

# What can we learn from 3668 users in 7 countries?

Based on the anovum EuroTrak studies in GER, FRA, UK, NO, CH, IT and JapanTrak

### Advances in Audiology, Las Vegas Soren Hougaard, EHIMA



# Today's roadmap



1. An overview of the surveyed markets

- 2. Hearing rehabilitation: Societal and personal benefits
- 3. Satisfaction with and reasons not to use hearing aids

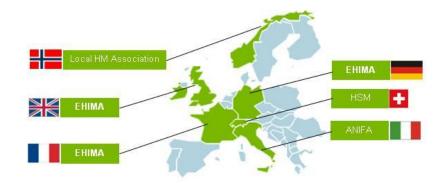




# 1. An overview of the surveyed markets

## Survey facts







	Short interviews	Long interviews				
	Representative	HA owners	HA non-owners			
UK	14896	501	795			
Germany (GER)	13922	500	864			
France (FRA)	15430	502	809			
Norway (NOR)	14866	691	618			
Switzerland (CH)	14836	514	813			
Italy (ITA)	15536	510	801			
JapanTrak (JAP)	15036	450 898				
Total	104'522	3668	5598			



4

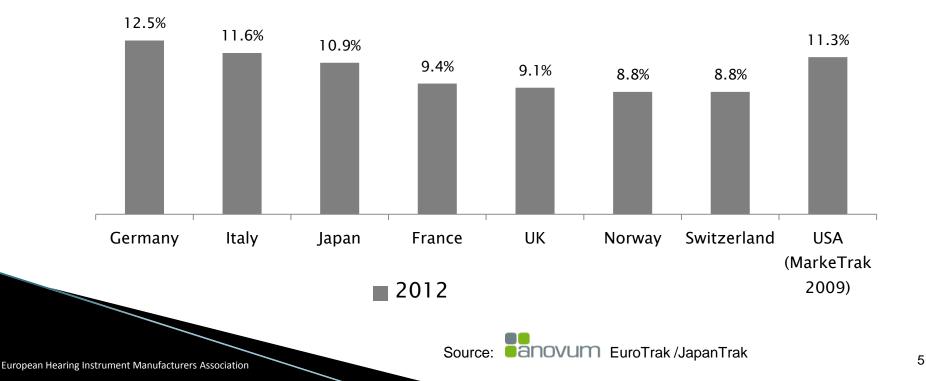


# Hearing loss prevalence differs

### % self-reported hearing impaired (Base: population)

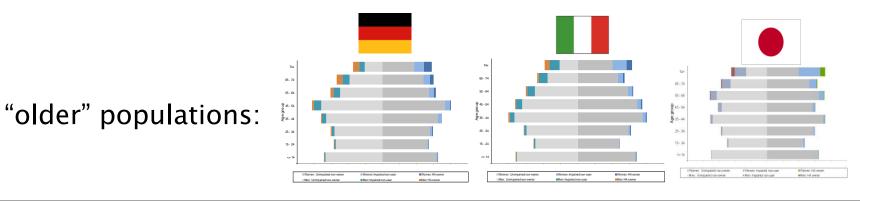
### Differences may be caused by:

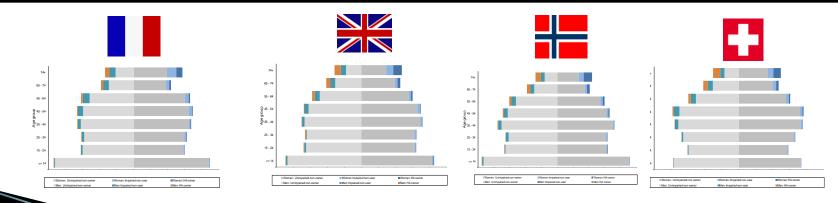
- Age-gender-structure (=age pyramid)
- Awareness: Hearing tests, health care systems etc.
- Prevention / Work situation
- Other factors



# Age pyramids differ





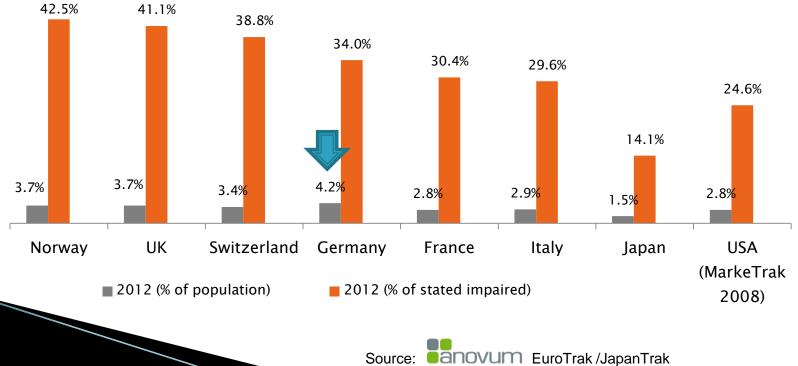


# Hearing aid adoption differs

### Adoption: Proportion of people with hearing aid (% of population) and adoption rate (% of stated impaired)

### Differences may be caused by:

- Health care system
- Reimbursement system / income structure
- Market development
- Culture
- Other factors.

