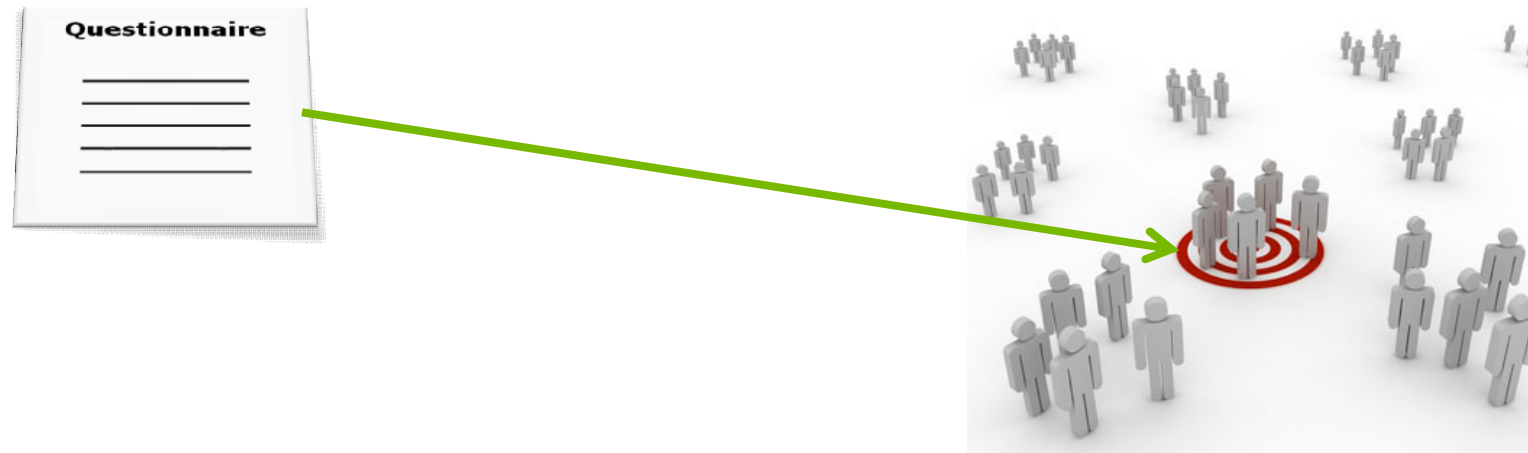
About EHIMA



- The European Hearing Instrument Manufacturers Association (EHIMA) was founded in 1985 and represents the six major European hearing instrument manufacturers, producing up to 90% of hearing aids made in Europe.
- The members of EHIMA are:      
- Secretary General of EHIMA: Soeren Hougaard
1984 – 2002: marketing manager, Widex Denmark
2002 – 2009: managing director, Phonak Denmark
2009 – ? : secretary general, EHIMA



Gathering information about the Market based on interviews with target groups



Data collection: In search of hearing impaired people for the interviews

Step 1: Representative sample

Target group: General population

Objective: **Prevalence** of hearing loss and hearing aid ownership

Step 2: Interviews with hearing impaired

Target groups:

- Hearing impaired (HI) without hearing aid (HA)
- Hearing impaired with hearing aid

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

Same sampling structure and same methodology in all countries



- Sample sizes Germany 2009:
 - Total representative sample: n=14'185 people
 - Total full interviews hearing impaired: n=1'308 people
 - Hearing impaired non-owners: n=805 people with hearing loss (**HL**)
 - HA owners: n=503 people with hearing aid (**HA**)



- Sample sizes France 2009:
 - Total representative sample: n=15'545 people
 - Total hearing impaired: n=1'304 people
 - Hearing impaired non-owners: n=803 people with hearing loss (**HL**)
 - HA owners: n=501 people with hearing aid (**HA**)



- Sample sizes UK 2009:
 - Total representative sample: n=14'980 people
 - Total hearing impaired: n=1'335 people
 - Hearing impaired non-owners: n=822 people with hearing loss (**HL**)
 - HA owners: n=513 people with hearing aid (**HA**)



- Sample sizes USA 2008
 - Total representative sample: n= 46'843 people
 - Total hearing impaired: n= 5'713 people
 - Hearing impaired non-owners: n= 4'339 people with hearing loss (**HL**)
 - HA owners: n= 3'174 people with hearing loss (**HA**)

New standard for hearing healthcare surveys



EUROPE:

Total representative sample: 44'710

Total number of hearing impaired: 3'947

Total number of HA owners: 1'517



Never before were so many people interviewed in such great detail about these topics.



- Sample sizes USA 2008

- Total representative sample: n= 46'843 people
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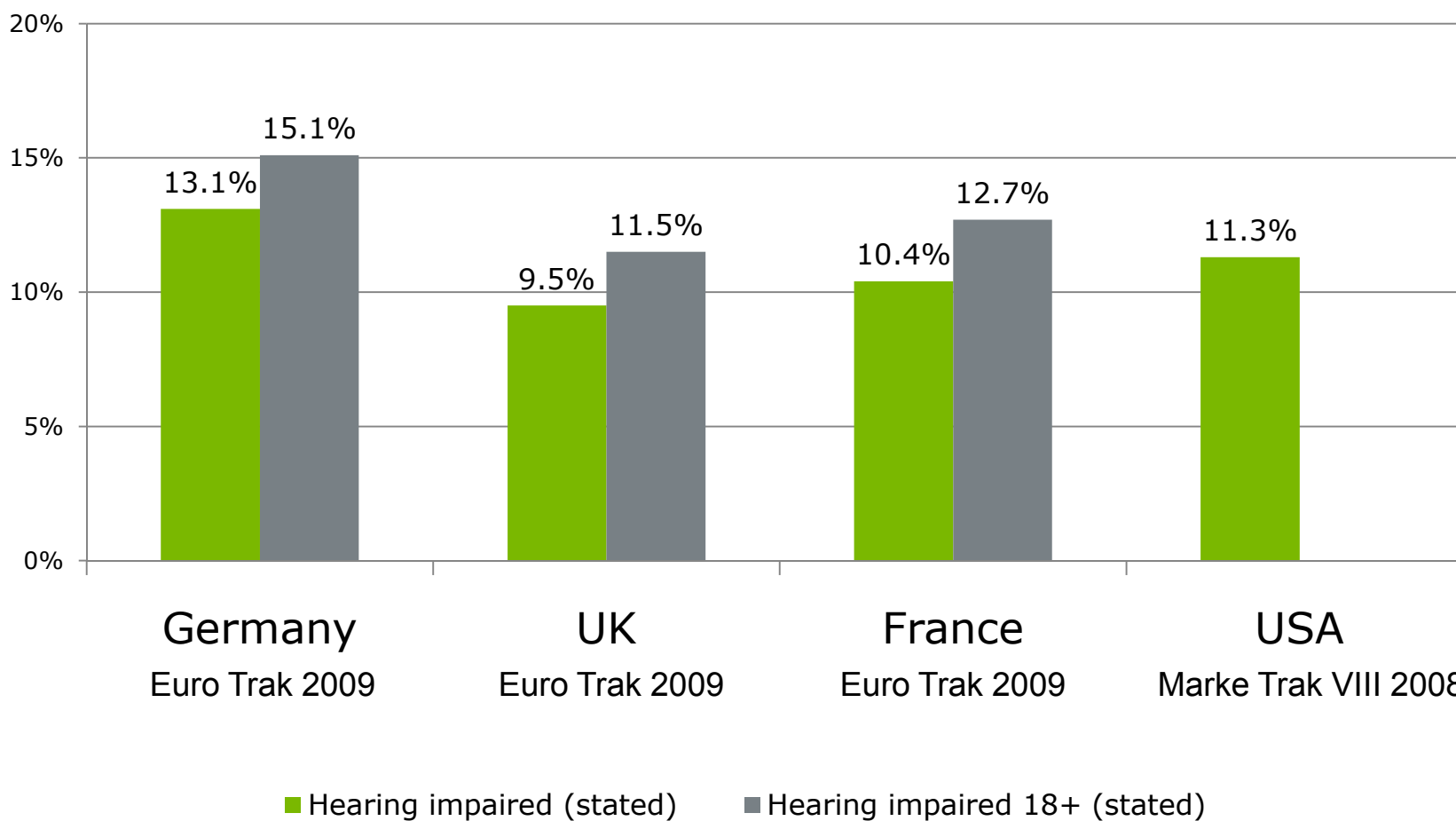
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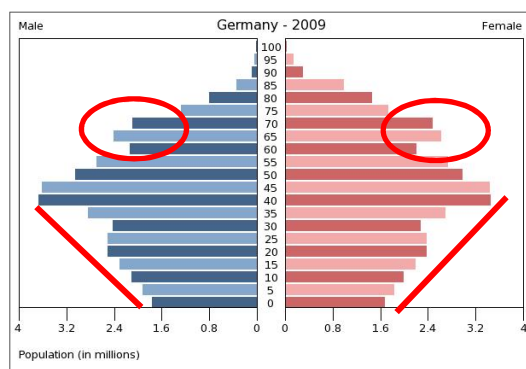
3. Hearing aid owners

