



reissos dossier

EuroTrak 2012: the new countries

Four new nations have been added to the EuroTrak survey, undertaken by the European Hearing Aid Manufacturers' Association. Switzerland, Norway, Italy and Japan join the UK, France and Germany for the 2012 survey. In total more than 100,000 people have been questioned about their hearing, hearing aid ownership (or lack of) and the reasons behind their answers. In-depth questions look at routes to a hearing aid, hearing test regularity and tinnitus prevalence as well as the impact of hearing aid ownership on not just the wearers life but also significant others. Areas of the studies are devoted to the effect on the mental health, the impact on working life and the costs of non-ownership.

There are some areas of commonality across all countries, with all responding positively to the impact hearing instruments have on their jobs, personal income, mental health and forgetfulness. There are one or two surprising results that may guide the manufacturer associations in those countries to focus their efforts in future years; adult screening programmes, lobbying of politicians about the social costs and information campaigns for the hearing impaired will all help to achieve better results in the future.

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The Swiss are the happiest!



The first EuroTrak survey has taken place in Switzerland and despite a turbulent twelve months with the reimbursement system changing, the Swiss respondents are the most satisfied with their hearing instruments. They are also positive about the image of their hearing healthcare industry.

Nearly 15,000 people were surveyed about their hearing for the first EuroTrak study in Switzerland in 2012. The work was designed and executed by Anovum on behalf of HSM Switzerland (Hearing System Manufacturers). 8.8% of the people surveyed stated they have a hearing loss and 38.8% of this group have hearing instruments. 73% of hearing aid owners have binaural products. 84% of those people wearing instruments state they are either satisfied or very satisfied with their hearing aids. Overall satisfaction with hearing aids is highest in Switzerland for those people wearing BTEs, for instruments purchased in 2010 or after and for those who wear their products for more than 8 hours per day. Satisfaction with dispenser professionalism is high at 96%, with quality of service, counselling and aftersales service

Swiss Professionals

In a country of 7.8 million inhabitants, there are 402 ENT Specialists and approximately 470 hearing aid specialists. 90,438 were sold in 2011. (Source: Akustika)

scoring well in the 90s. Although 93% are happy with their hearing aid performance when in a one-to-one conversation, only 60% are content when in noisy situations. Hearing aid owners state their hearing instruments have had a positive impact on many aspects of their lives including: ‘communication more effective’, ‘participation in group activities’, ‘sense of safety’, ‘relationships at home and work’ and ‘social life’. Richness or fidelity of sound is the most important criterion for satisfaction. Hearing aids also provide a meaningful improvement for significant others in the household, with 60% stating communication was either better or a lot better.

7% of hearing aid owners use wireless technology, with 50% stating they have never heard of wireless technology in connection with hearing aids.

4% of people in Switzerland, who own hearing aids, do not wear them at all and 12% use them less than one hour per day. The main reasons given for lack of use are, “They do not work well in noisy situations”; “Hear well enough in most situations”; “Hearing aids do not restore hearing to normal” and “Uncomfortable”. For those who have a hearing impairment but haven’t purchased hearing instruments yet, many say they hear well enough, their hearing loss is not severe enough and that they do not work well in noisy situations. 7% of non-owners state they intend to purchase a hearing aid within the next year. Re-buying intentions are higher in the survey than first time buying intentions.

89% of people in Switzerland received some kind of 3rd party reimbursement for their hearing aids. The system for reimbursement has changed in the last year and the majority of hearing impaired people disapprove of the cost saving activities which come with the new compensation scheme. It remains to be seen if these changes will have an effect on the uptake of hearing aids in the future.

Victoria Adshead

Source: Anovum 2012 - EuroTrak Switzerland 2012

>> Swiss EuroTrak - A quick look at the numbers

Survey sample	14,836
Hearing loss prevalence	8.8%
Hearing aid adoption	38.8%
Binaural fitting rate	73%
Satisfied with hearing aid	84%
Received 3rd party reimbursement	89%
Hearing aids fitted 2009 or later	60%
Tinnitus prevalence	20%
Hearing test in last 5 years	39%

Yes to Hearing Aids



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With a 42.5% hearing aid adoption rate, Norway is top of the list of EuroTrak countries for the percentage of people with hearing instruments. With virtually no private hearing aid audiologists, Norwegians enjoy a public health system that reimbursed 94% of hearing aids fitted in the last few years.

The Norwegian health care system is similar to the UK's, in that the large majority of people are fitted with hearing aids free of charge. Probably due to the health care set up, the two countries also have similar penetration rates and satisfaction levels. But that is where the similarities end. The Norwegian government lists the hearing aids approved for sale that are covered by the National health system and these are changed every other year. The patient can then choose a device off this

list for which the government will pay a maximum of 5,570 Norwegian crowns (approx. £600).