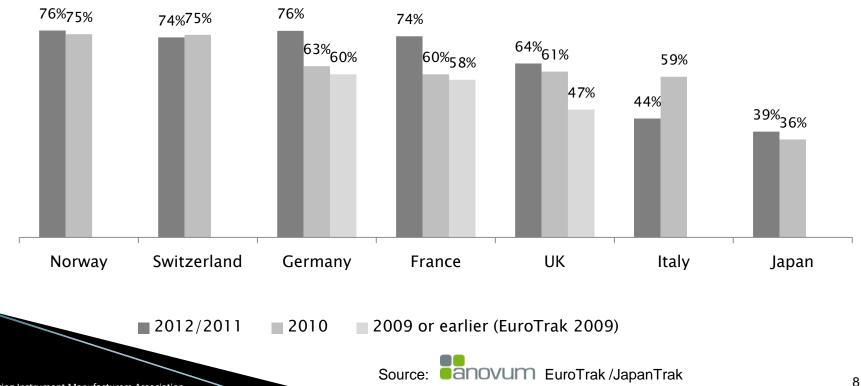


## Binaural fitting increasing in most countries

### % Binaural fitting

### Differences may be caused by:

- Health care system
- Reimbursement system / income structure
- Market development
- Professional "attitude"

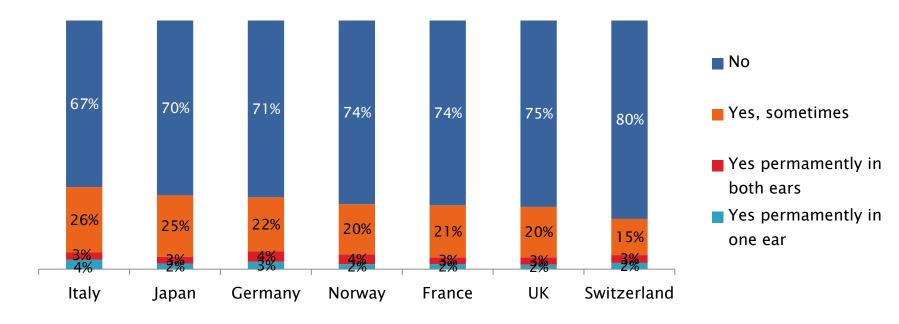




## **Tinnitus prevalence**



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



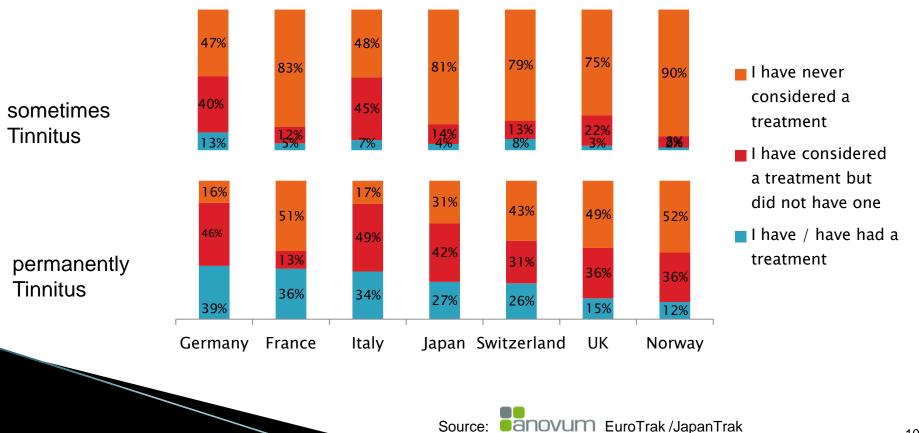
## **Tinnitus treatment differs**

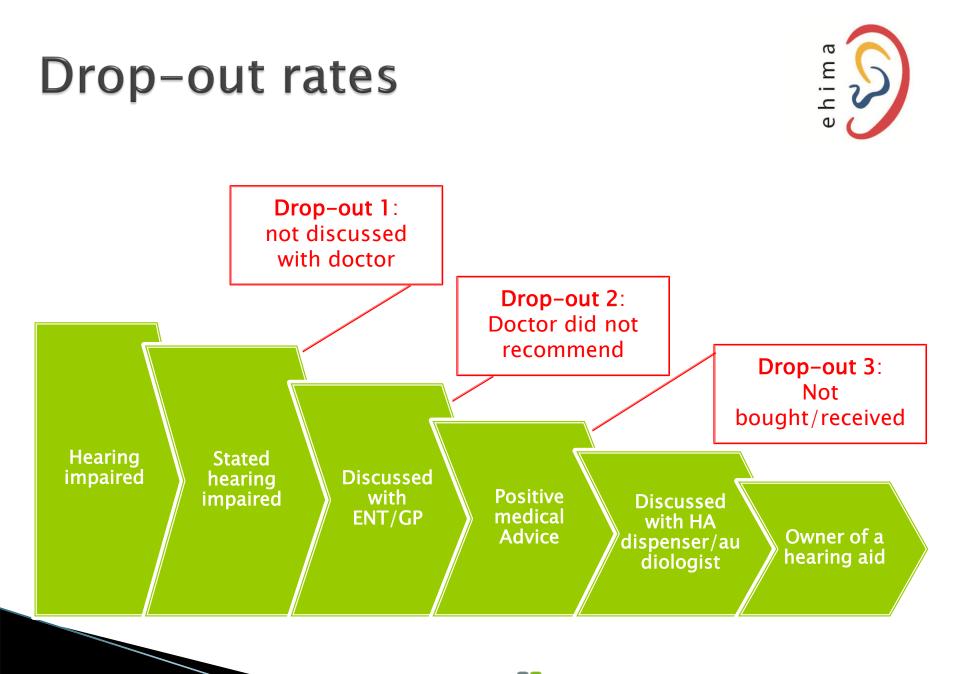


### Have you ever thought about a treatment of your tinnitus?

### Differences may be caused by:

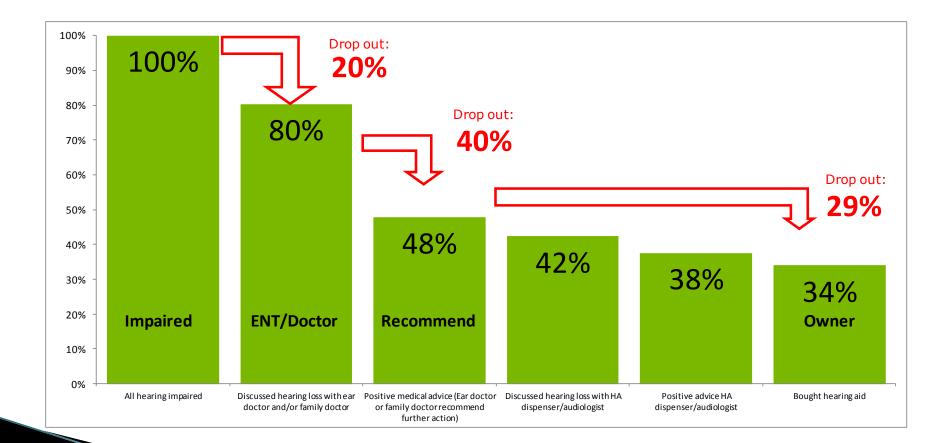