4. Hearing impaired non-owners

Hearing loss prevalence

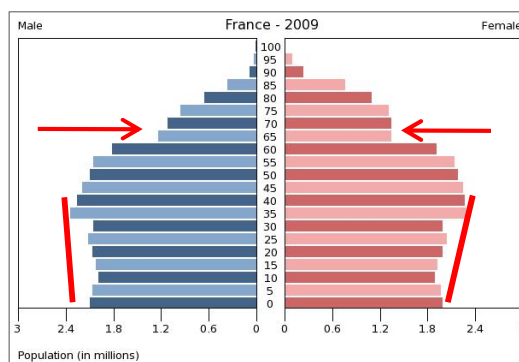


Demographic differences: The population in Germany is older. Older people tend to suffer more frequently from hearing loss.



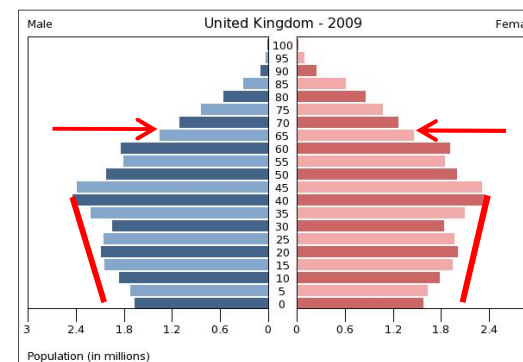
Download selected pyramid data as: [Excel](#) | [CSV](#)

Source: [U.S. Census Bureau, International Data Base](#).



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Source: [U.S. Census Bureau, International Data Base](#).

Source: US Census Bureau



Stated vs measured



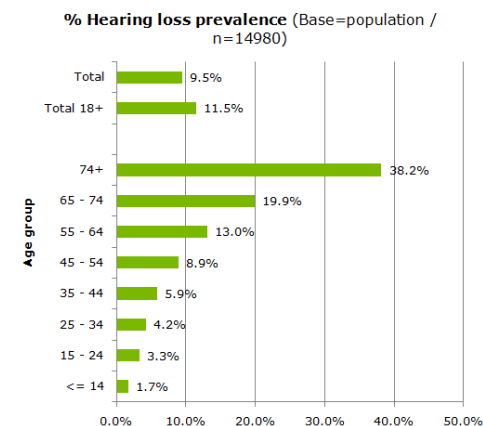
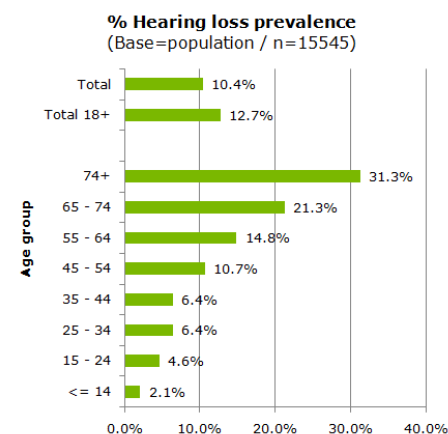
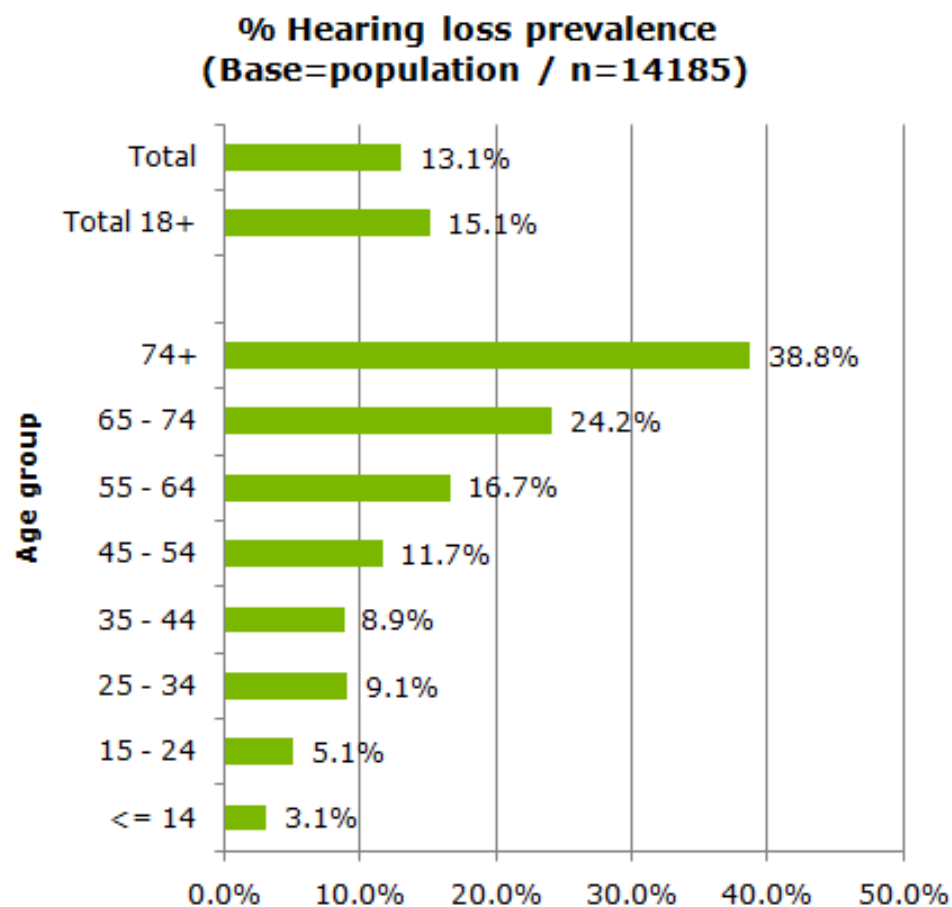
Important: Stated is not measured HL!