14,866 people were surveyed during 2012 for the Norwegian EuroTrak. As with the other countries, the work was designed and executed by Anovum, but in Norway there wasn't a manufacturer association that could work with EHIMA, so an ad hoc group of five manufacturers (GN ReSound, Oticon, Phonak, Siemens and Widex Norway) collaborated with the users organisation HLF for the purpose of running EuroTrak.

8.8% of people stated they had a hearing loss and 42.5% of these people have hearing instruments, with 74% wearing binaural products. The binaural fitting trend is rising in Norway. When questioned about their hearing loss, 82% of those that own hearing aids said they had a hearing loss in both ears. Of those people who admit to a hearing loss but do not have hearing instruments yet, only 65% state they have a binaural loss....

Norwegian Audiology

For a population of 4.9 million people there are 360 audiologists and 312 ENTs. There were 105.000 hearing aids sold in 2011.

>> Norway EuroTrak - A quick look at the numbers

Survey sample	14,866
Hearing loss prevalence	8.8%
Hearing aid adoption	42.5%
Binaural fitting rate	74%
Satisfied with hearing aid	72%
3rd party reimbursement	94%
Hearing aids fitted 2009 or later	67%
Tinnitus prevalence	26%
Hearing test in last 5 years	78%

Once again, the most satisfied users were those wearing BTEs, with products purchased in 2010 or later and those that wore their hearing instruments for more than 8 hours per day. Norwegians wear their hearing instruments, on average, for 7.9 hours per day. Usage varies widely; with 10% of them never worn (probably in a drawer somewhere) and 14% use them less than one hour a day. Reasons given for this lack of use are: "They do not work well in noisy situations", "Hear well enough in most situations" and "Have tried and they do not work". At the other extreme 10% of people stated they wore them for 14-15 hours per day!

“ Communication in noisy environments is still a big challenge.”

Norwegians rated their hearing aid professionals and the service they received highly (82%). They were also happy with the products when in quiet and one-to-one conversations. Despite numerous studies that prove that directional microphones work, communication in noisy environments is still a big challenge for wearers. The highest dissatisfaction rating was for 'Use in noisy situations' – 39%. Battery life remains an issue with 32% not happy with the length of time their batteries last!

One in five Norwegians uses wireless technology in their hearing aids; two in five have never heard about wireless hearing aids. 73% believe wireless to be 'somewhat' or 'very' important. 12% of non-owners intend to get a hearing aid within the next twelve months. Re-buying intention is higher, with 20% of existing owners stating they will obtain a new hearing instrument in that time frame. Only 27% of people are willing to pay extra towards the cost of their hearing aids.

42% of people have had their hearing tested in the last five years and only 21% of people have never had their hearing tested.

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Source: Anovum 2012 – EuroTrak Norway/2012

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A very different picture



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The least regulated of the seven countries involved in the 2012 survey, Japan shows possibly the most interesting results. Hearing loss prevalence at 10.9% is comparable to the other countries but that is the only similarity. Hearing aids sold through the internet, mail order and optical shops contribute towards poor satisfaction ratings for the Japanese industry.

The Japanese Hearing Instrument Manufacturers Association (JHIMA) worked with EHIMA and Anovum to create a survey that could be used for JapanTrak, a study of 15,000 people about hearing loss. As well as translating the set questions used in the equivalent EuroTrak, JHIMA also added some questions just for the Japanese market.

The most revealing question asked where they purchased their hearing instruments from. Only 56% of hearing aids were purchased from a hearing aid dispenser/audiologist. 18% were purchased from an optical store; 7% from the internet; 7% from mail order; 5% from a shop such as an electronic store, watch or jewellery store; 4% came from an electronic store and just 2%

from a hospital or clinic. The answer to this question could explain why the Japanese are the most dissatisfied with their products and 'professional'. The binaural rate is just 39%, but this is slowly rising.

The lowest adoption and satisfaction rates

Of the 10.9% of the population with hearing loss, only 14% have hearing instruments (compared to 42.5% in Norway, 41% in the UK, 38.8% in Switzerland, 34% in Germany, 30.4% in France and 29.6% in Italy). When seeking help, 51% of GP consultations and 66% of ENT consultations recommended no further action.

12% of hearing aid owners don't use them at all and 17% use them less than one hour per day. The main reasons

>> JapanTrak - A quick look at the numbers

Survey sample	15,036
Hearing Loss prevalence	10.9%
Hearing aid adoption	14.1%
Binaural fitting rate	38%
Satisfied with hearing aid	36%
3rd party reimbursement	12%
Hearing aids fitted 2009 or later	59%
Tinnitus prevalence	30%
Hearing test in last 5 years	49%

given for this are: “they are uncomfortable”, “they do not work well in noisy situations”, “I have tried hearing aids and they do not work”. On average, hearing aids in Japan are worn for just 5.7 hours per day.