- Health care system / income structure
- Culture
- etc.







## Drop-out rates Germany

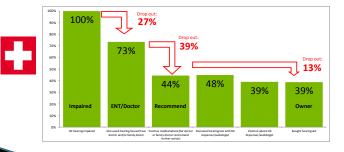


## Drop-out rates differ



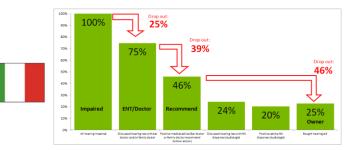


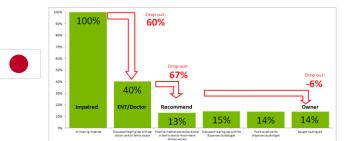














# In the UK only 10% of the population have had their hearing tested in the last 12 months.

### **OECD** Data shows:

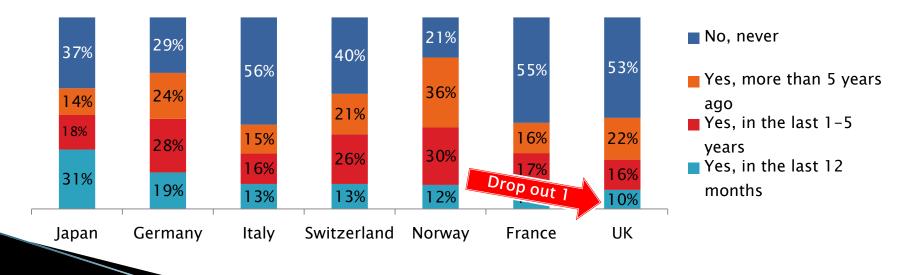
Drop out 1

- 1. The density of practicing physicians is lower in the UK
- 2. People in the UK go to the doctors' less often