→ Many factors that can influence stated hearing loss

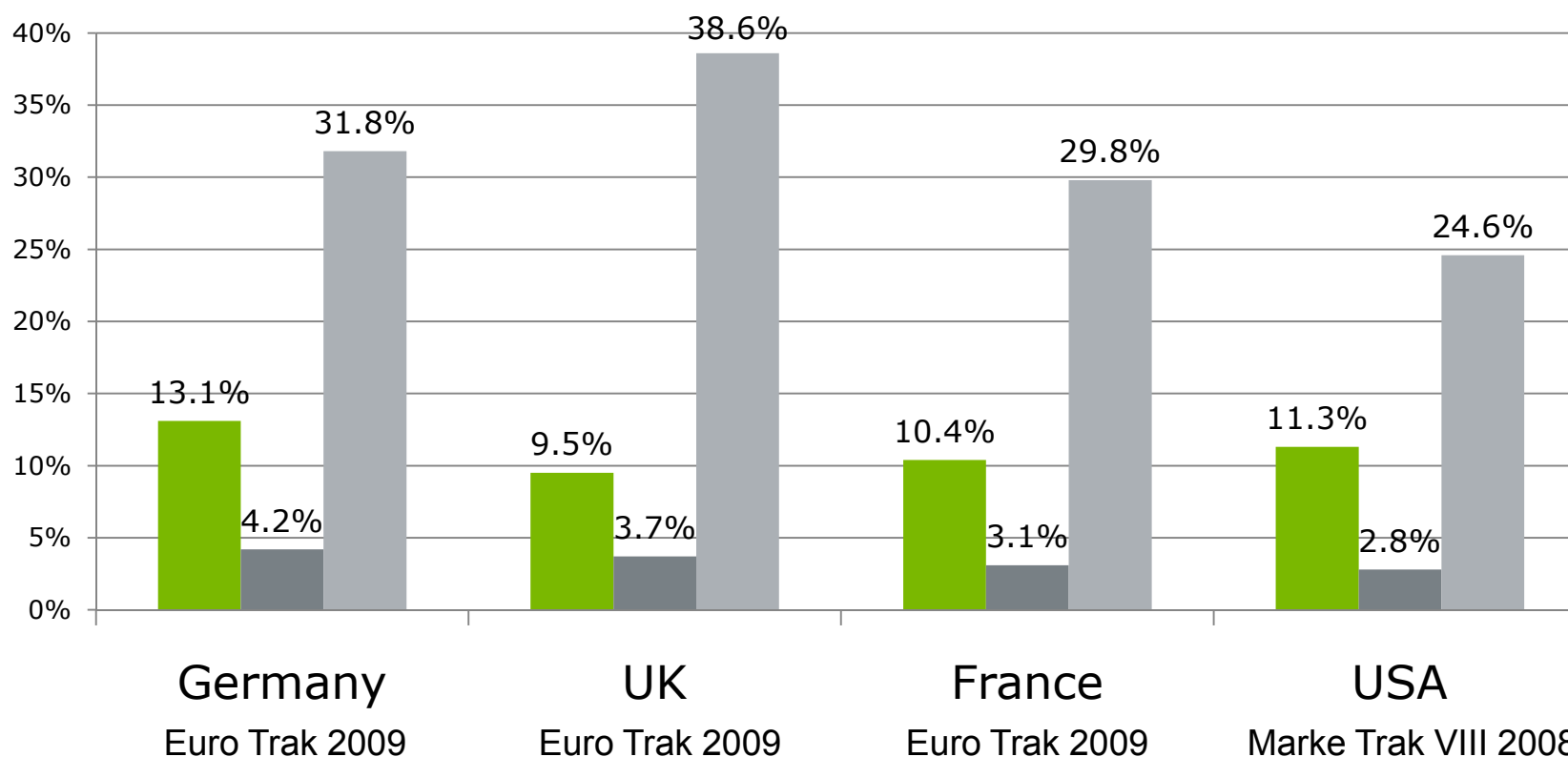
→ German Green Cross 1985: measured = 27%



Hearing loss prevalence 2009



Hearing loss prevalence and hearing aid adoption



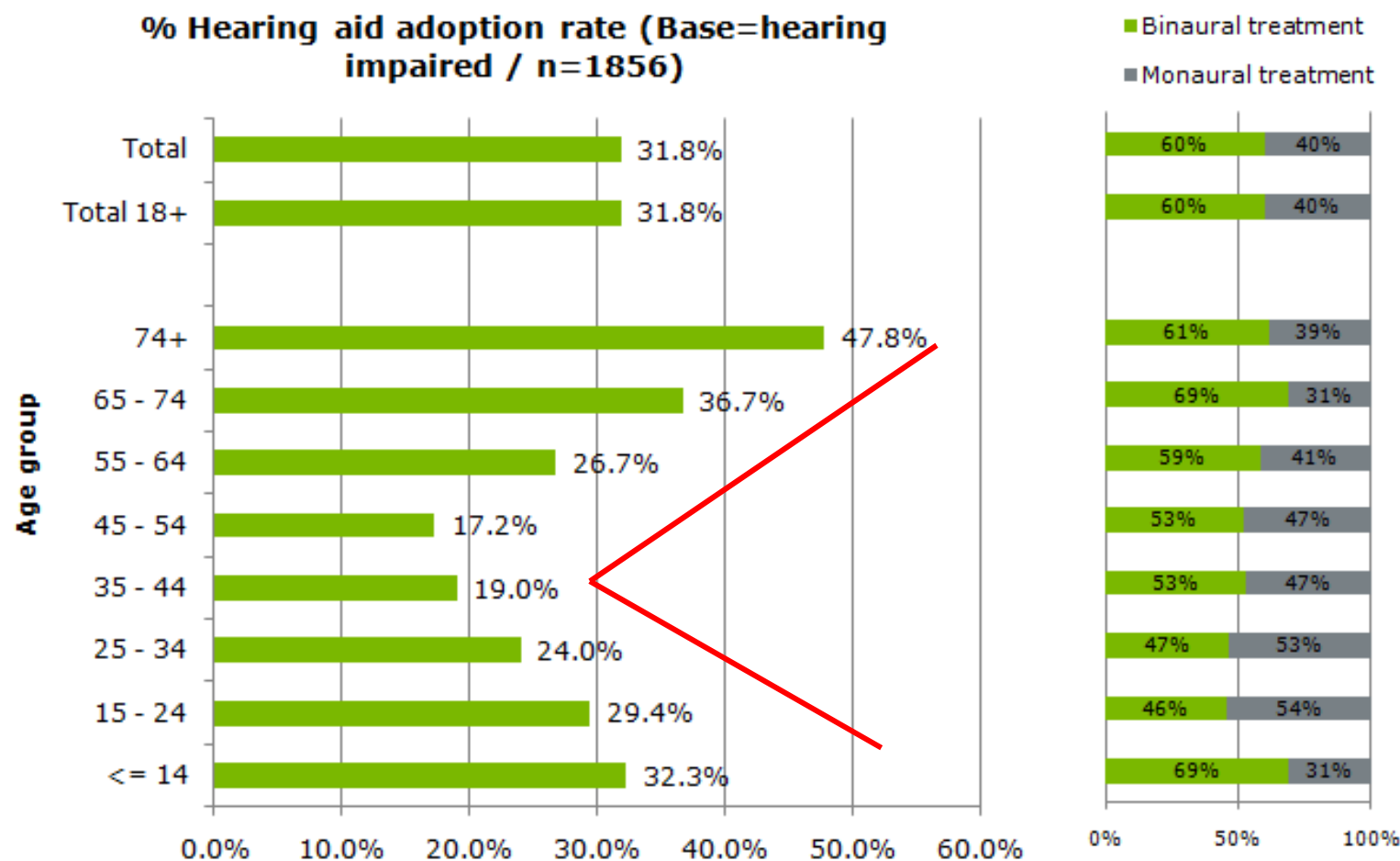
■ Hearing impaired (stated) ■ Adoption (% of population) ■ Adoption (% of stated impaired)



