EuroTrak: Are we better than the French and Germans?

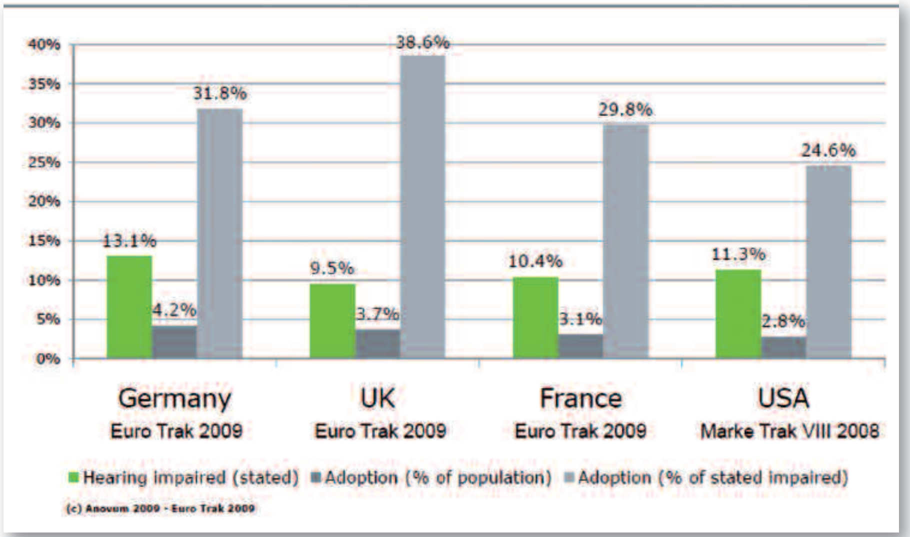
Waiting lists are down, hearing aid fittings have increased and the private sector is relatively buoyant, but what do the public think of the products and service they have been receiving in the UK? With the highest penetration in the EuroTrak countries, the UK public are not as satisfied as the French but much happier than the Germans with their audiological provision. In part one we look at the general findings of the premier EuroTrak.

The first results from the EuroTrak 2009 study were released at EUHA 2010. 45,000 people in the UK, Germany and France were surveyed about their hearing ability and hearing aid usage or non-adoption. The organisation behind this new study is the European Hearing Instrument Manufacturers Association (EHIMA) which represents the 'big six' manufacturers: GN ReSound, Phonak, Oticon, Siemens, Starkey and Widex. The plan is to repeat this research every two years; making this most significant in the number of people involved and the frequency of the data. There are several reasons why EHIMA funded this survey. It is important that organisations actually know the data for their countries (and not just guess or rely on outdated information); EHIMA wanted to know if the MarkeTrak data from the USA was actually valid for Europe and if not to what extent. Søren Hougaard, Secretary General of EHIMA said, "We have always quoted the great data from MarkeTrak as a trustworthy source, but have never known for sure if the data were actually also valid for European markets. The information should also prove important for communication and lobbying purposes as no European politician would be impressed by data "transported and translated" from the USA."

EHIMA, ultimately, hope the EuroTrak surveys will gradually develop into a knowledge base like MarkeTrak, i.e. become the point of reference for people in the hearing healthcare field in its broadest sense. Søren Hougaard added, "We also hope that we are now in a better position to argue with politicians and policy makers in the healthcare field. Finally we hope that we have news which might also be of interest to the media and the general public so that we can make yet another step in our ongoing efforts to increase public awareness about hearing loss and the solutions available."

It is EHIMA's plan to repeat EuroTrak every two years, "The results of the first round have been so positively received and have generated so much interest that I sincerely hope there will be a budget for this every two years," Søren said.

>> Hearing loss prevalence and hearing aid adoption



Survey Methodology

In 2009 thousands of people were approached by Anovum a Swiss market research company to take part in the first EuroTrak survey. A total of 44,710 responded across the three countries of Germany, France and the UK. There are several reasons why these countries were chosen to 'represent' Europe. Firstly for budget reasons 27 different countries could not be approached, especially if, importantly, this is going to be repeated every two years. UK, France and Germany were chosen as they are big European markets (total population is approximately 200 million people), they have different educational systems, different reimbursement systems and they are representative of the different regions in Europe. Søren Hougaard explained that he "Personally misses a Scandinavian country and an East-European country. That would almost complete the picture." But at this early stage it is more important to start collating longitudinal data to start analysing trends than extending to more countries. There are discussions with other countries but funding for this would need to come from those individual nations.