### EuroTrak 2012 shows:

People in the UK rarely take hearing tests

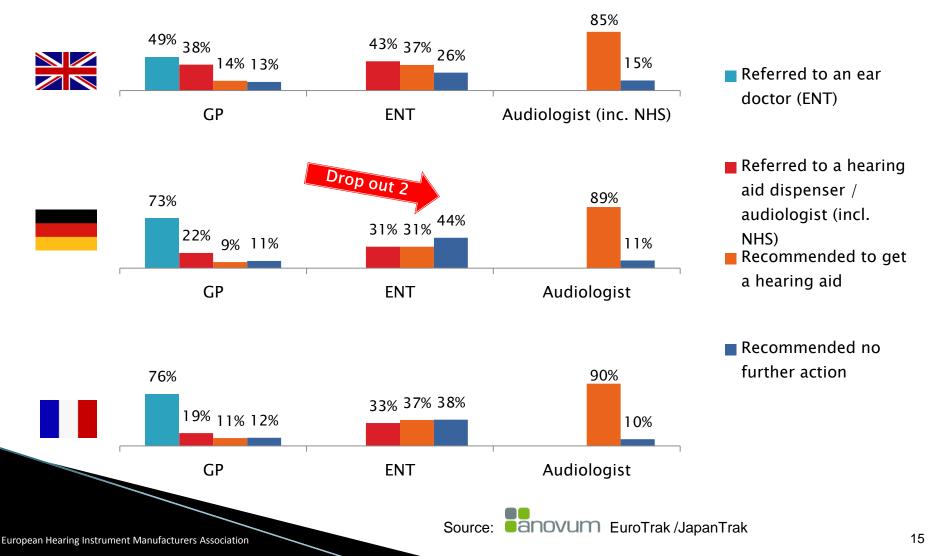
### Have you ever had your hearing tested? (Base:population)



# In Germany 44% were told by the ENT not to take any action

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Recommendations by profession



### The French cannot afford hearing aids



22

27

31

37

39

39

39

41

43

45

80%

90%

### Top 10 reasons for not having a hearing aid

Drop out 3							
Cannot afford a hearing aid			55			23	
Ear doctors opinion (ENT)			49			24	
Have more serious priorities		4	1		28		
Hearing loss not severe enough		37			26		
They do not work well in noisy situations		37			24		
Hearing Aid Dispenser/Audiologists opinion		37			23		
They do not restore your hearing to normal		33		ź	27		
Uncomfortable	-	33		2	6		
Family doctors opinion (GP)		34		2	3		
Hear well enough in most situations		25		30			
	0%	10% 20	0% 30%	40%	50%	60%	70%

Reason Somewhat a reason

reason Not a reason

Source: **EanOVUM** EuroTrak /JapanTrak

100%

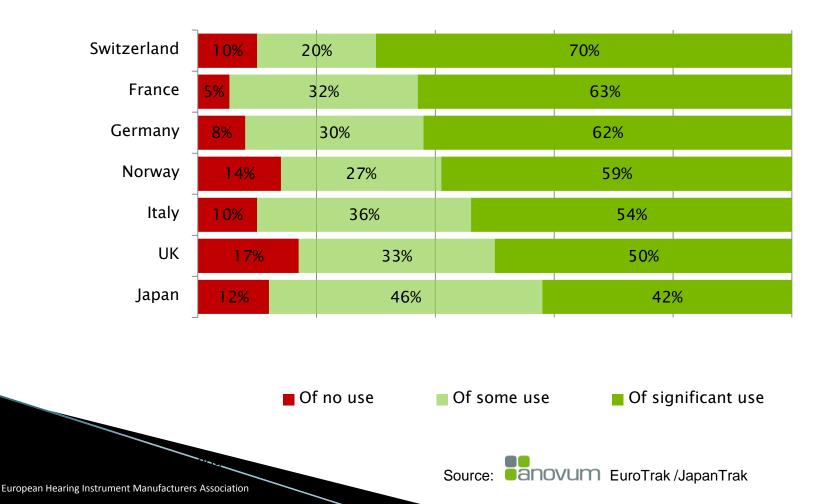


# 2. Hearing rehabilitation: Societal and personal benefits



### Hearing aids are useful on the job

How useful are your hearing aids on your job?