Hearing aid adoption rate 2009

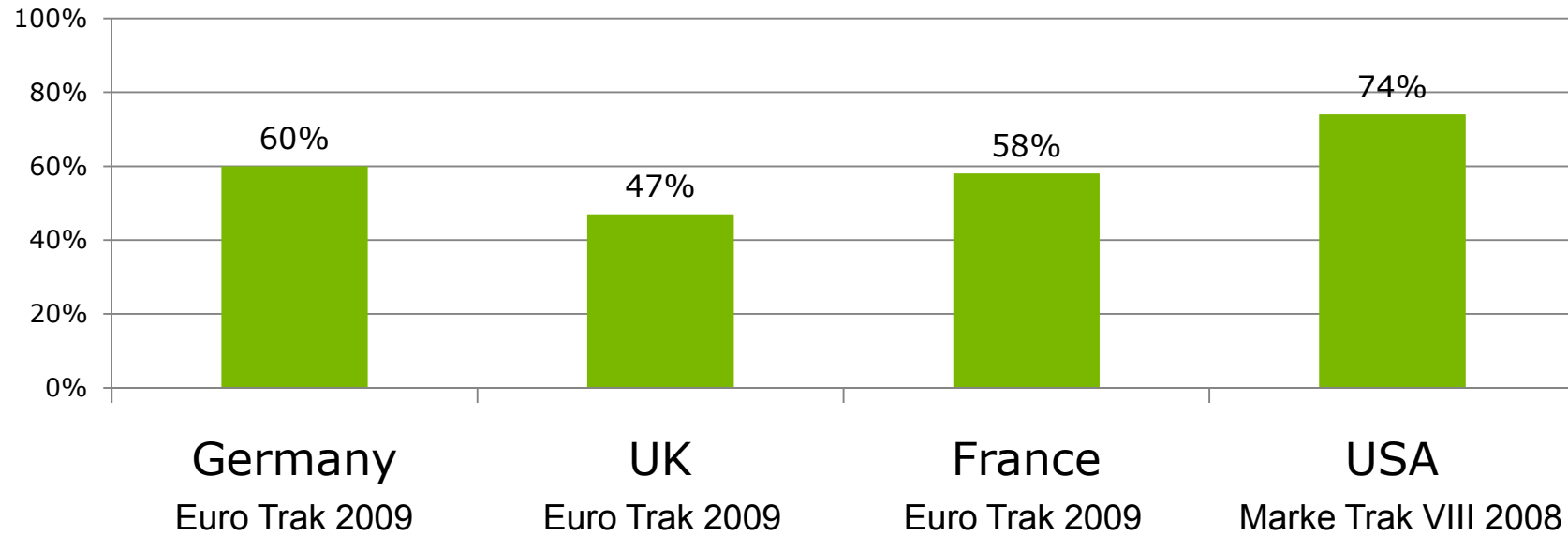
Total adoption rate is 31.8%

Example: 



Base: n= 550 (HA owners)

Binaural rate



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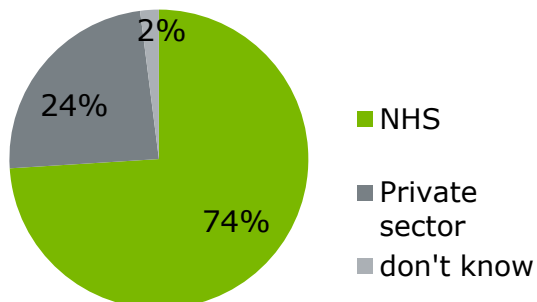
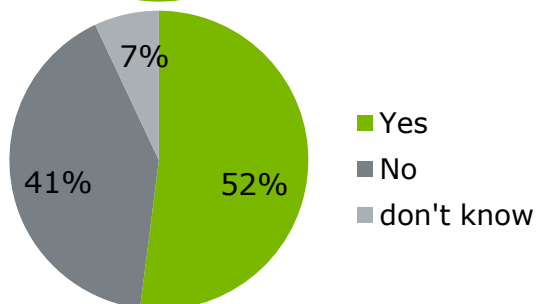
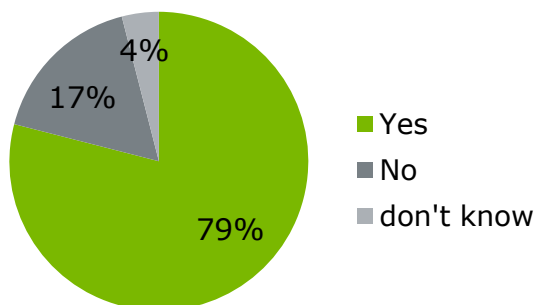
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3rd party payment

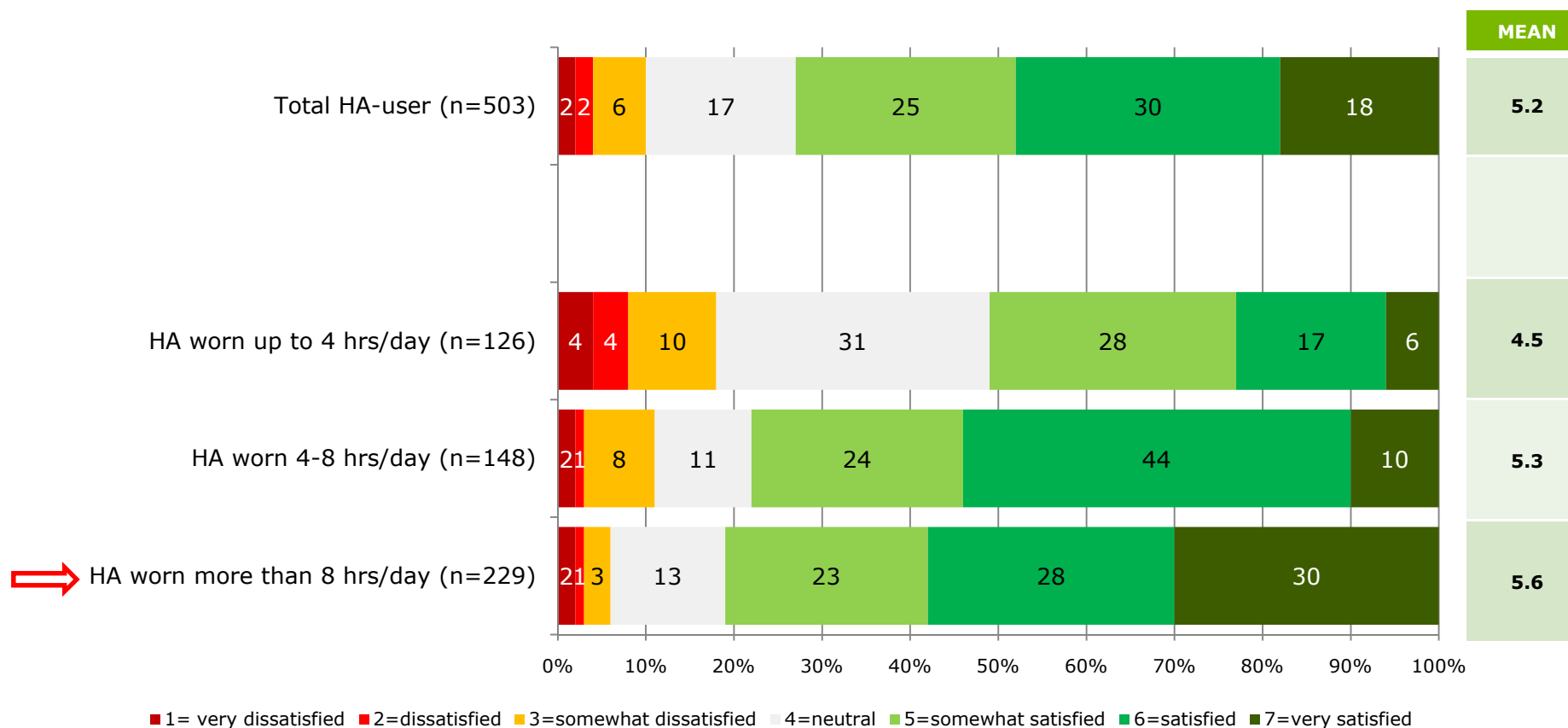
Owners: : Was any part or all of your hearing aid(s) paid for by a third party ? (Insurance, Government, ...)



Overall satisfaction with HA: The more hours worn, the higher the satisfaction.