Step one in the methodology was to approach the general population with the objective of assessing the prevalence of hearing loss and hearing aid ownership. Further questions then went on to look at the target groups of the hearing impaired with hearing aids and those non-adopters; with the view to looking at the details of satisfaction with hearing aids, or people reasons for non-adoption. It took three months in each country to get enough data to be meaningful. Søren said at EUHA, "Never before were so many people interviewed in such great detail about these topics."

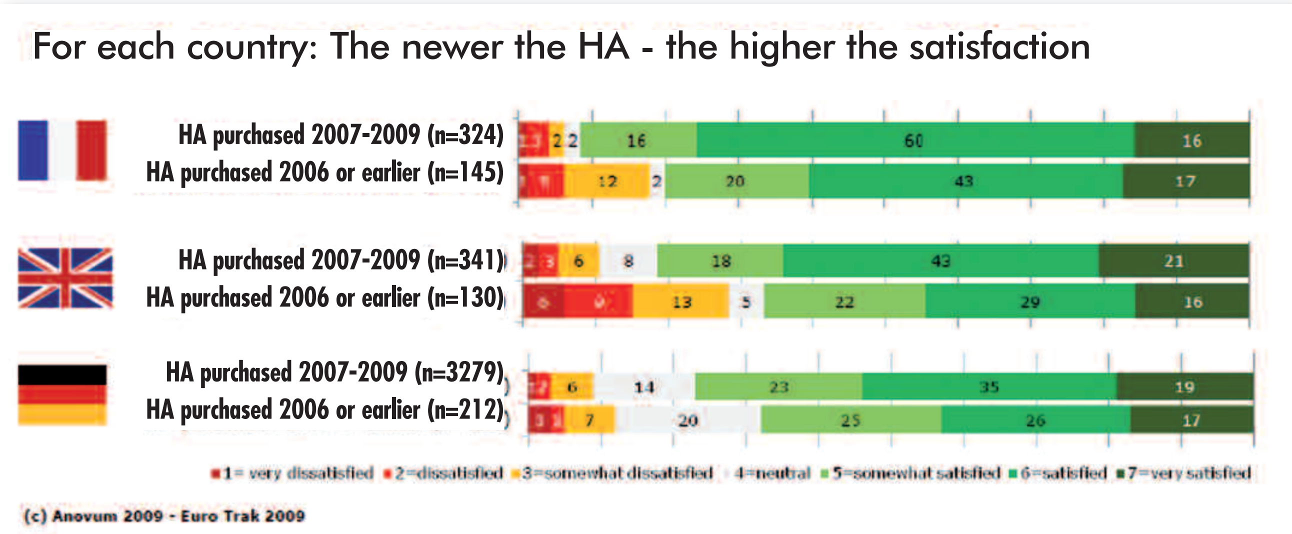
UK has highest penetration rate

The first significant statistics to arise from EuroTrak are the prevalence of hearing loss and hearing aid adoption. The UK is often quoted as having one of the highest adoption rates for hearing instruments, second only to Denmark (Bridget Shields 2006). The EuroTrak data bears this out as the UK figures show a 38.6% adoption rate for those interviewed, compared to 31.8% in Germany, 29.8% in France and 24.6% in the US MarkeTrak report. Whilst we are slightly better at getting people to wear hearing instruments, we still lag behind in fitting two ears with just 47% of UK respondents fitted binaurally, compared to 60% of Germans, 58% of French and a high of 74% in the US. There is still work to be done in all countries on binaural fittings but the UK has the most work to do. What is not possible to tell from the figures is the influence NHS fittings have on the binaural rate; 74% of those surveyed in the UK obtained their hearing instruments from their NHS audiology department.

