

Hearing Aids improve Hearing - and a LOT more

Trends derived from the EuroTrak databases
2009 - 2020

June 2020

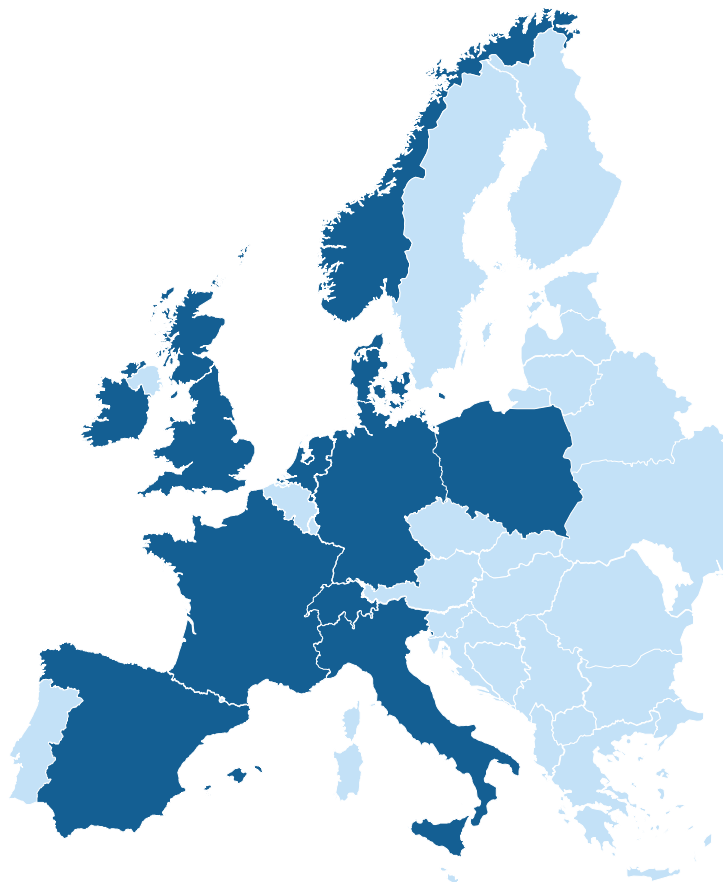
EuroTrak



NEW

- Initiated by EHIMA in 2009
- Questionnaire designed to be compatible with U.S. MarkeTrak to secure cross-continent comparisons
- On-line survey method
 - Surveys mailed to online panel members. Samples balanced, based on census information with respect to age, gender and region
- Focus on hearing status and hearing aid usage
 - Self assessment
- Issued in parallel in England, Germany and France (+Italy & Spain for ET IV)
- Repeated every 3 years to generate trends over time

Status 2020



Country	2009	2012	2015	2016	2017	2018	2019	2020
Germany	✓	✓	✓			✓		NEW
France	✓	✓	✓			✓		
UK	✓	✓	✓			✓		
Switzerland		✓	✓			✓		
Italy		✓	✓			✓		
Japan		✓	✓			✓		
Norway		✓					✓	
Denmark		✓		✓				
Poland				✓			✓	
Netherlands				✓				
Belgium					✓			
New Zealand						✓		
Spain								✓
China								?
Korea								?

Pooled data: Total sample sizes

Representative sample (sample 1)

	EuroTrak I (2009)	EuroTrak II (2012)	EuroTrak III (2015)	EuroTrak IV (2018/20)	Total
UK	14'980	14'896	14'473	14'855	59'204
Germany	14'183	13'922	13'775	13'583	55'463
France	15'545	15'430	14'824	15'061	60'860
Italy*	-	-	-	15'015	15'015
Spain*	-	-	-	15'505	15'505
Total	44'708	44'248	43'072	74'019	206'047

*Italy and Spain are included for analysis of EuroTrak IV data; times series (2009-2018) include UK, Germany and France only

Pooled data: Hearing impaired sample sizes



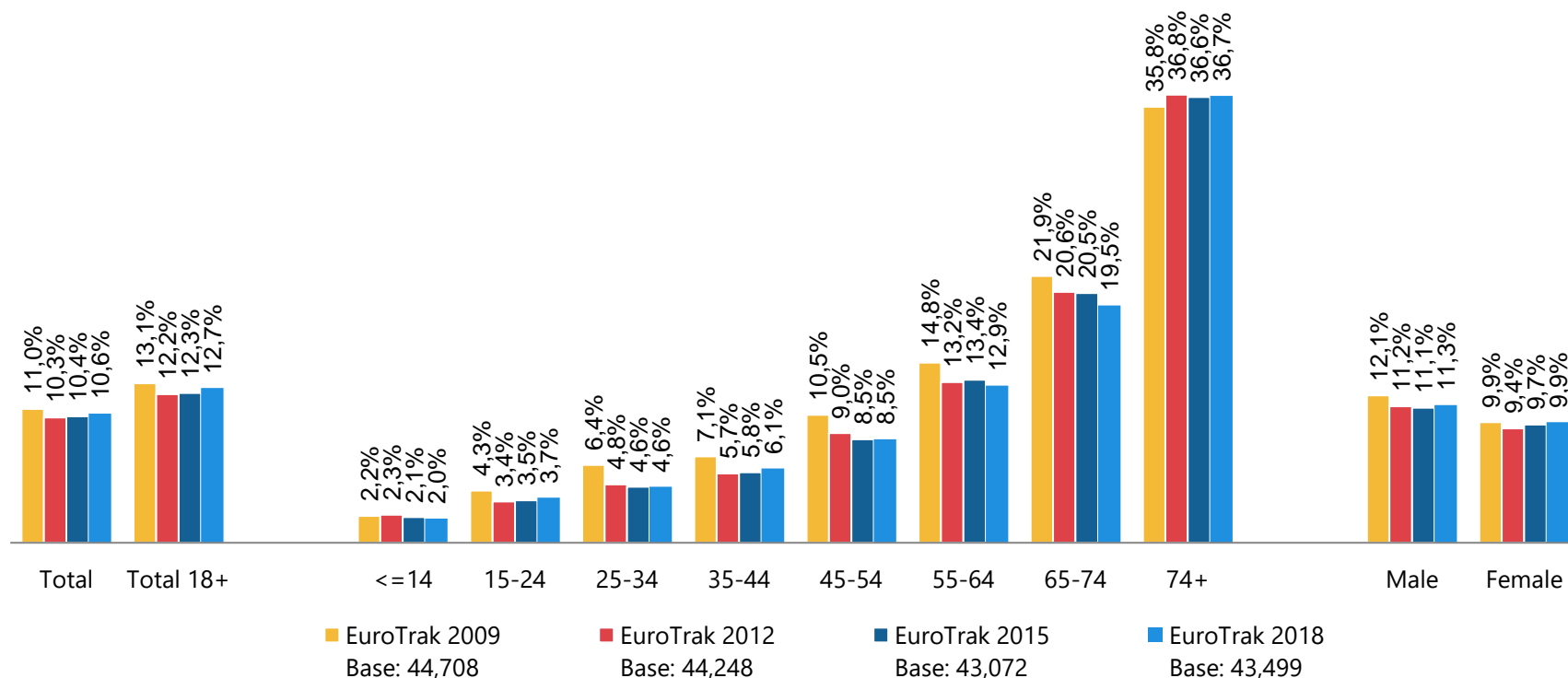
Hearing impaired (sample 2)

		EuroTrak I (2009)	EuroTrak II (2012)	EuroTrak III (2015)	EuroTrak IV (2018/20)	Total
HA owners	UK	513	501	605	698	2'317
	Germany	503	500	505	536	2'044
	France	501	502	501	550	2'054
	Italy	-	-	-	509	509
	Spain	-	-	-	502	502
Impaired non-owners	UK	822	795	720	602	2'939
	Germany	805	864	799	766	3'234
	France	803	809	819	761	3'192
	Italy	-	-	-	823	823
	Spain	-	-	-	800	800
HA owners	Total	1'517	1'503	1'611	2'795	7'426
Impaired non-owners	Total	2'430	2'468	2'338	3'752	10'988
All impaired	Total	3'947	3'971	3'949	6'547	18'414

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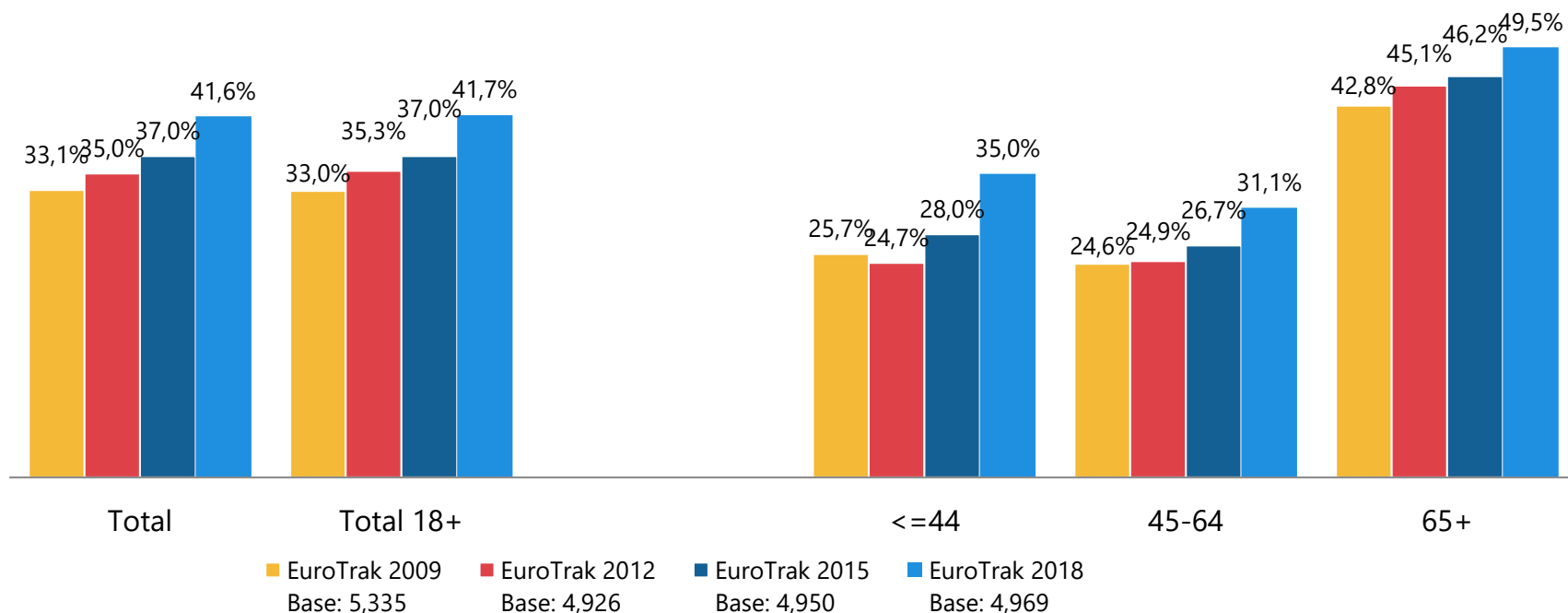
Hearing loss prevalence remains stable

% hearing loss prevalence



Hearing aid adoption increases

% of hearing impaired



HL sixtiles: how is degree of hearing loss defined?