## Hearing aid owners recognize the positive impact on the chance to get promoted and to get the right job.

I think that people with an intreated hearing loss tend to e less promoted in their job I think that people with an intreated hearing loss tend to get the job they deserve I think that people with an intreated hearing loss tend to get the job they deserve I think that people with an intreated hearing loss tend to get the job they deserve I think that people with an intreated hearing loss tend to get the job they deserve I think that people with an intreated hearing loss tend to get the job they deserve I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing loss tend to be under-salaried I think that people with an intreated hearing los		Disa	gree strongly	Rather disagree	Neutral 🗧 🖡	ather agree	Strong
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Ithink that people with an intreated hearing loss tend to e less promoted in their jobI think that people with an intreated hearing loss tend 		Switzerland	10% 15%	19%	41%		15%
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	be under-salaried	France	4% 9%	55%		15%	17%
Norway 15% 18% 43% 16% 7%		Japan	7% 12%	5	8%	15%	8%
		Norway	1 5%	18%	43%	16%	7%

Source: **anovum** EuroTrak /JapanTrak

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# Social costs of mental health problems in General: Example UK

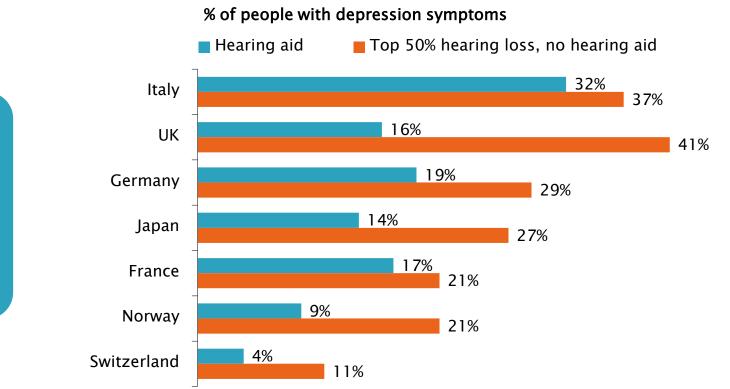


European Hearing Instrument Manufacturers Association

### Source: Canony EuroTrak / Japan Trak

# Depression symptoms: Hearing aid owners have a lower risk of being depressed (PHQ-2 Screening)





Top 50% means six tiles 4-6 with a similar degree of hearing loss as hearing aid owners:

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

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



Depression

symptoms:

Screening: In the last 2 weeks:

Little interest or

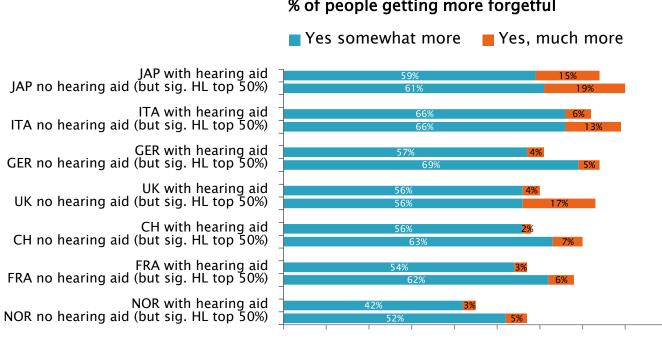
depressed, hopeless

PHO-2

pleasureFeeling down.

Dementia symptoms: Hearing aid owners have lower risk of being forgetful compared to impaired non-owners with comparable hearing loss





### % of people getting more forgetful

Base: Hearing aid owners and non owners with top 50% hearing loss

Top 50% means six tiles 4-6 with a similar degree of hearing loss as hearing aid owners:

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

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

Source: **anovum** EuroTrak /JapanTrak

Dementia symptom: •Getting more forgetful in the last vear?