As with the EuroTrak countries, the more hours worn per day the greater the satisfaction with hearing aids, likewise hearing aids purchased after 2010 provide greater satisfaction for wearers. However, only 36% of owners are satisfied with their hearing instruments; possibly a reflection of the large percentage that are not fitted by trained audiologists as they have been bought from an optical, electrical or jewellery store or by mail order or through the internet. Søren Hougaard from EHIMA commented, “In a way, this is interesting because it shows that non-professional hearing healthcare also leads to lower user satisfaction.”

Satisfaction ratings for hearing instruments in Japan are low. Scores range from 27% satisfaction for managing feedback to 59% for quality of service for fitting. These results are extremely low compared to the EuroTrak countries, but may well be explained by the source of the products being through the internet, mail order and the like. Noriko Hanyu, Chief Editor of Audio infos Japanese Edition said, “There are many hearing aids sold

via the internet. Sometimes people buy a cheap device by internet, without fitting, if they don’t know what to do for their hearing problem. Most of them are not happy with what they have bought via the internet.”

94% of those surveyed do not know the system of supplying hearing aids by the government. Although the system would not help many of these people in Japan, as the National Health Insurance only reimburses those people with a ‘physical



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disability certificate’ which is given to people with a loss greater than 70dB in both ears. 12% actually received some help from the government! The reimbursement is limited to 43,900 yen (approx. £300) for a BTE for profound hearing impairment and 137,000 for a custom instrument (about £940).

“ The binaural rate is just 39%, but this is slowly rising.”

Hearing aid owners do believe there are some positive impacts of wearing instruments, with sense of safety, communication effectiveness and feelings about yourself all improving. Japan is the only country where significant others do not see a positive impact of hearing instruments. The majority believe the situation has not significantly improved since the person in the household/parent is wearing hearing aids; just 22% say communication is better!

Victoria Adshead



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Italian Audiology

For a population of 61.5 million there are 4,000 ENT specialists, 600 audiologists and 3,300 hearing aid specialists in Italy. 350,000 hearing instruments were fitted in 2011.

An economic impact

Of all the European countries in the EuroTrak survey, the Italian hearing impaired population appears to be the most effected by the economic downturn. The lowest adoption rate for hearing aids and a decreasing binaural fit rate are occurring even before the possible changes to the public health system take place.

In Italy 15,536 people were questioned about their hearing for the EuroTrak 2012 survey with 11.6% stating they have a hearing loss. This prevalence figure is second only to Germany at 12.5%. But the Italian nation has the lowest adoption rate of the European countries included in EuroTrak at 24.6%. Hearing aids are an expensive investment for this population; whilst the healthcare system offers 700 euros towards purchasing a hearing instrument,

>> ItalyTrak - A quick look at the numbers

Survey sample	15,536
Hearing loss prevalence	11.6%
Hearing aid adoption	24.6%
Binaural fitting rate	54%
Satisfied with hearing aid	70%
3rd party reimbursement	65%
Hearing aids fitted 2009 or later	78%
Tinnitus prevalence	33%
Hearing test in last 5 years	29%

adopters often have to find four or five times that amount to pay their bill. If their hearing loss is classified as ‘non-incapacitating’ then the cost is greater still. Analogue hearing aids are still provided free, but the supply is dwindling fast. The country cannot afford their healthcare system and the Italian government is in the process of structural reform, with audiology likely to be affected.

EuroTrak Italy is the only country to show a decline in binaural fittings, from 59% in 2010 to 44% in 2012. 70% said they were satisfied with their hearing aids, the lowest result in Europe. However, those people who purchased their hearing aids after 2010 gave much higher satisfaction scores of 78%. As in other countries satisfaction was high for people wearing their hearing instruments for longer than 8 hours per day – 82% of this group said they were satisfied.

Those satisfied with their hearing instruments do say they have a significant impact on difference aspects of their lives; “social life”, “participation in group activities” and “communicate more effectively” all scored highly with Italians.

29% of people have had their hearing tested in the last five years, but 56% have never had a test. The main reasons for not purchasing hearing aids by those that have been tested include; ‘Hear well in most situations’, ‘uncomfortable’, ‘Have more serious priorities’ and ‘would be embarrassed to wear a hearing aid’. 7% of hearing aid owners don’t use them at all and 8% use them less than one hour per day. Reasons for lack of use are ‘Hearing aids do not restore hearing to normal’, ‘they do not work well in noisy situations’ and ‘have tried and they do not work’.

10% of non-owners intend to purchase a hearing aid in the next twelve months, but an impressive 23% of people with hearing aids intend to re-purchase this year.

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