- Self-reported !!
- 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, Moderate, Severe, 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)



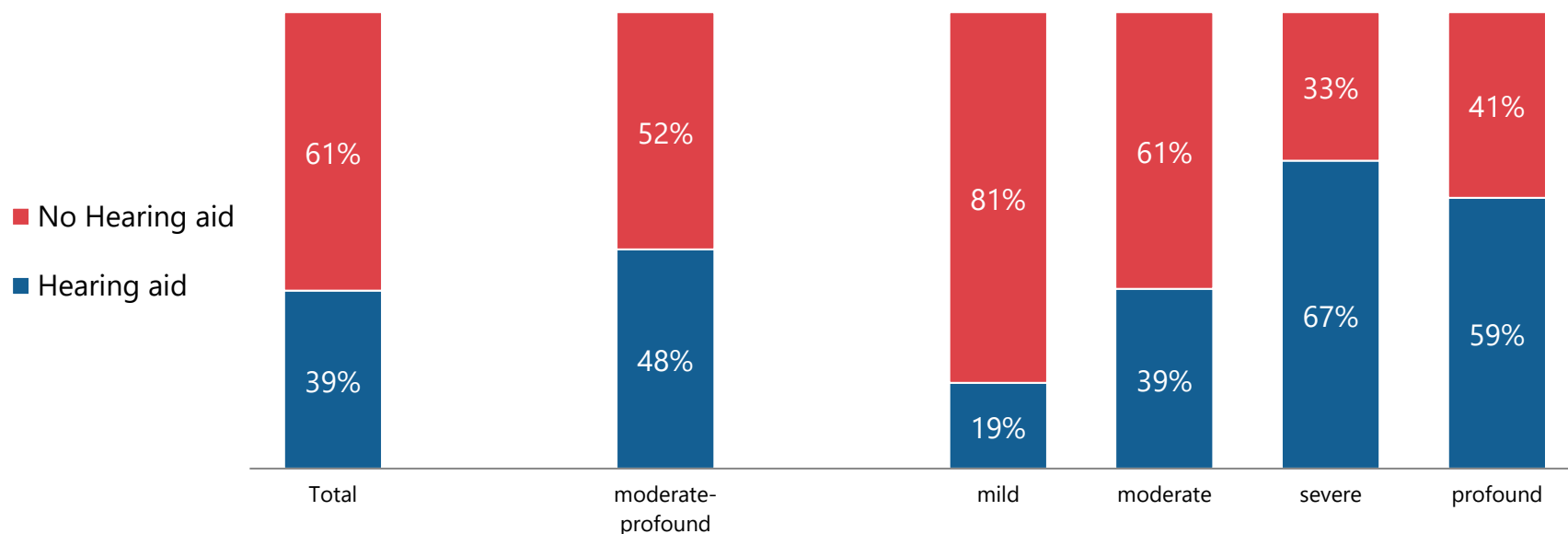
*

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
I have trouble understanding things on TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have trouble hearing conversations in a noisy background such as a crowded room or restaurant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Family members and friends have told me they think I may have a hearing loss	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have trouble following the conversation when two or more people are talking at the same time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I get confused about where sounds come from	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have trouble understanding the speaker in a large room such as at a meeting or place of worship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Adoption by degree of HL (self declared*)

mild – moderate – severe - profound

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*

How would you describe the degree of your hearing difficulty?

- ☐ Mild
- ☐ Moderate
- ☐ Severe
- ☐ Profound

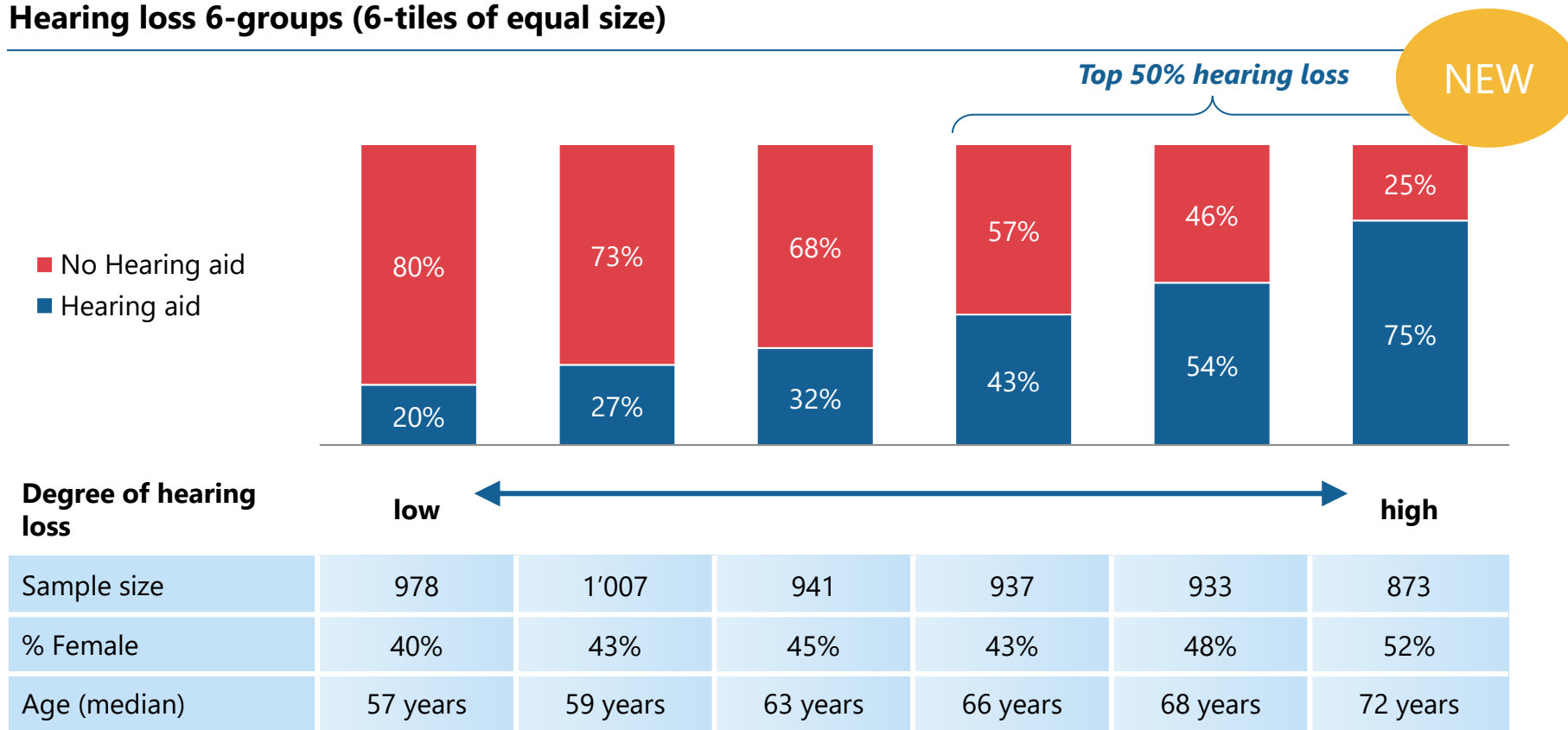
Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing impaired
N=6'547

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



Hearing loss 6-groups (6-tiles of equal size)



Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing impaired
 N=5'669

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Hearing aid satisfaction & usage

Positive impacts

Perceived product performance is key driver for satisfaction

Satisfaction

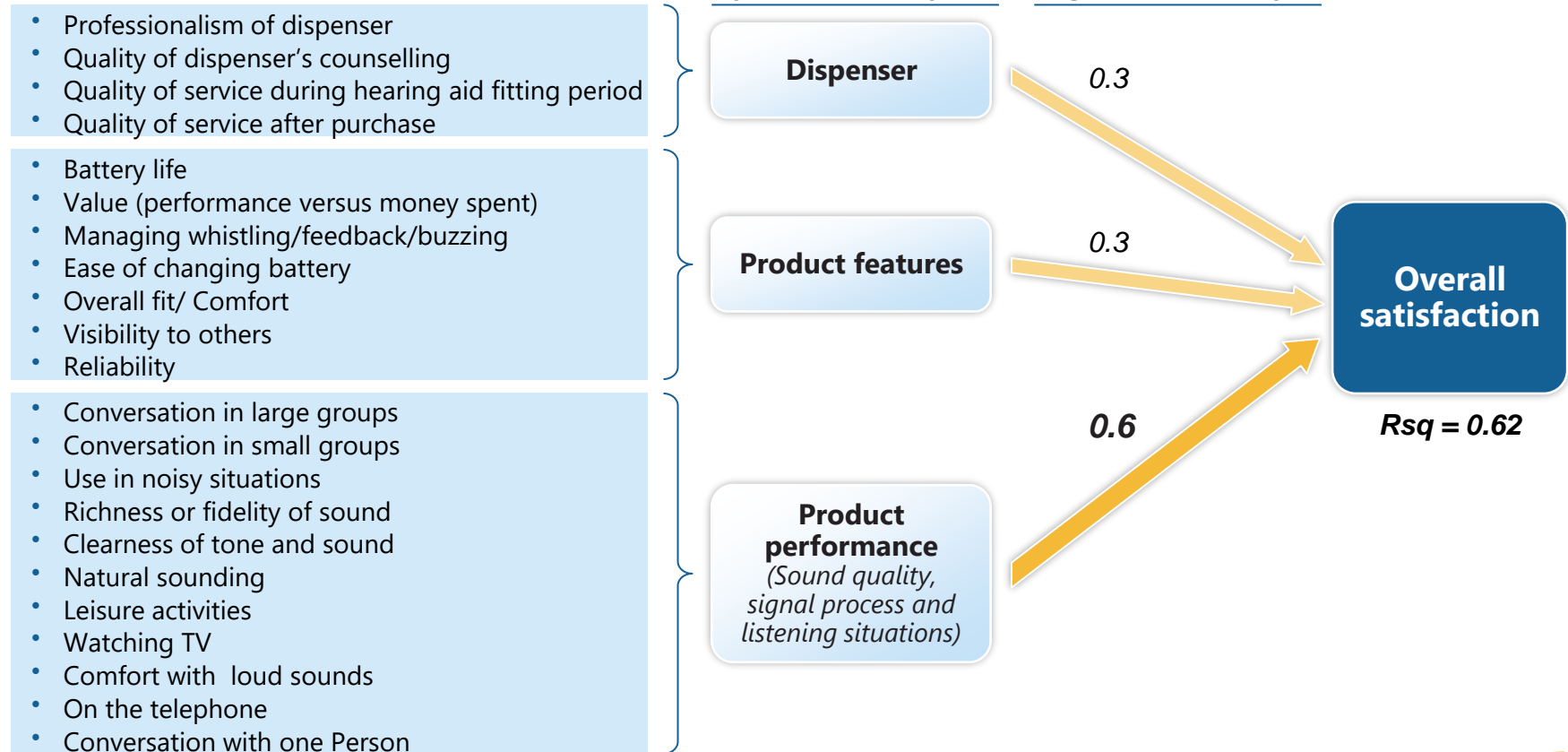
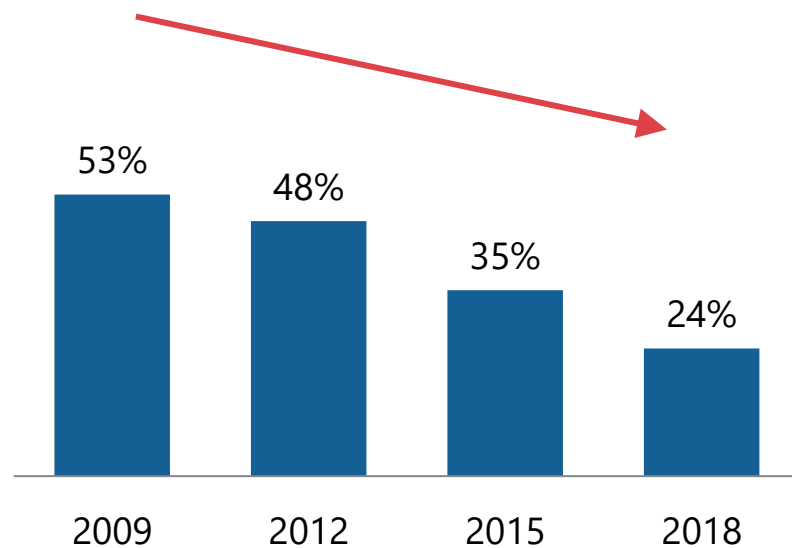
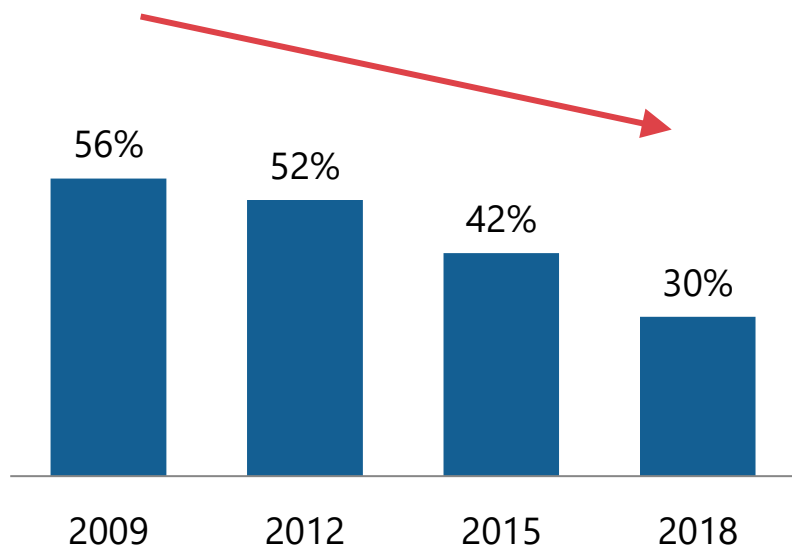