Example: 



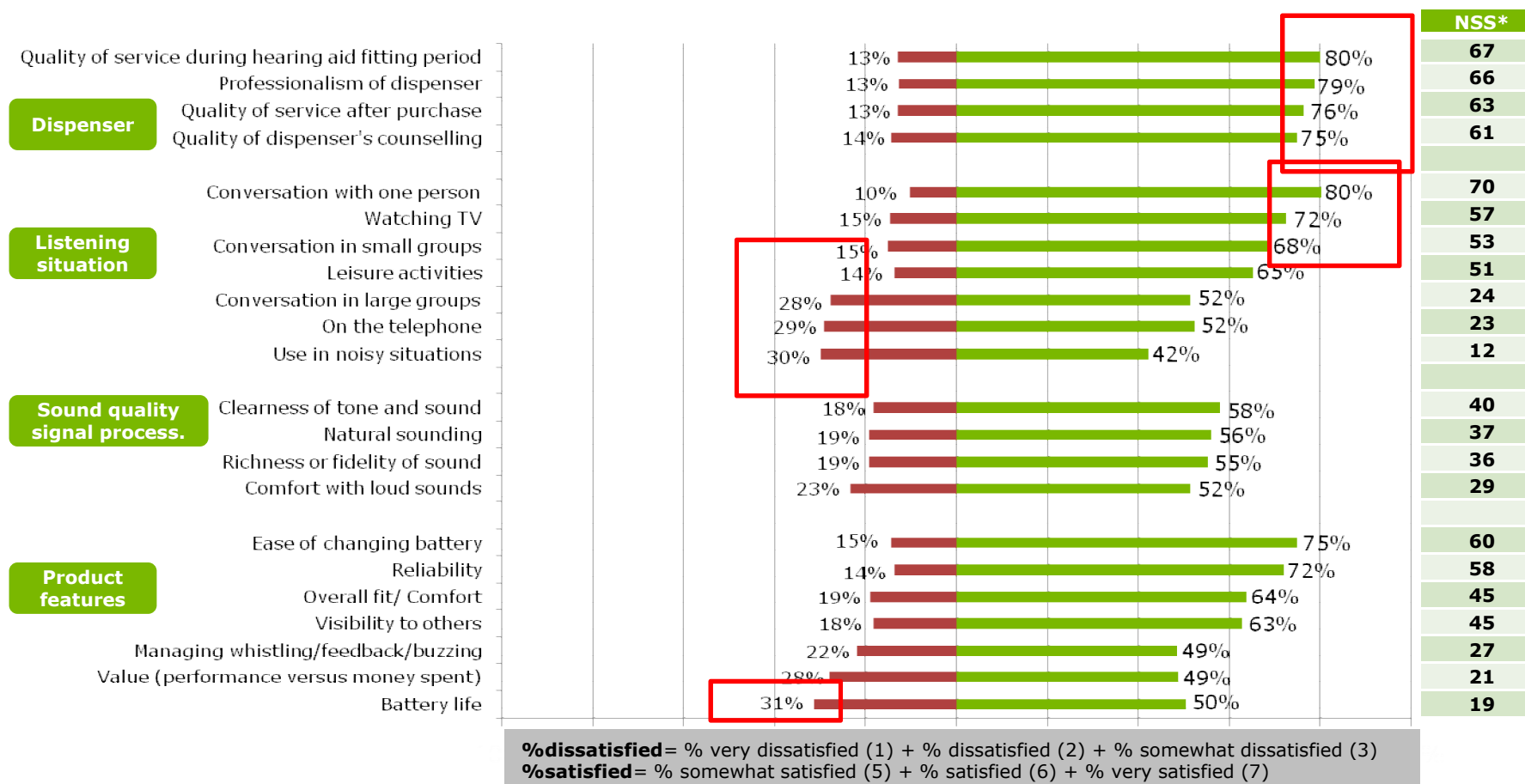
HA-owner, n=503



Satisfaction with current HA: Highly satisfied with dispensers. Still a challenge: Difficult listening situations



Example: 



*NSS= Net Satisfaction Score (%satisfied – %dissatisfied)