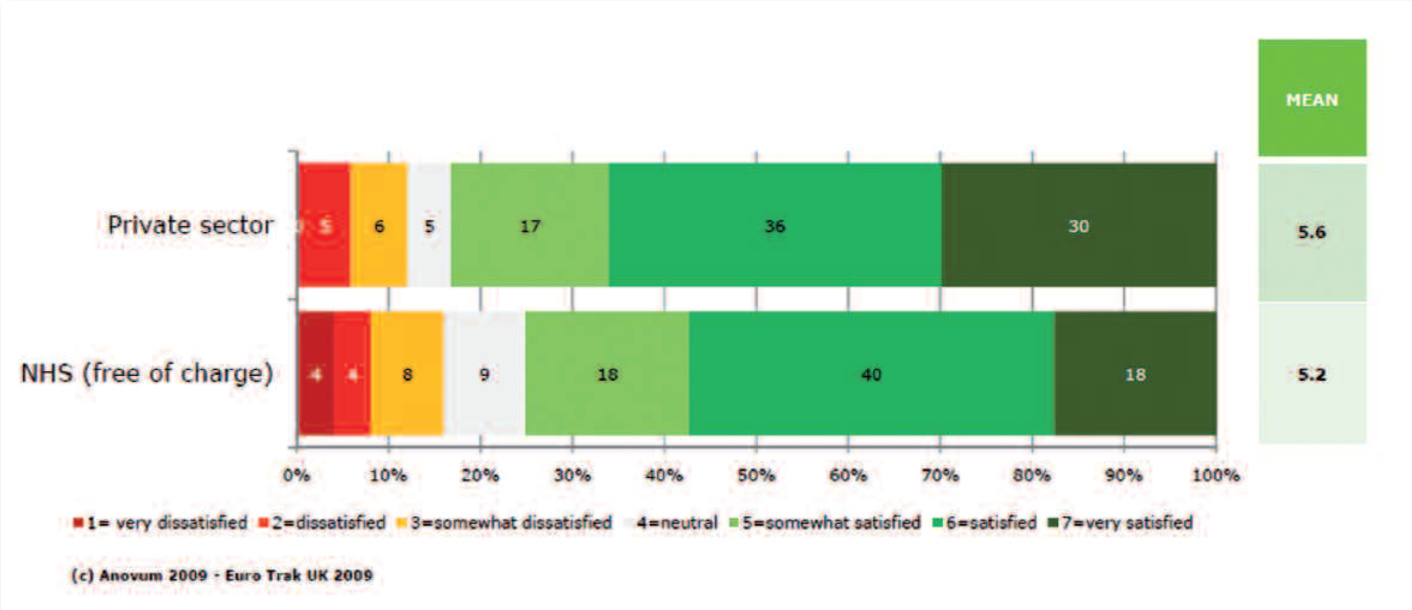
Higher satisfaction in UK than Germany!

Across all three countries there were similar patterns of satisfaction. New technology was proven to make a difference to satisfaction, with people happier with

>> New technology makes a difference



>> Satisfaction NHS lower than private



products that are less than two years old. People's overall satisfaction with their hearing aids also directly correlated with the amount of time they wore the hearing instruments for; the longer the hours worn, the higher the satisfaction. A positive result for the UK was satisfaction levels in general with 82% or people reporting they were satisfied with their hearing instruments (fitted after 2007). This compares with only 77% of happy Germans. We were still someway behind the French, however, who claimed 92% of them were satisfied. Overall, UK hearing instrument wearers had a satisfaction score of 77% (when taking into account the responses of people with older technology). 83% of those fitted by a private dispenser were satisfied, somewhat satisfied, or very satisfied, compared to 76% from NHS fittings. NHS audiologists did score higher on aspects of professionalism, counselling and fitting; it would seem that the products let them down as they scored much lower than the private fittings.

> "9% of non-owners intend to obtain a hearing aid within the next year."

Hearing aid owners had many reasons to be satisfied with their instruments, the top four were; the ability to communicate more effectively, the impact on their social lives, relationships at home and the ability to participate in group activities. This was also supported by the reports of 'significant others'.

Why people don't have hearing aids

The survey asked a lot of questions to those who admitted to a hearing loss but had not seeked help yet. The main reasons they gave as to why they do not wear hearing instruments were that they hear well enough and that their impairment is not severe enough. The most important influencing factors on this population to obtain a hearing instrument would be if their hearing loss worsened, and if the GP, ENT or Audiologist recommended. Interestingly, what would make a non-owner buy/visit their NHS department are not what owners say influenced them to step forward. One of the highest influencers on those currently wearing instruments was their spouse or a family member. Other areas that scored highly as reasons not to have a hearing instrument were that they are uncomfortable; they do not restore natural hearing; embarrassed to wear a hearing instrument; a reluctance to admit to a hearing loss in public and that they haven't had their hearing tested yet. 9% of non-owners intend to obtain a hearing aid within the next year. Re-buying intention is higher than first-buying intention.

'Lies, damn lies and statistics'

One issue to be resolved (or quietly ignored) is the discrepancy in the figures from different organisations. All countries involved in EuroTrak have this issue; in Germany there are FGH public screening figures which are different from the EuroTrak numbers. In the UK there are similar discrepancies. The Bridget Shields report from 2006 estimated hearing impaired people at 7.5 million, the RNID regularly quote 9 million (from their annual members survey). EuroTrak puts prevalence at 9.5% which extrapolated out on 2009 national statistics office population figures of 61,792,000 would mean 5,870,240 people in the UK admit to some degree of hearing impairment. The EuroTrak report points out that the figures are "stated hearing loss" and not "measured hearing loss", therefore those people that are willing to admit to a hearing problem.

In the next issue we will look in more detail at the UK findings; satisfaction, buying influences, tinnitus issues and why we still have 61% of people who admit to a hearing loss not seeking the help that is available.

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