Image of hearing aids is improving

Reasons for not having a HA (top 50% HL)

Embarrassed to wear a hearing aid

Bad design



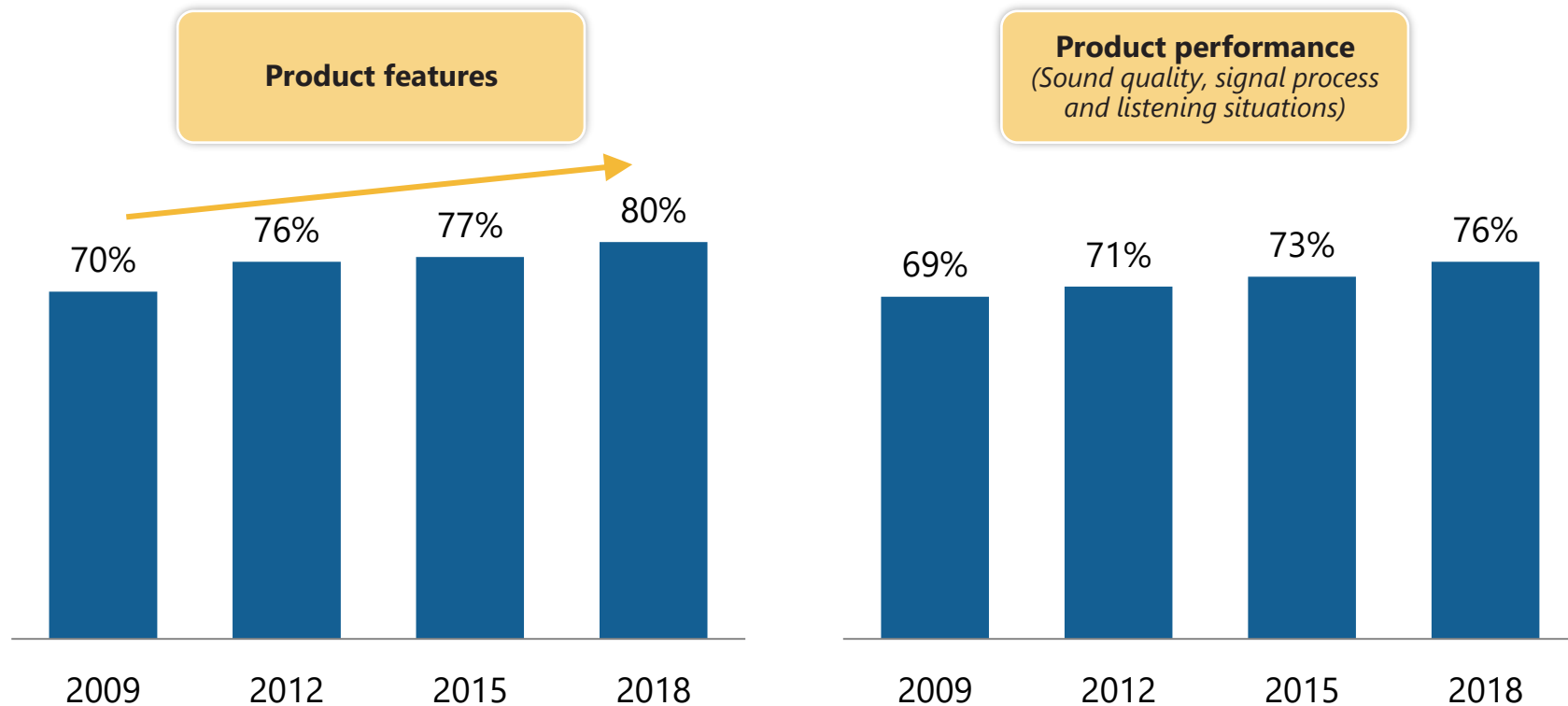
n=716/713/603/584
EuroTrak pooled data GER, FRA, UK, 2009, 2012, 2015, 2018

Satisfaction with HA features and performance increased



Trends

% satisfied



2009 n=1'483, 2012 n=1'488, 2015 n=1,93, 2018 n=1'784

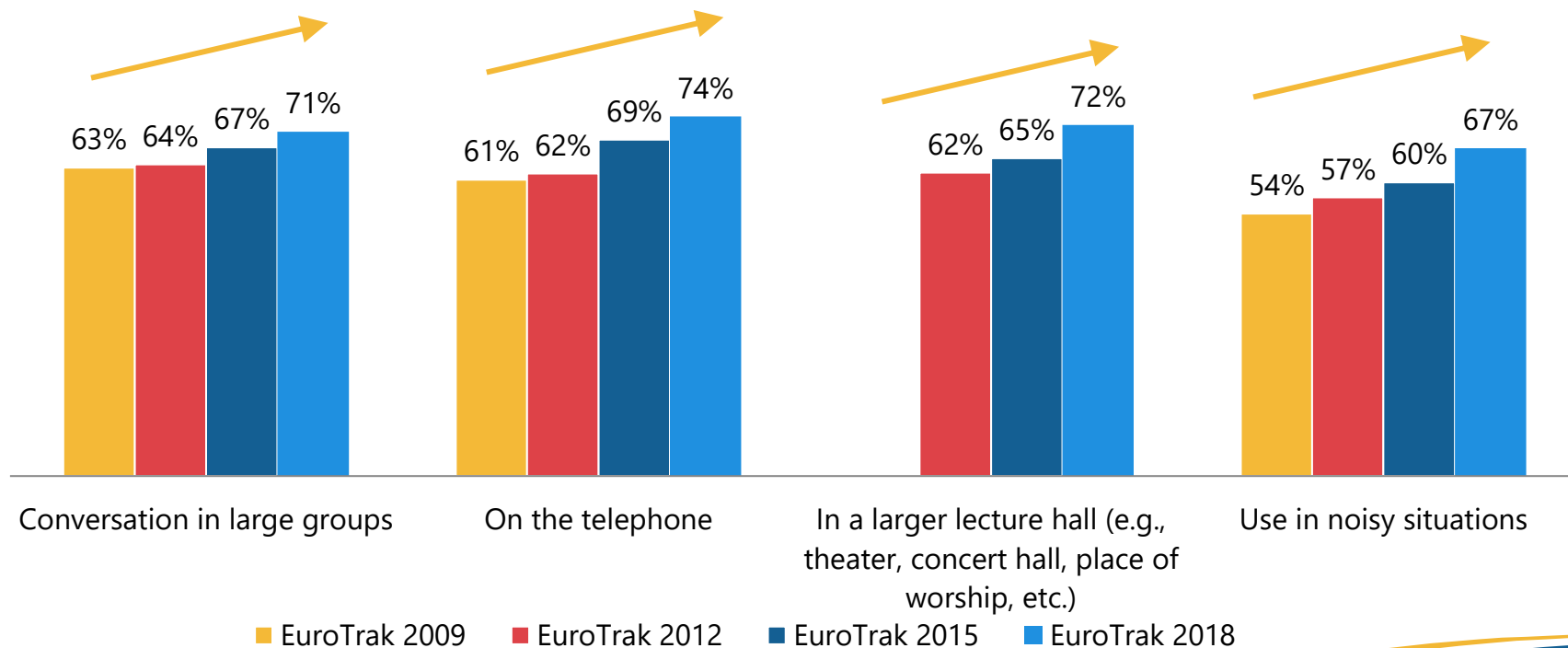
Source: EuroTrak pooled data GER, FRA, UK, **2009, 2012, 2015, 2018** Hearing aid owners