* NSS can differ from showed difference due to rounding

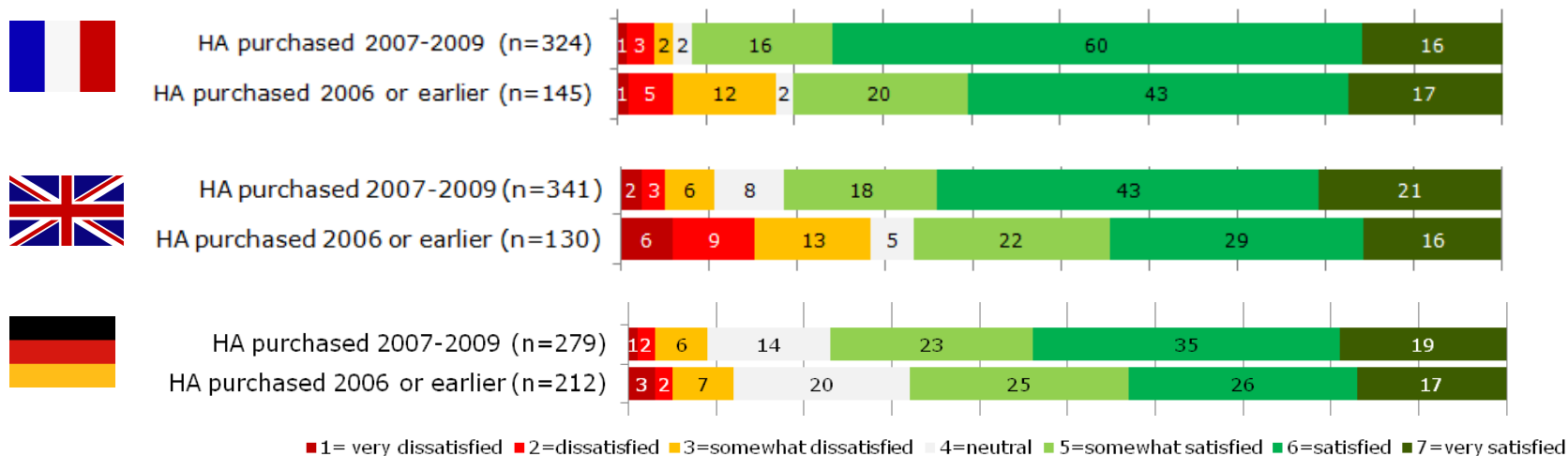
■ dissatisfied ■ satisfied

HA-owner, n=503



New technology makes a difference

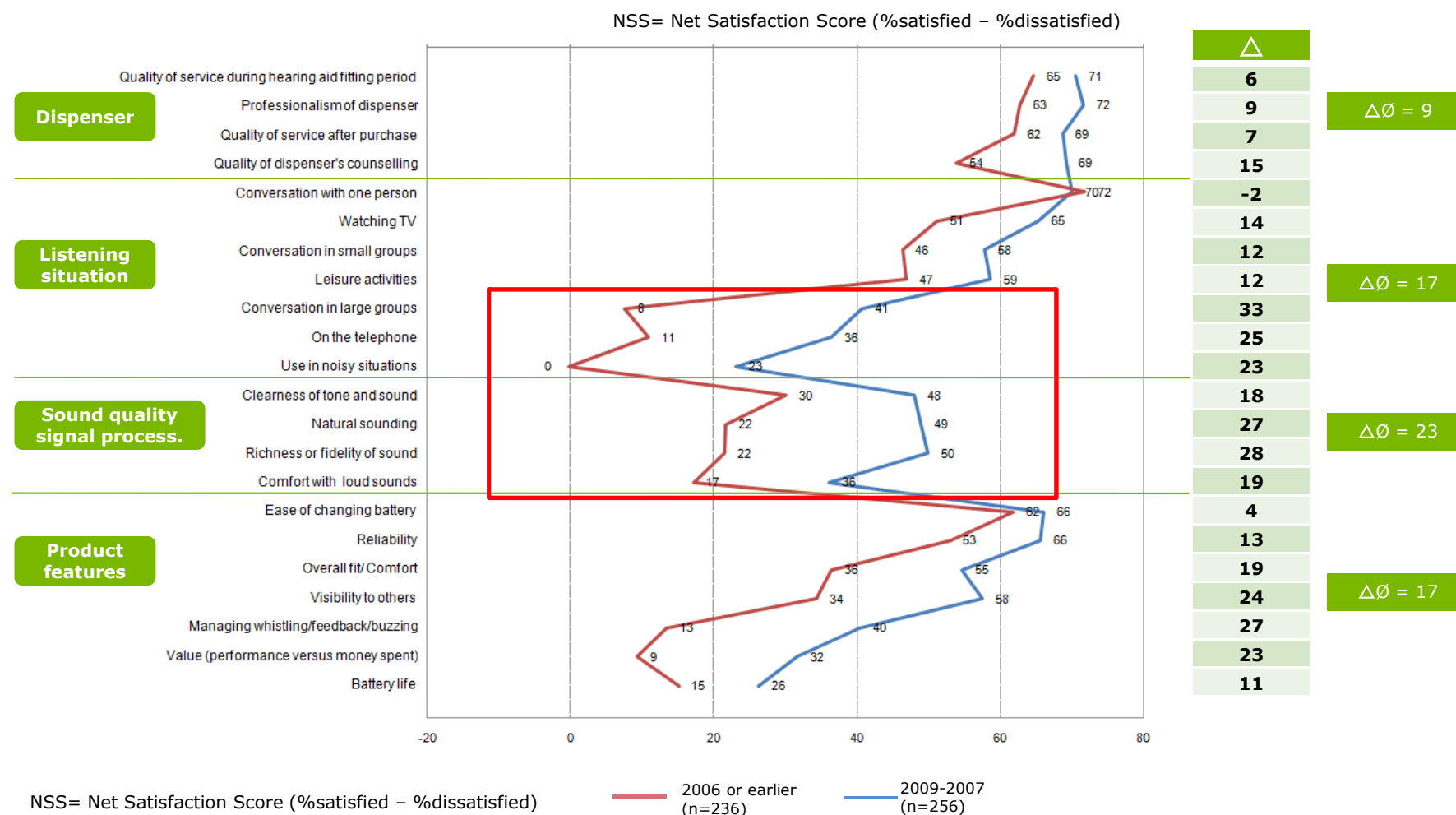
For each country: The newer the HA - the higher the satisfaction



Satisfaction with sound quality and signal processing increased with the new HA generations.



Example: 



Challenges for the future

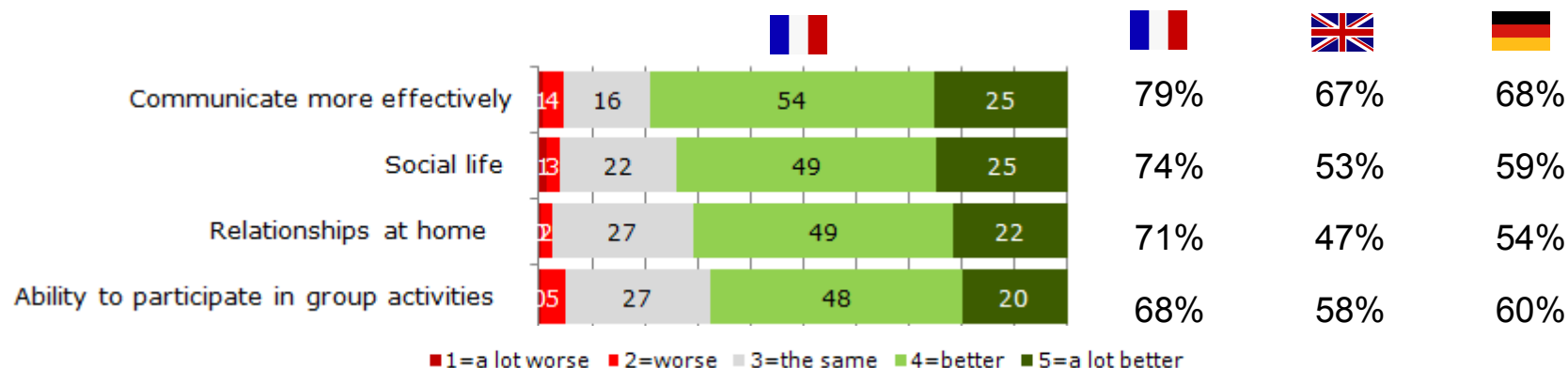
- Listening situations:
 - Use in noisy situations
 - On the phone
 - In large groups
- Product:
 - Battery life (GER, FRA)
 - Value (performance vs. money spent) (GER, FRA)
 - Managing whistling/feedback/buzzing

Positive impact of hearing aids



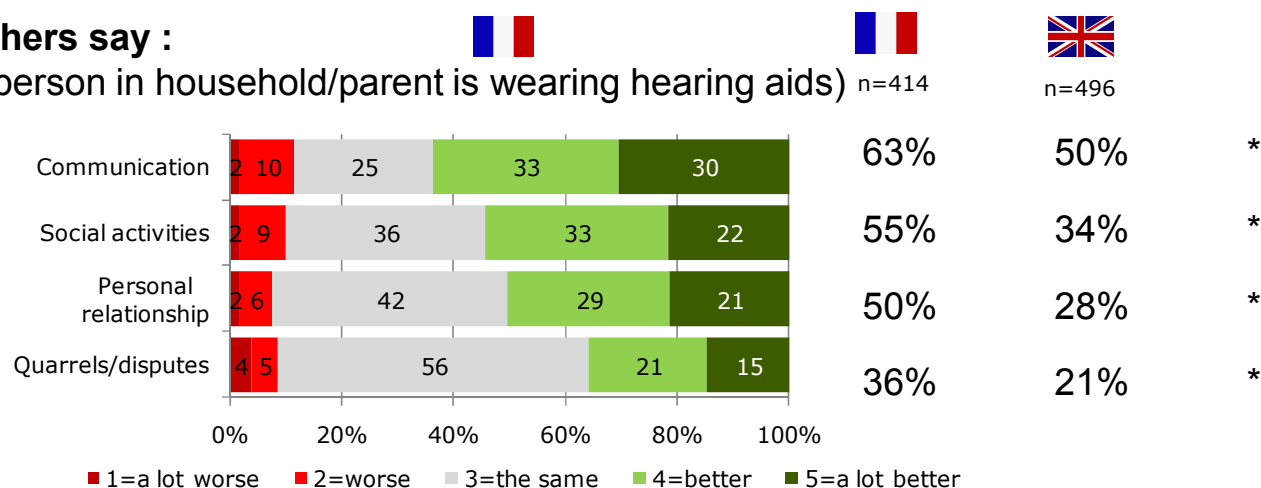
What hearing aid owners say (top 4 reasons):

% who state with hearing aid is better



What significant others say :

(since the impaired person in household/parent is wearing hearing aids)