# Social costs of "Burnouts" is in the daily press: Example Switzerland



### Burnout, Depression, Angstzustände Die Schweiz ist ausgebrannt

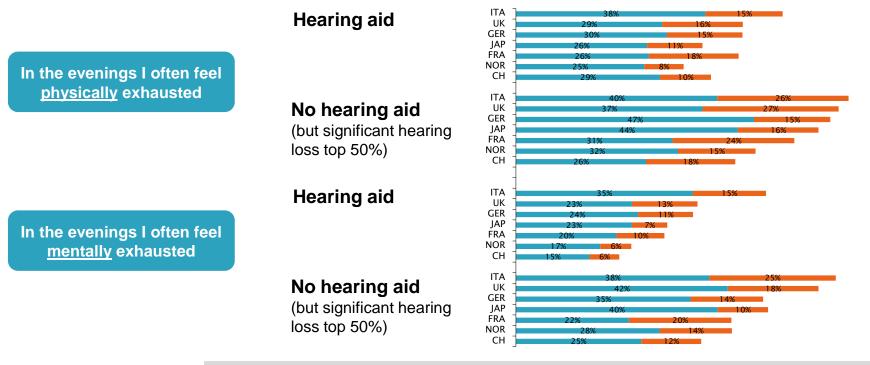
ZÜRICH/BERN - Burnout? Simulant, heisst es bei vielen Arbeitgebern. Tatsache ist: Die Zahl de<mark>r psychisch und physisch Erschöpften s</mark>teigt und verursacht in der Schweiz jährliche Kosten in Milliardenhöhe.

«Allein in der Schweiz belaufen sich die durch stressbedingte Beschwerden verursachten Kosten auf jährlich 4,2 Milliarden Franken. Die Vermutung liegt nahe, dass Burnout für einen Grossteil dieser Kosten verantwortlich ist», erklärt Psychiater Joe Hättenschwiler vom Zentrum für Angst- und Depressionsbehandlung (ZADZ) in Zürich. Mentally and physically exhausted people

cost CHF 4.2 billions/year in Switzerland

### Source: CH-Blick; 13.4.2012

# Compared to impaired hearing aid non-owners with significant hearing loss, hearing aid owners feel less exhausted in the evenings



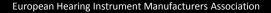
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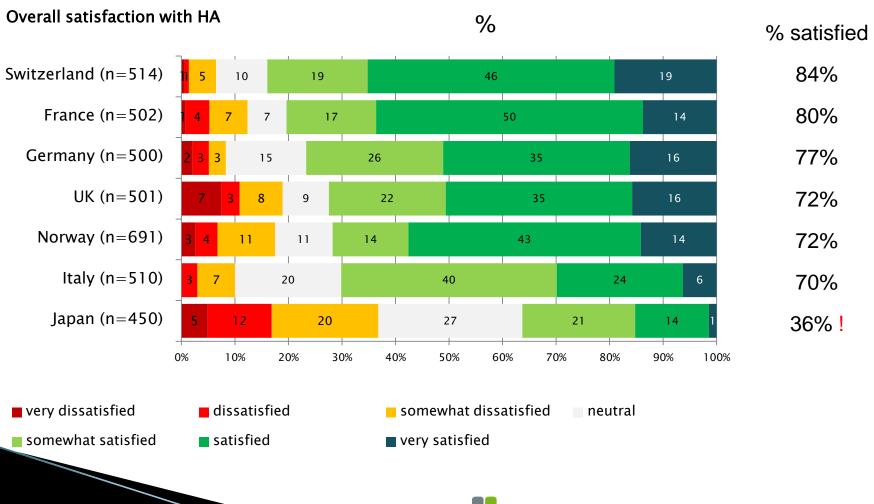