Satisfaction with HA in difficult listening situations is improving



Trends

% satisfied



2009 n=1'483, 2012 n=1'488, 2015 n=1,93, 2018 n=1'784

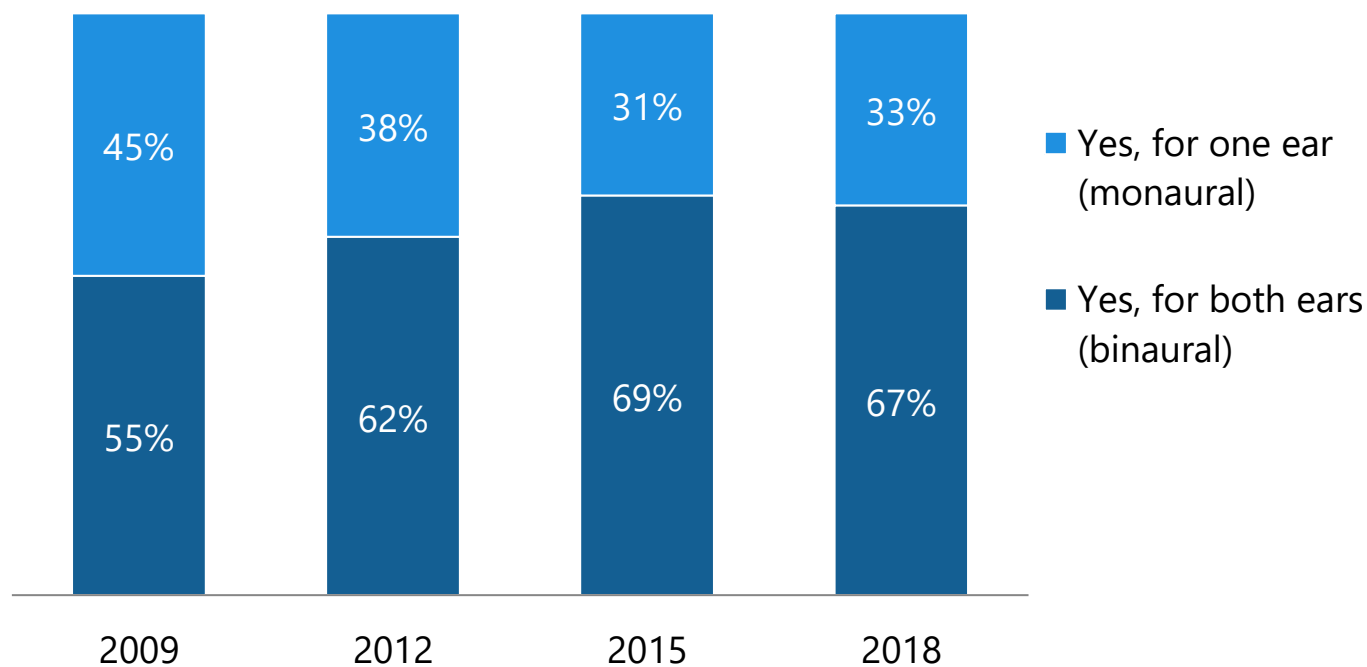
Source: EuroTrak pooled data GER, FRA, UK, **2009, 2012, 2015, 2018** Hearing aid owners



Binaural fitting rate increased from 2009 to 2015



Do you own or use a hearing aid?



2009 n=1'744

2012 n=1'719

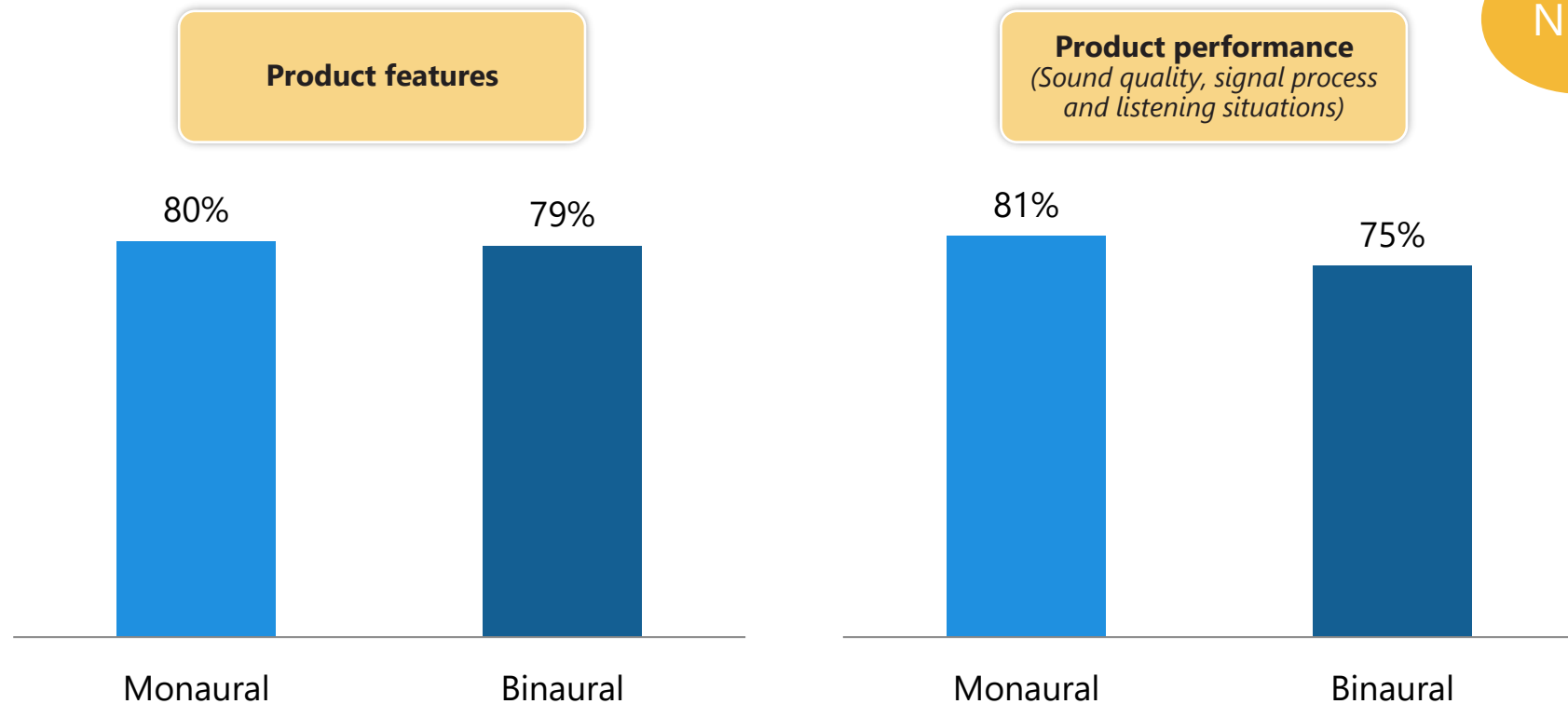
2015 n=1'826

2018 n=2'059

Source: EuroTrak pooled data GER, FRA, UK, 2009, 2012, 2015, 2018 Hearing aid owners

Monaural vs. binaural fitting

% satisfied



Monaural n=1'175

Binaural n=1'620

Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing aid owners

Binaural fitting outperforms monaural fitting for mild hearing loss

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Degree of hearing loss (self stated)	Binaural fitting % satisfied	Monaural fitting % satisfied
Mild	82% n=172	75% n=204
Moderate	79% n=839	81% n=614
Severe	76% n=485	79% n=273
Profound	67% n=101	71% n=54

Monaural n=1'175

Binaural n=1'620

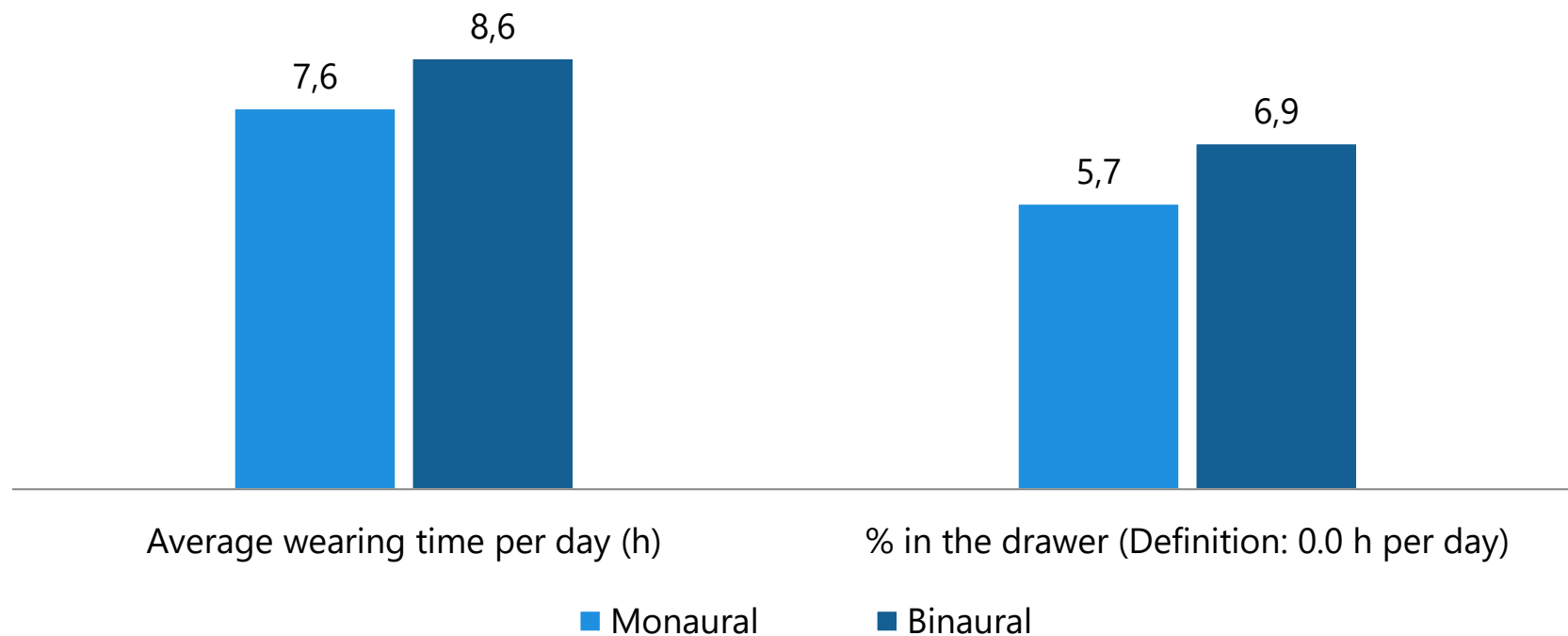
Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing aid owners

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Binaurally fitted use their hearing aids more

Approximately how many hours a day do you wear your hearing aids?