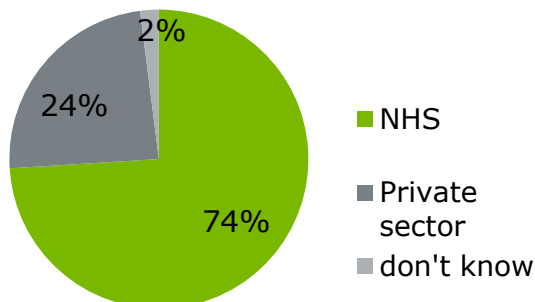
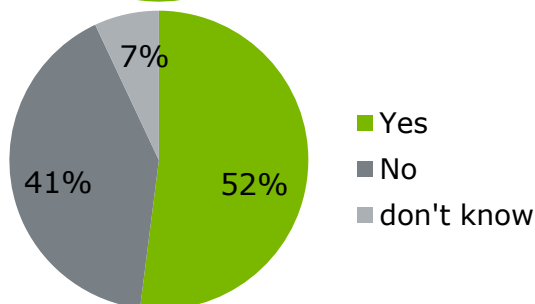
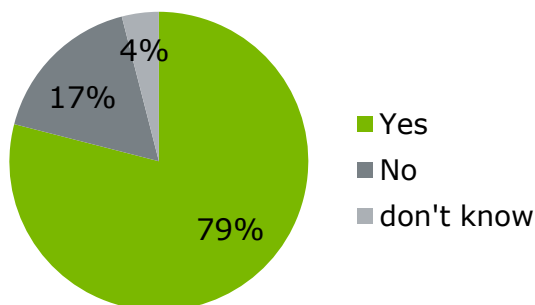
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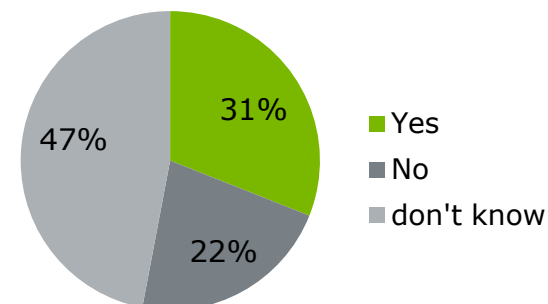
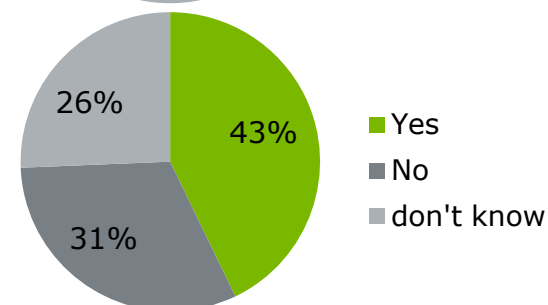
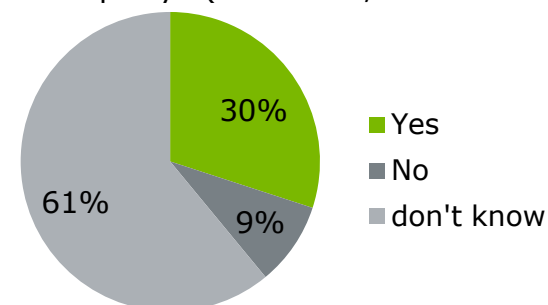
3rd party payment: Information deficit non-owners



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



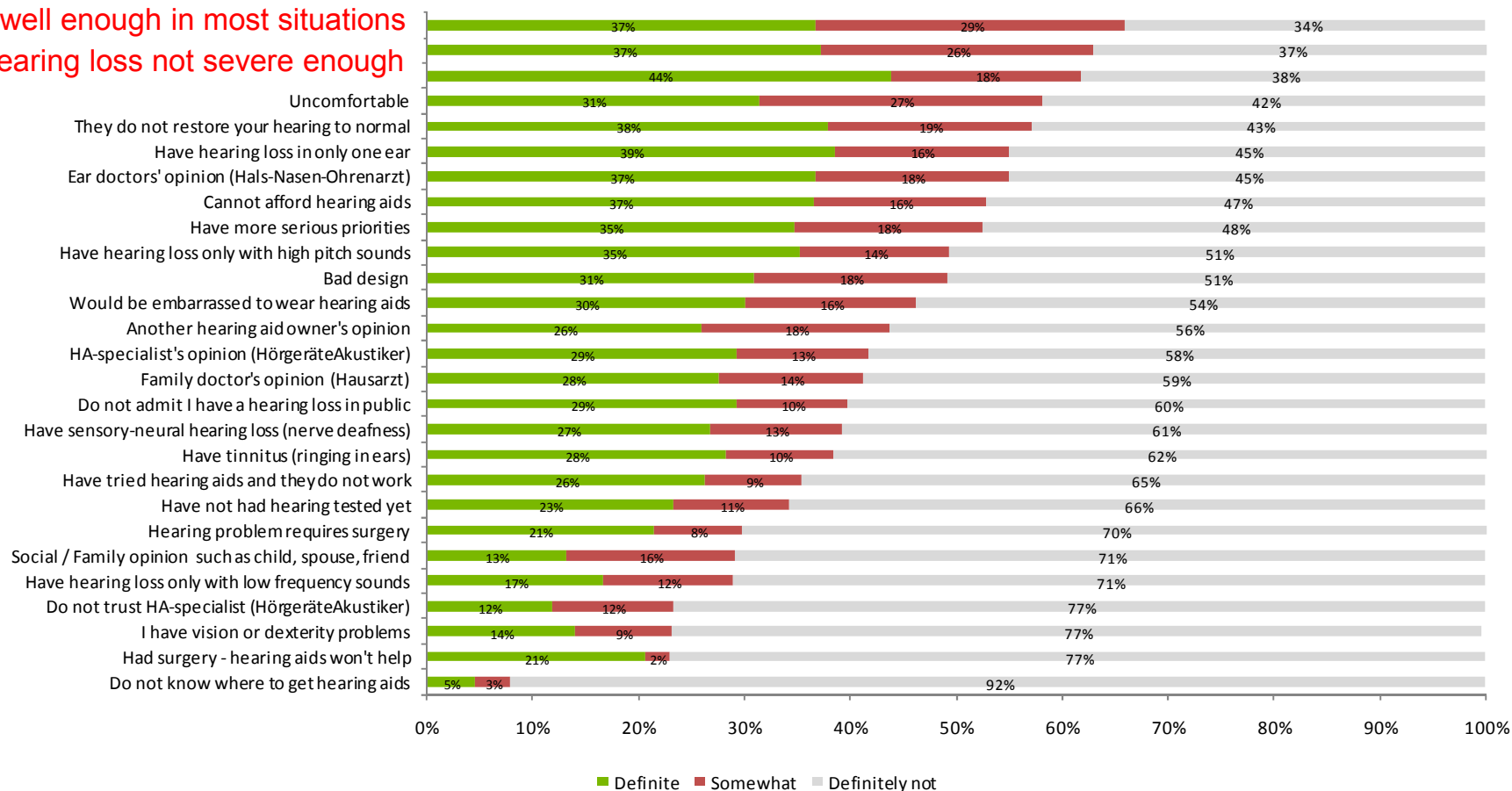
Non-owners: Based on your current knowledge, would any part or all of your hearing aid(s) be paid for by a third party? (Insurance, Government, ...)



Non-owners with **Top 50% hearing loss**: The main reasons for not owning hearing aids are that these people say they hear enough and they argue hearing aids don't work and are uncomfortable.

Example: 