Rather agree Strongly agree



# 3. Satisfaction with and reasons not to use hearing aids

### The majority are satisfied with their hearing aids

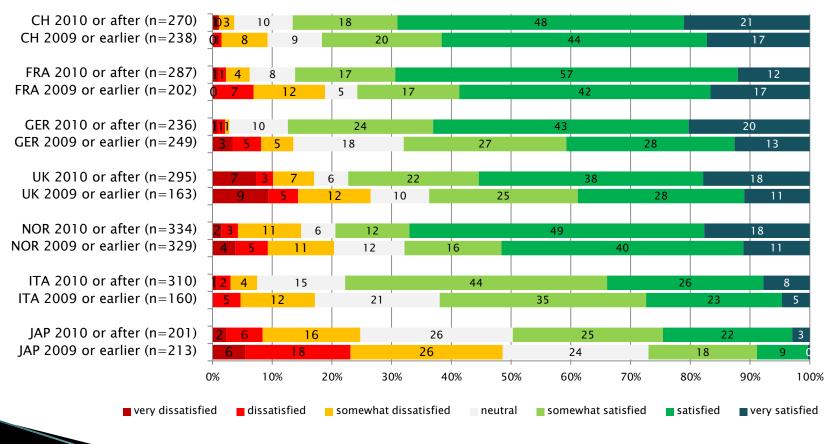






# Customers with newer hearing aids are more satisfied – in every measured country

### Overall satisfaction with HA

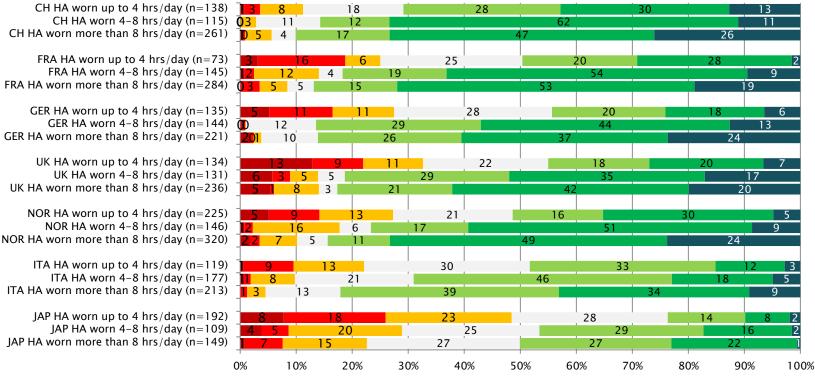


Source: **anovum** EuroTrak /JapanTrak



### The longer hearing aids are worn - the more satisfied customers are

### **Overall satisfaction with HA**

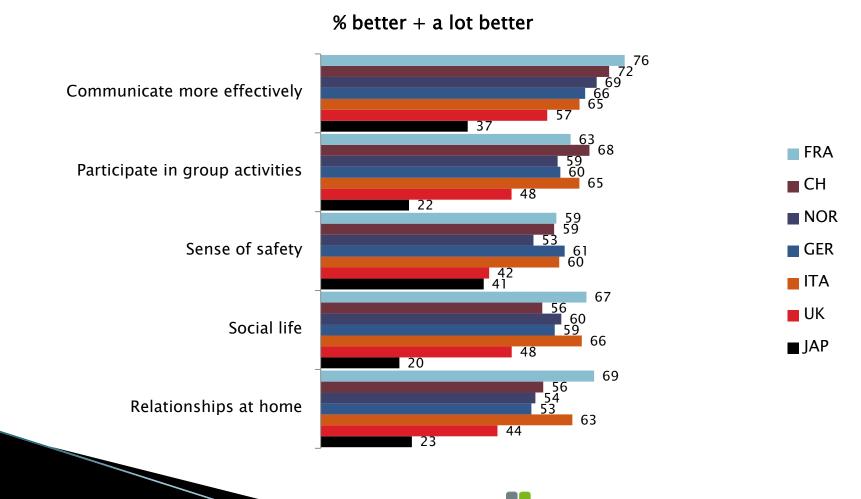


dissatisfied

somewhat dissatisfied neutral somewhat satisfied satisfied

verv satisfied

verv dissatisfied



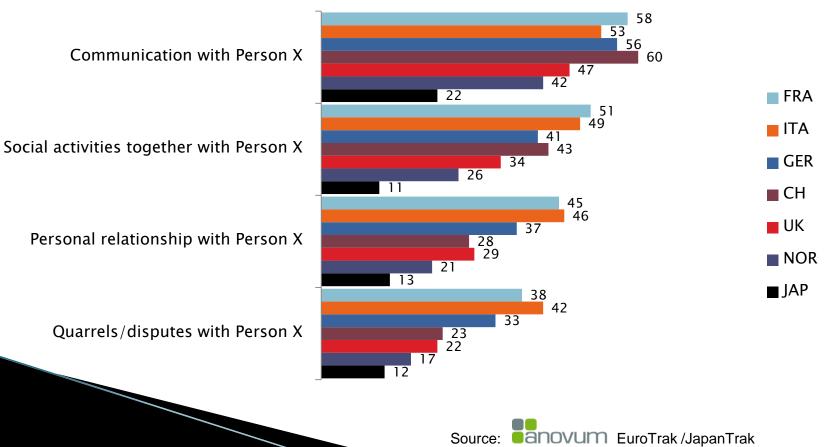
### Significant positive impact of HAs on different aspects – especially communication has improved

Source: **EanOVUM** EuroTrak /JapanTrak



### 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?



% better +a lot better



### Top 10 reasons for not having a hearing aid



Bars represent importance within each country (individual scale size per country)