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Monaural n=1'175

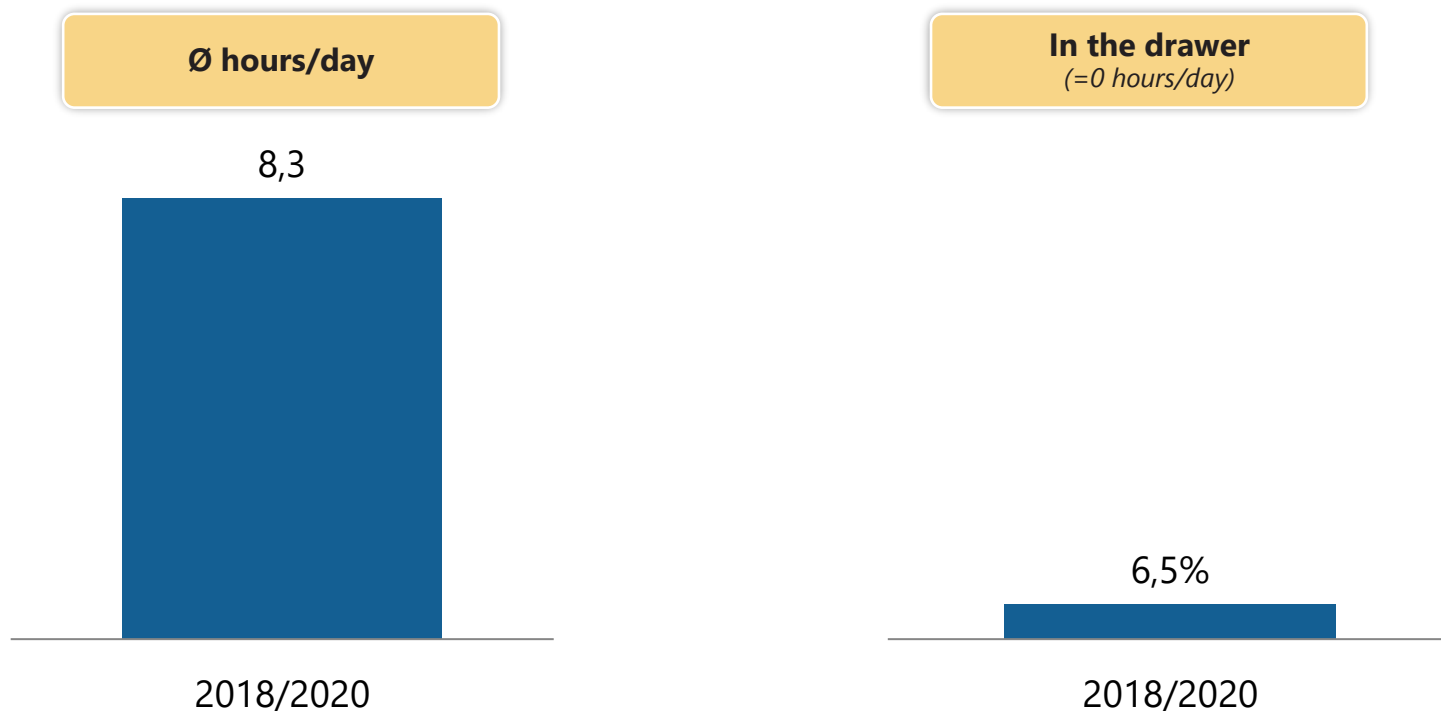
Binaural n=1'620

Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing aid owners

HA usage per day

Approximately how many hours a day do you wear your hearing aids?

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2018/2020 n=2'795

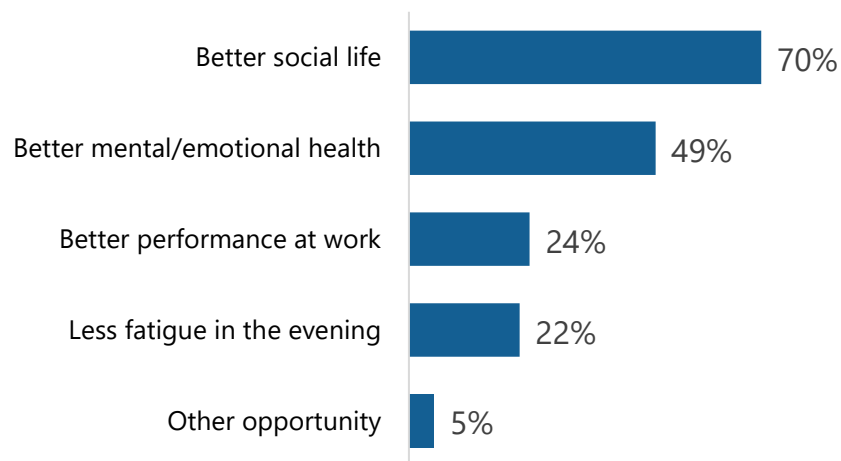
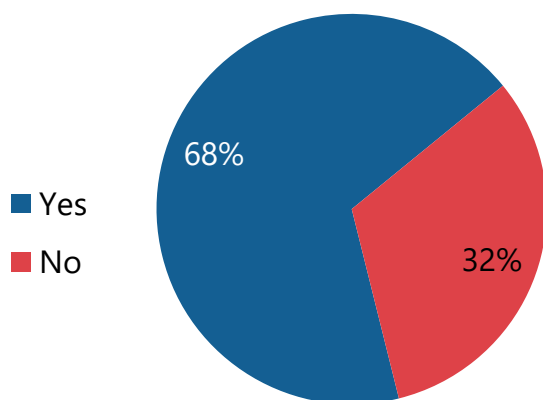
Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing aid owners

Hearing aid sooner?

Thinking back before you obtained your first hearing aid(s): do you think, you should have gotten them sooner?

What are the reasons why you think you should have gotten your hearing aid(s) sooner? What are the opportunities you think you have missed because

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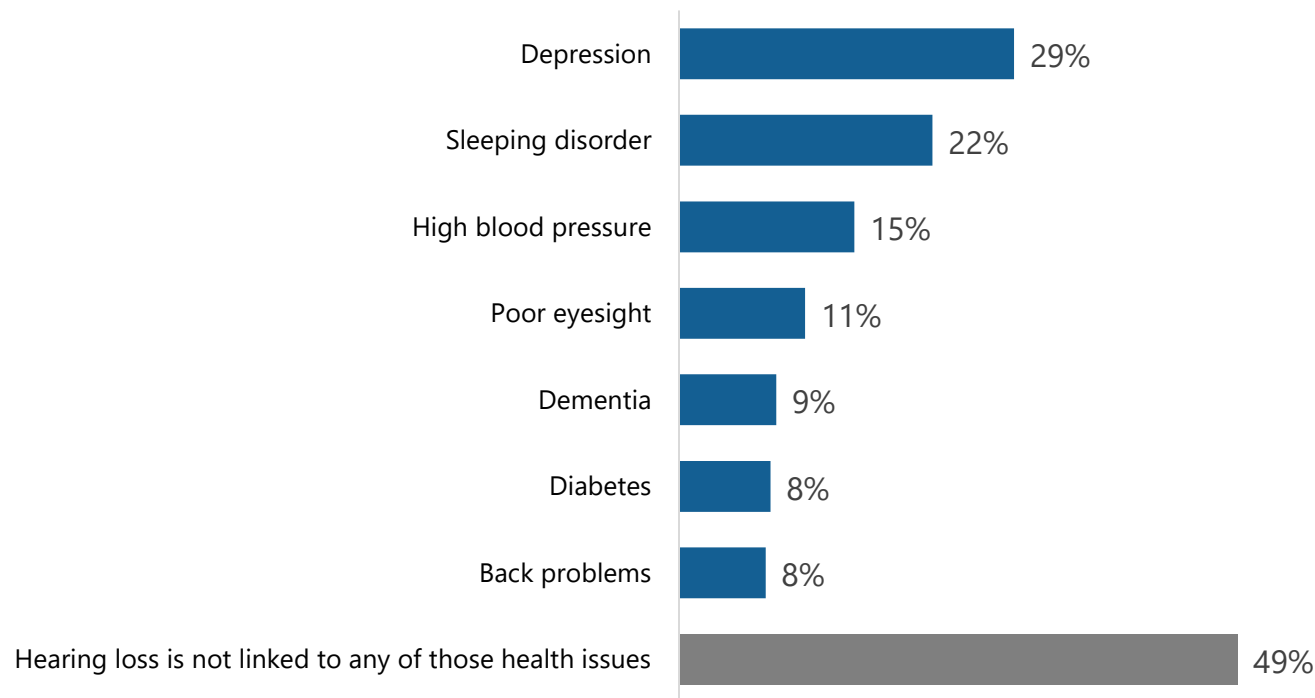
Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing aid owners
N=2'795 / 1'682

The opinion of hearing impaired people on what could be linked to one's hearing loss



Please tick all of the health issues below which you think could be linked to one's hearing loss

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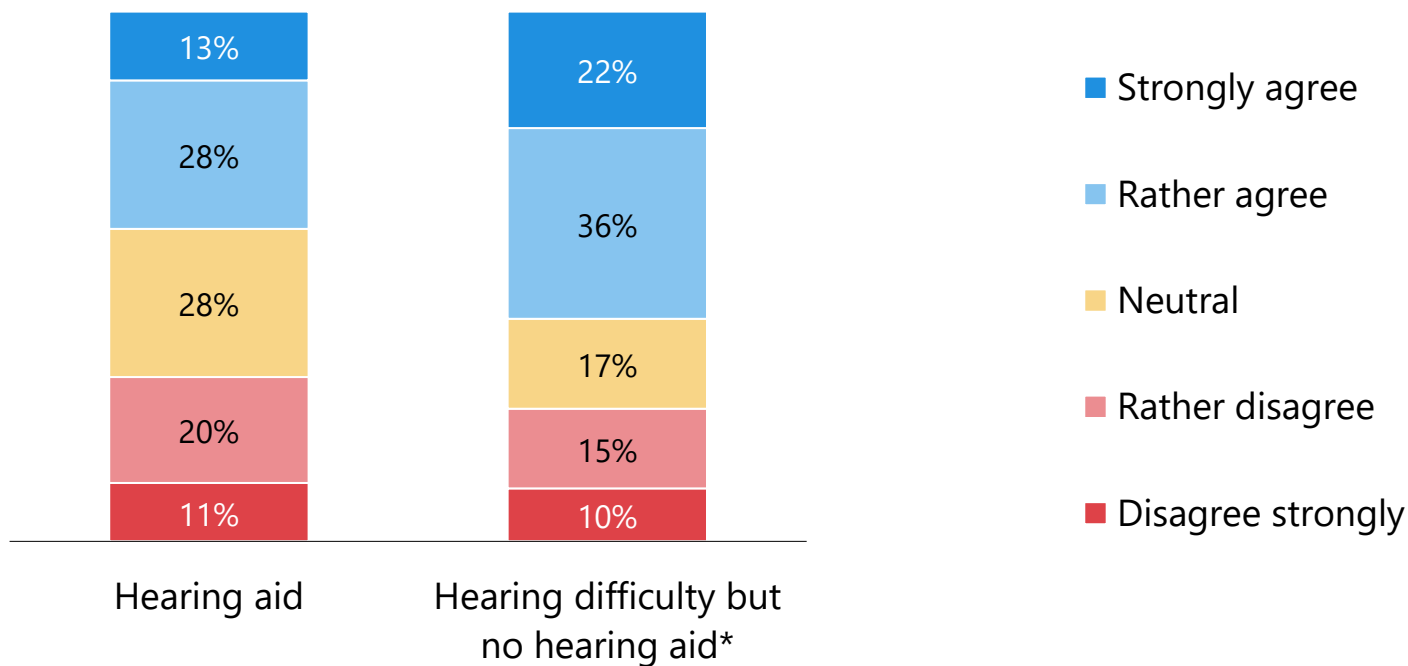


Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing impaired
N=6'323

Positive impact of HA's on physical stress

In the evenings I often feel physically exhausted

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Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing impaired

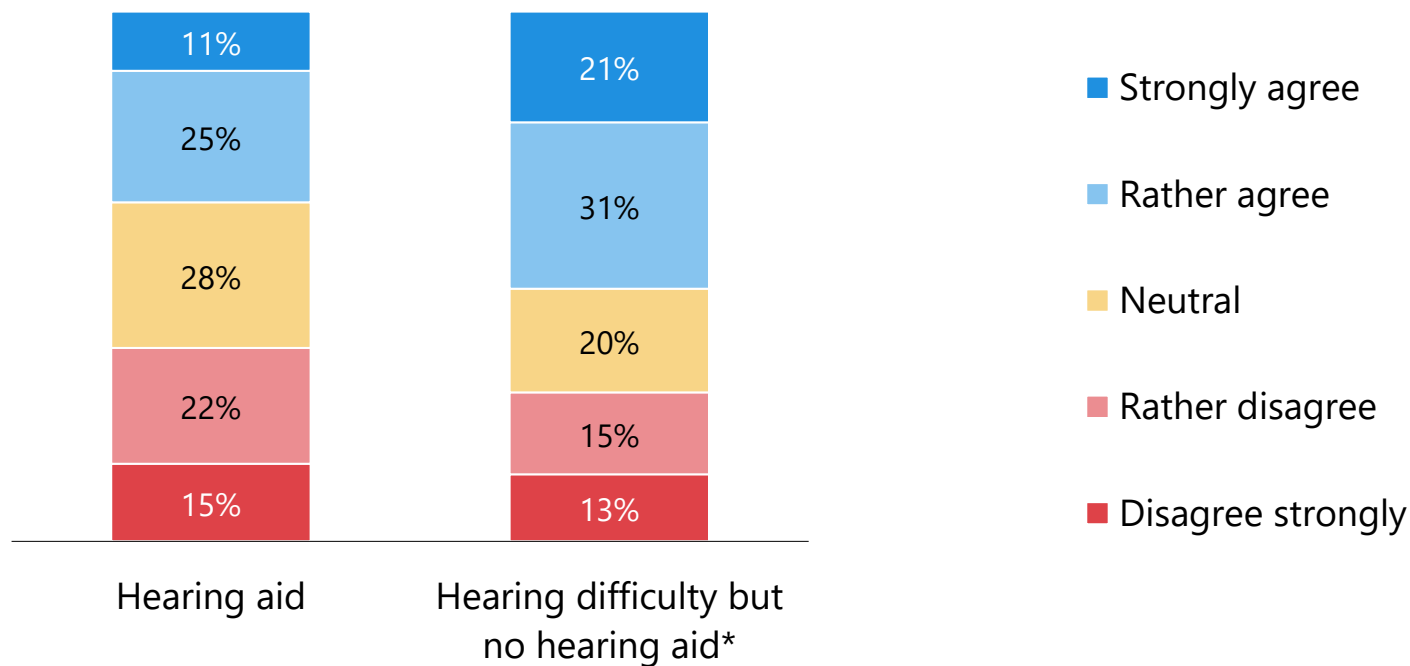
N=1'779 / 664

*top 50% HL (similar HL as HA owners)

Positive impact of HA's on mental stress

In the evenings I often feel mentally exhausted

NEW



Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing impaired

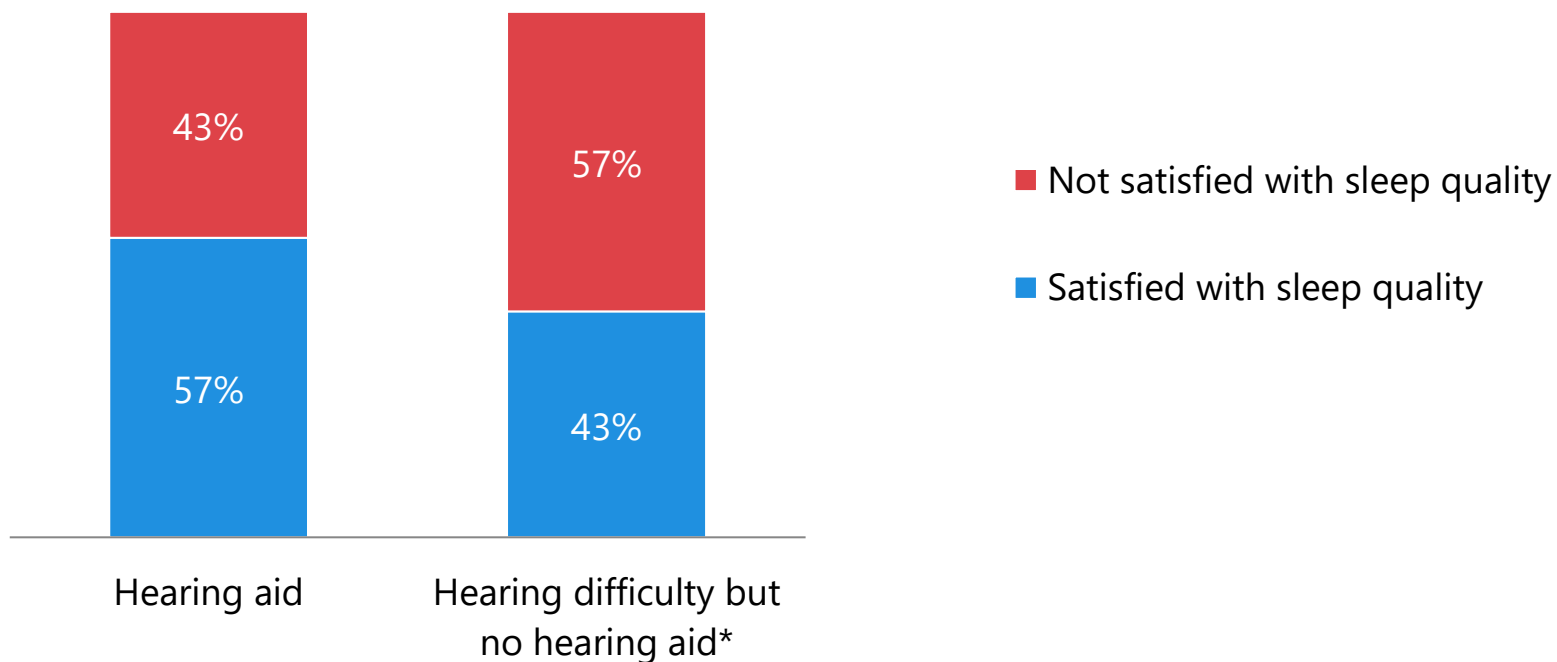
N=1'779 / 664

*top 50% HL (similar HL as HA owners)

People with hearing aids sleep better

Are you generally satisfied with the quality of your sleep?

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Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing impaired

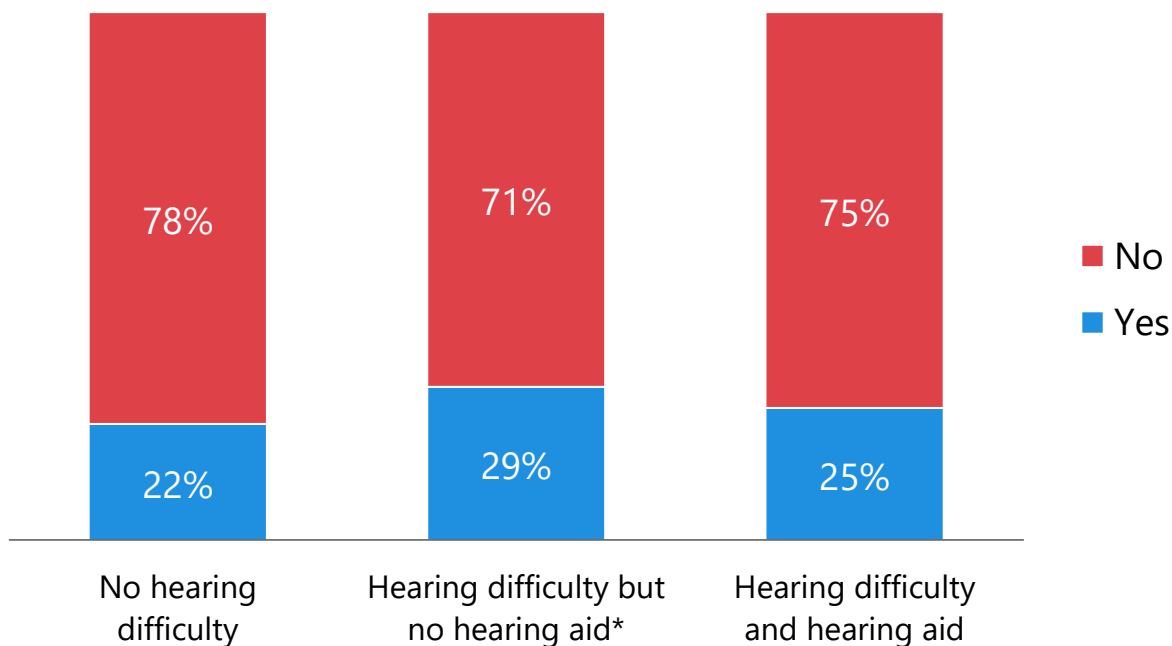
N=1'808 / 668

*top 50% HL (similar HL as HA owners)

The positive impact of HA's on depressive symptoms

Depressive symptoms (PHQ-2)

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Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020

*top 50% HL (similar HL as HA owners)

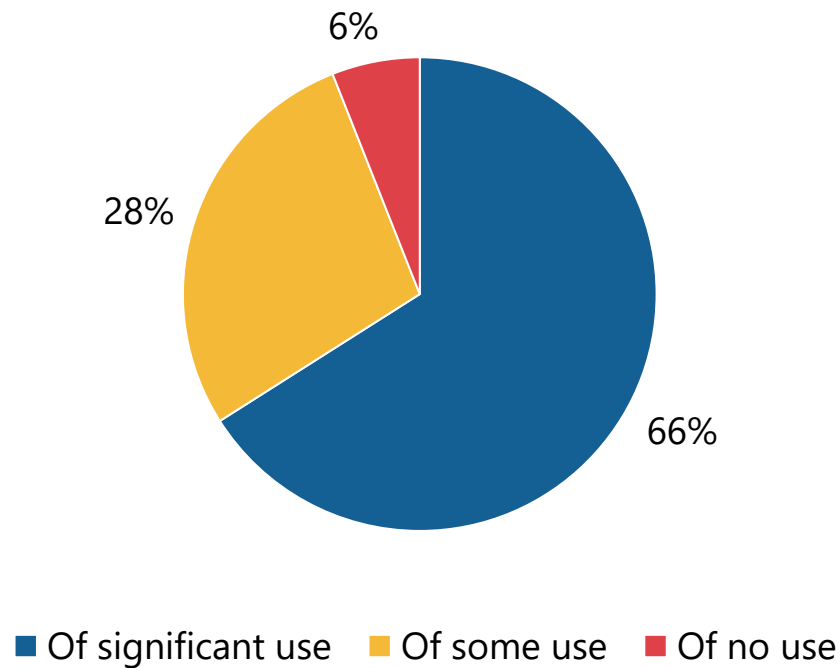
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Labour market

Hearing aids are useful on the job

How useful are your hearing aids on your job?