Hear well enough in most situations
Hearing loss not severe enough



Non owners with top 50% hearing loss = 273

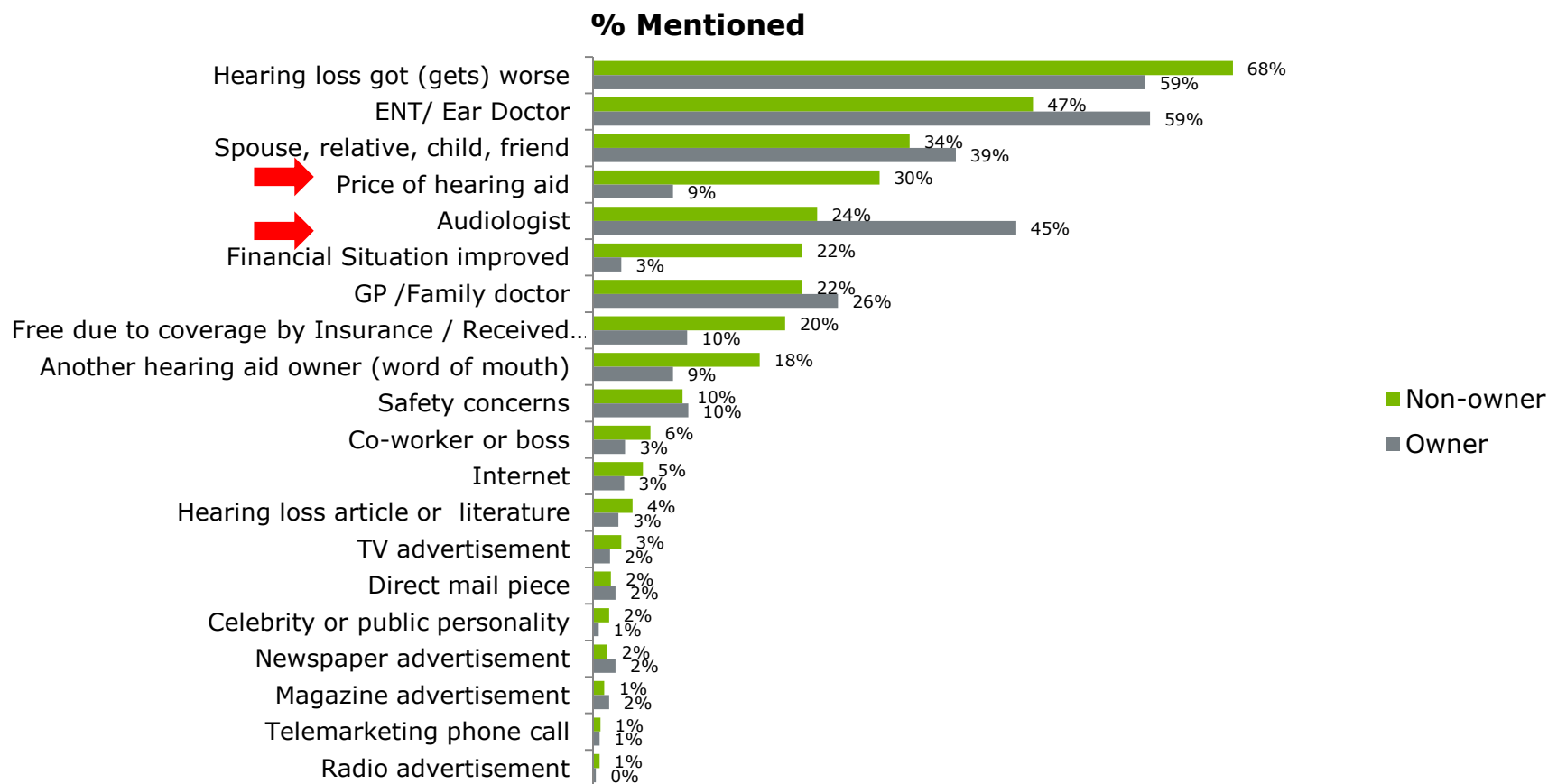
What non-owners say would influence them to buy is not necessarily what owners say influenced them to buy. The most important influencing factors are worse hearing loss, ENT and audiologist.



Example: 

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 ?



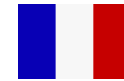
What non-owners say would influence them to buy:



**Worse
hearing
loss**



**Worse
hearing
loss**



**Worse
hearing
loss**



ENT



GP



ENT

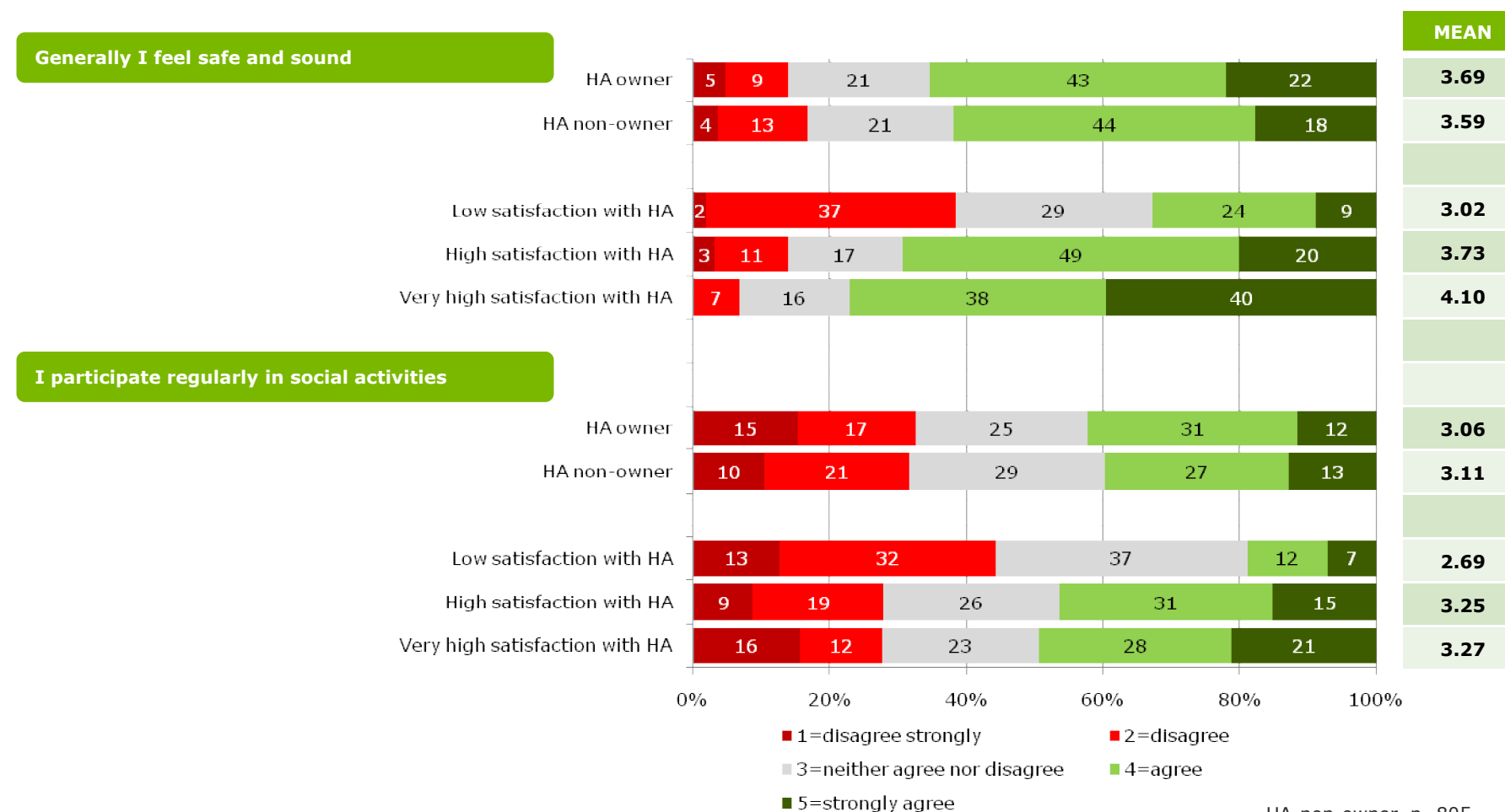


**Insurance
coverage**

Hearing impaired non-owners tend to feel less sound and safe and participate less in social activity compared to satisfied hearing aid-owners.



Example: 



HA-non-owner, n=805
HA-owner, n=503



To recap

- Hearing aids have positive impact on the quality of life of hearing impaired people.
- Demographic differences and different health care systems impact ...
 - hearing loss **awareness**
 - **reasons** why not to use hearing aids
 - **ownership** of hearing aids (adoption)
 - and therefore hearing aids **sold** in a country.
- Hearing aid owners ...
 - are highly **satisfied with dispensers/fitters**
 - are significantly **more satisfied** with **new hearing aid generations**
 - think that the challenges are still the **difficult listening situations**

The future



- It is EHIMA's intention to repeat the surveys in Germany, France and UK on a regular basis, e.g. every 2 years
- Would give us longitudinal data and the chance to study trends in the European markets
- Ambition: EuroTrak becomes a point of reference as MarkeTrak has been in the USA. For users, hearing healthcare professionals, health insurance companies and lawmakers. The combined EuroTrak-MarkeTrak data provides a solid background.
- Planned publication with more details in:

HearingReview
The Hearing Industry Resource from The Hearing Review and Hearing Review Products





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Thank you !