Reasons % somewhat a reason + a reason	ITA	FRA	GER	UK	NOR	СН	JAP
Uncomfortable	68	59	62	74	59	52	73
Hearing loss not severe enough	63	63	58	72	61	62	63
Hear well enough in most situations	73	55	68	54	68	64	49
They do not restore your hearing to normal	62	61	68	59	55	51	59
They do not work well in noisy situations	58	61	64	57	69	56	49
Have more serious priorities	65	69	54	62	44	*	*
Would be embarrassed to wear a hearing aid	65	*	55	52	39	*	41
Ear doctors opinion (ENT)	*	73	55	*	42	53	*
Bad design	65	*	*	47	*	*	37
Cannot afford a hearing aid	63	78	58	*	*	*	*
Have tinnitus (ringing in ears)	*	*	*	*	41	39	38
Hearing Aid Dispenser/Audiologists opinion	*	61	*	*	*	46	*
Do not admit I have a hearing loss in public	59	*	*	46	*	*	*
Family doctors opinion (GP)	*	57	*	*	*	40	*
Another hearing aid owners opinion	*	*	51	*	*	40	*
Have hearing loss only with high pitch sounds	*	*	*	*	38	*	40
Have not had hearing tested yet	*	*	*	50	*	*	*
Have hearing loss only with low frequency sounds	*	*	*	*	*	*	40

\* not within the Top10 reasons for this country

Base: non owners Top 50% HL

Source: **EanoVUM** EuroTrak /JapanTrak

### Top 10 reasons for HA owners NOT using them



Bars represent importance within each country (individual scale size per country)

FRA	СН	NOR	ITA	UK	GER	JAP
75	77	75	76	84	77	84
79	91	88	73	67	80	86
79	76	59	45	75	62	87
62	56	72	65	72	47	86
81	89	84	56	65	73	*
69	69	60	*	40	77	31
67	*	43	*	40	48	31 Sorted
*	69	41	*	39	55	28 0
*	*	*	54	42	43	<b>3</b> 0 ₹
63	44	*	55	*	*	* overall importance
*	50	*	*	43	43	25 <u>a</u>
61	*	34	*	*	*	36 <del>-</del>
*	45	39	*	*	49	* lodi
65	*	*	*	*	*	* rtar
*	*	*	53	*	*	* 1Ce
*	*	*	48	*	*	*
*	*	*	48	*	*	*

Reasons % somewhat a reason + a reason

They do not restore your hearing to normal They do not work well in noisy situations Uncomfortable

Have tried hearing aid and they do not work Hear well enough in most situations

Hearing loss not severe enough

Have hearing loss in only one ear

Have hearing loss only with high pitch sounds Bad design

Do not admit I have a hearing loss in public Would be embarrassed to wear a hearing aid Have tinnitus (ringing in ears)

Have more serious priorities

Have hearing loss only with low frequency sounds Have Sensor-neural hearing loss (nerve deafness) Social / Family opinion such as child, spouse, friend I have vision or dexterity problems

\* not within the Top10 reasons for this country

Owners who don't use, low sample sizes!

Source: **anovum** EuroTrak /JapanTrak

### Influencing factors



**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 ?

	CH Non-	UK Non-	FRA Non-	GER Non-	ITA Non-	JAP Non-	NOR Non-
	Owner	Owner	Owner	Owner	Owner	Owner	Owner
Influenceing factors non-owners	(n=813)	(n=795)	(n=809)	(n=864)	(n=801)	(n=898)	(n=618)
	Bars represe	nt importanc	e within each	າ country (ind	ividual scale	size per coun	try)
Hearing loss got worse	82%	69%	64%	74%	51%	65%	42%
ENT/ Ear Doctor	51%	47%	53%	51%	51%	40%	33%
GP /Family doctor	35%	58%	20%	23%	25%	32%	28%
Spouse, relative, child, friend	47%	28%	26%	35%	16%	29%	30%
Price of hearing aid	30%	32%	49%	28%	34%	21%	13%
Free (Insurance, hearing aid free of charge)	35%	22%	42%	33%	18%	13%	17%
Another hearing aid owner (word of mouth)	36%	25%	19%	17%	19%	13%	18%
Hearing aid dispenser / Audiologist / Akustiker	38%	17%	22%	30%	26%	9%	27%
Financial Situation improved	13%	15%	23%	22%	20%	8%	*
Safety concerns	19%	*	17%	8%	18%	11%	10%
Audiologist (NHS)	*	38%	*	*	*		*
Information/advice about hearing loss from consumer organisation or charity	13%	*	*	*	*	*	10%
Co-worker or boss	12%	*	*	*	*	*	*
Hearing loss article or literature	*	*	*	*	*	7%	*
Newspaper advertisement	*	*	*	*	*	3%	*

Sorted by overall importance

# Some conclusions



- We need to educate ENT doctors better
- We need to inform the hearing impaired better about reimbursement possibilities
- We should advocate adult screening programs (NB: diabetes!)
- We should "educate" politicians about the social cost issues (labor market, burn-outs, depression, dementia,)
- Channel more info to tinnitus patients re treatment options?





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## Annex



### Satisfaction with current hearing aid