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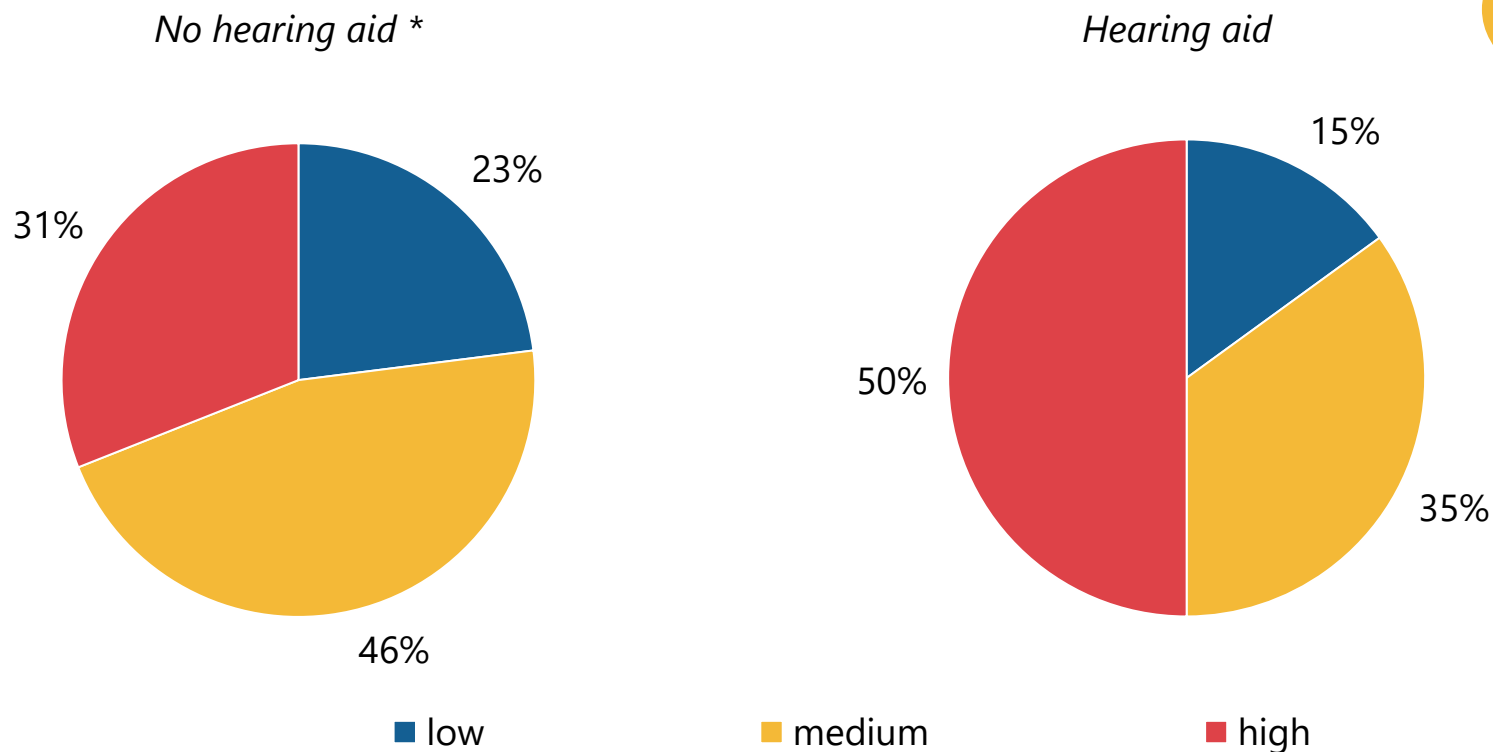


Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing aid owners
N=1'374

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Employed HA users more often earn a higher salary

What is your annual PERSONAL income before tax etc. ?



Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing aid owners

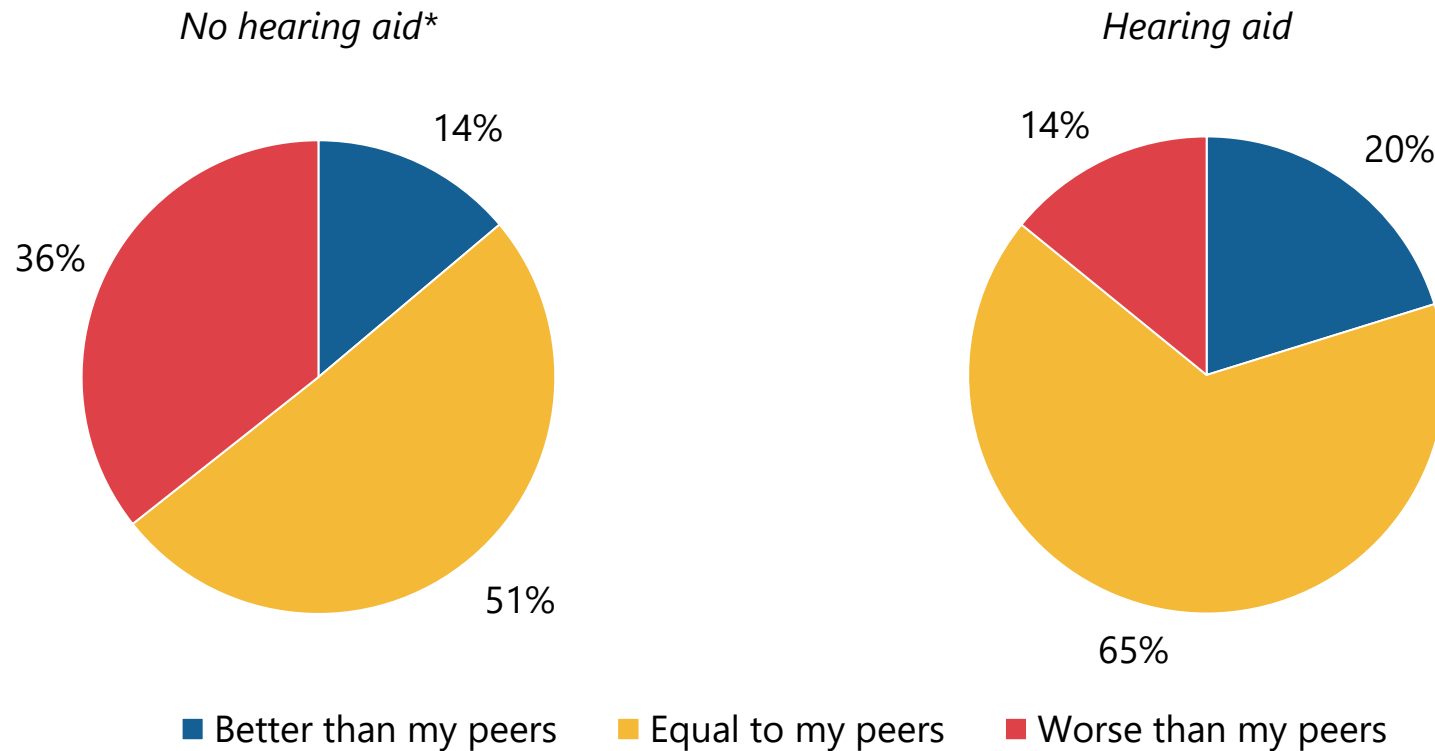
N=495 / 1'332

*top 50% HL (similar HL as HA owners)

Hearing impaired non-users declare more often to receive a worse salary than their peers



Compared to your peers of equal age, education and skill how would you rate the compensation that you receive for the job you perform?



Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing aid owners

N=496 / 1'295

*top 50% HL (similar HL as HA owners)

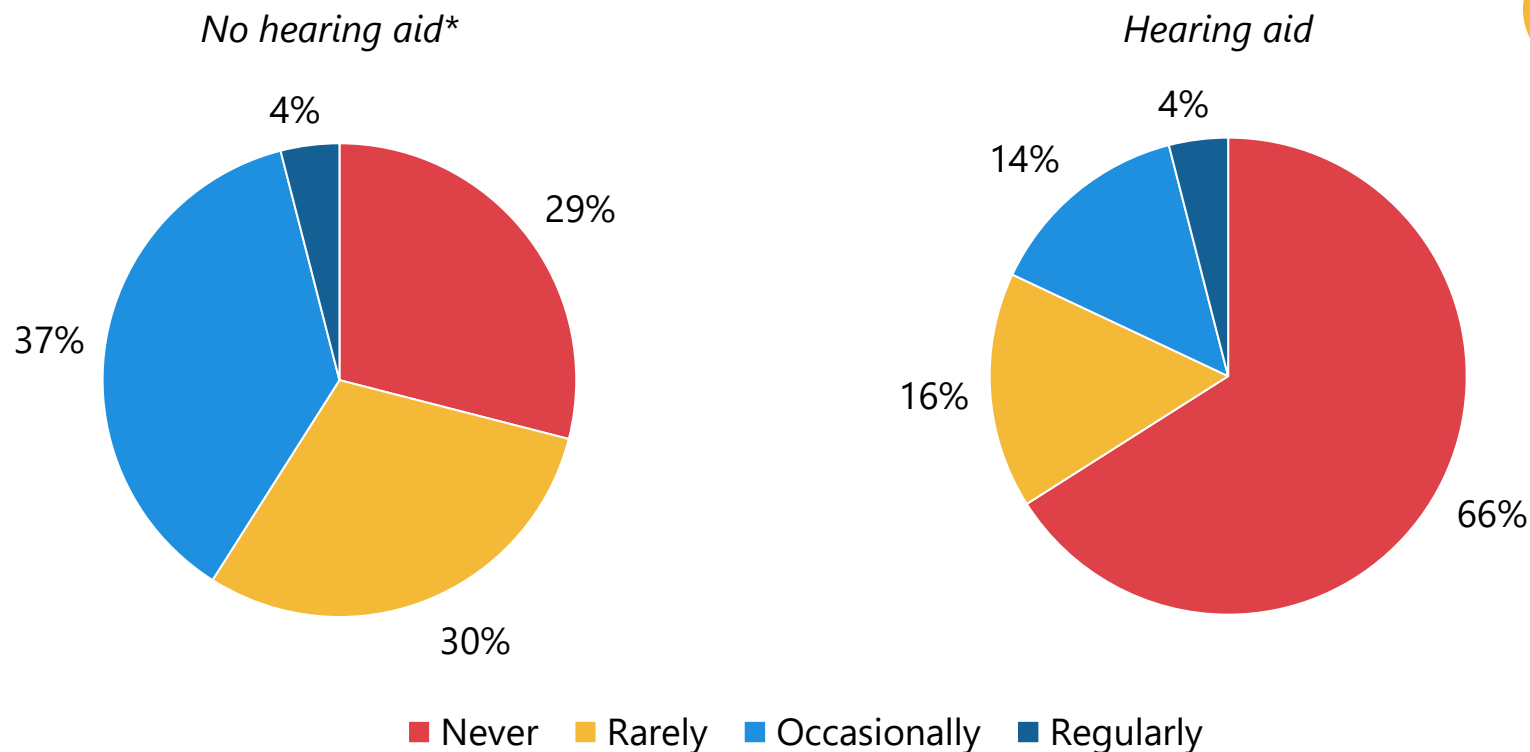
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82% of all users do not feel they're made fun of. Non-users often feel made fun of (41%)



**How often do people make fun of you because of your hearing loss?
How often do people make fun of you because of your HA's?**

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Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020

N=1'039 / 2'795

*top 50% HL (similar HL as HA owners)

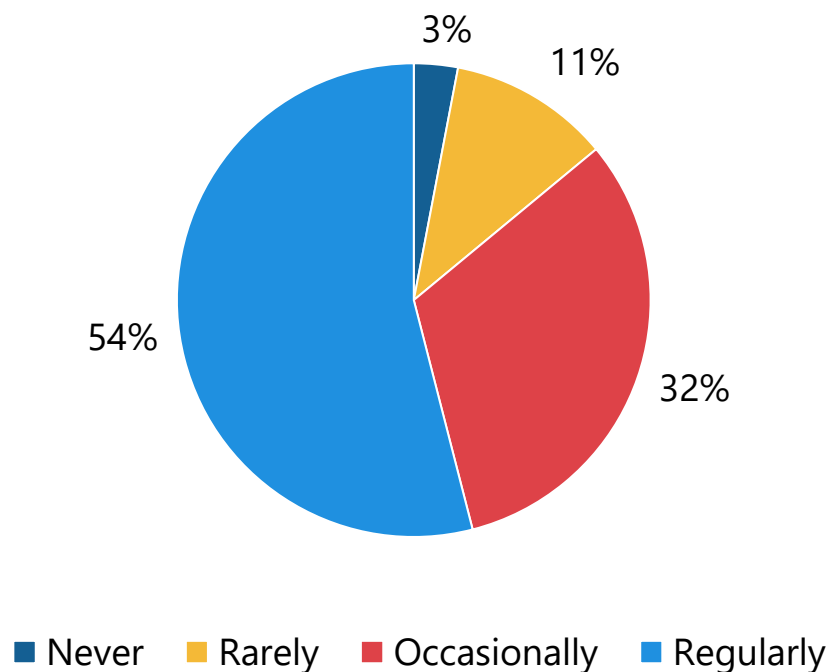
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Vast majority declare that their hearing aids improve their quality of life



How often do your hearing aids improve your quality of life?

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Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing aid owners
N=2'795

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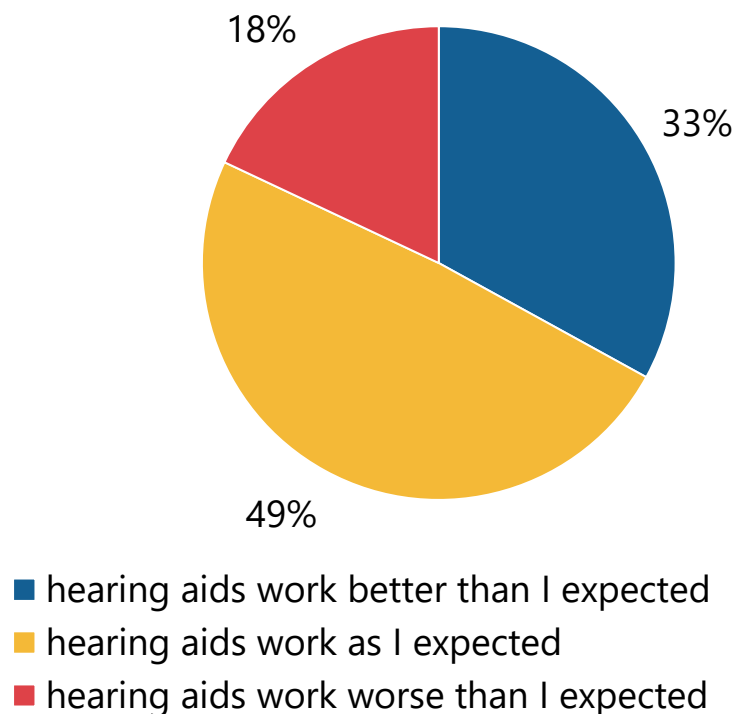


82% of the hearing aid owners say their hearing aid works better than or as expected



How have the expectations you had towards hearing aids before trying them on for the first time been met?

NEW



Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing aid owners
N=2'795

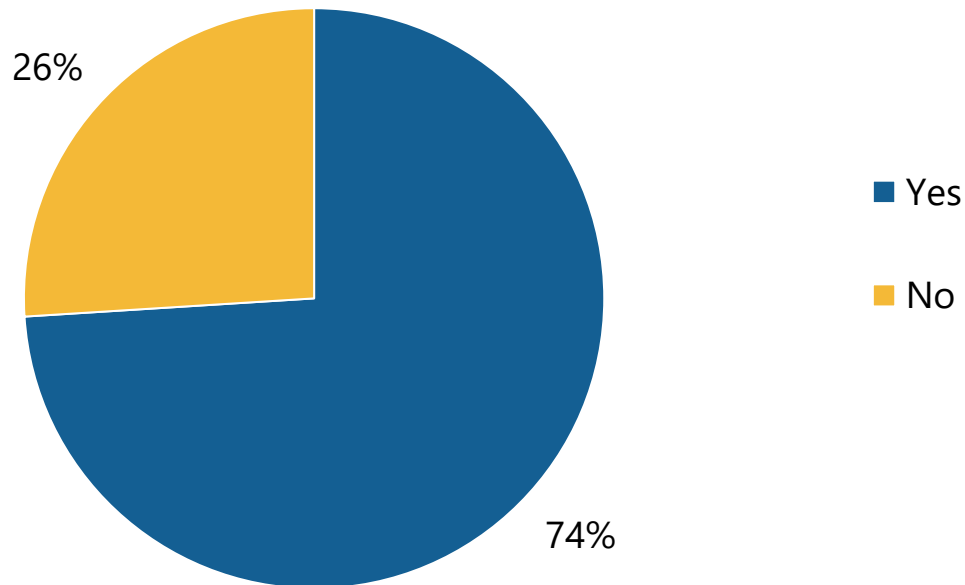
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3 out of 4 hearing aid owners feel more confident moving in a city since wearing hearing aids



Since wearing a hearing aid, do you feel more confident moving in a city, e.g. because you hear traffic signals/vehicles approaching?

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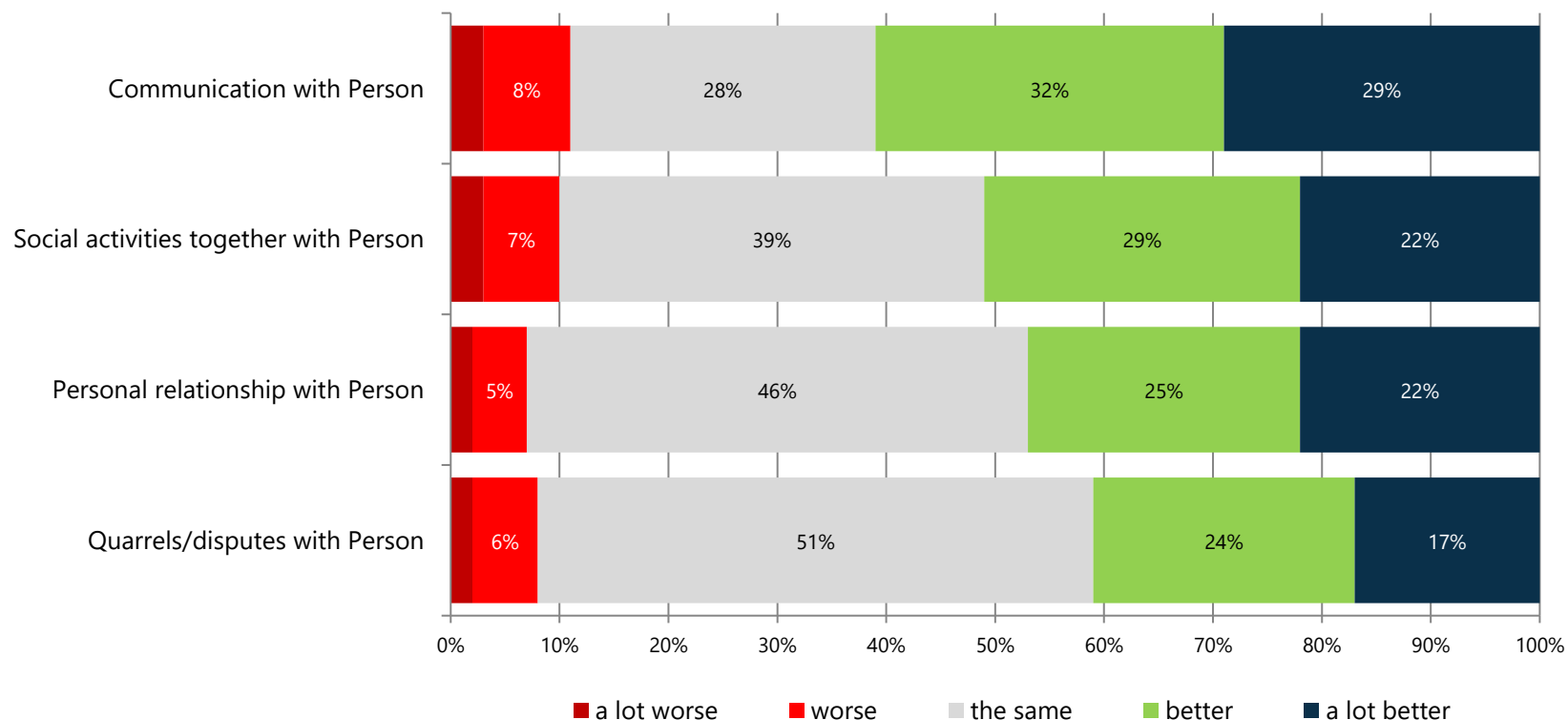


Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Hearing aid owners
N=2'795

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Also for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids

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Source: EuroTrak pooled data GER, FRA, UK, IT, SP 2018/2020: Someone in HH / parent has HA
N=2'533



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