

Hearing Aids improve Hearing - and a LOT more

Trends derived from the EuroTrak databases
2009 - 2018

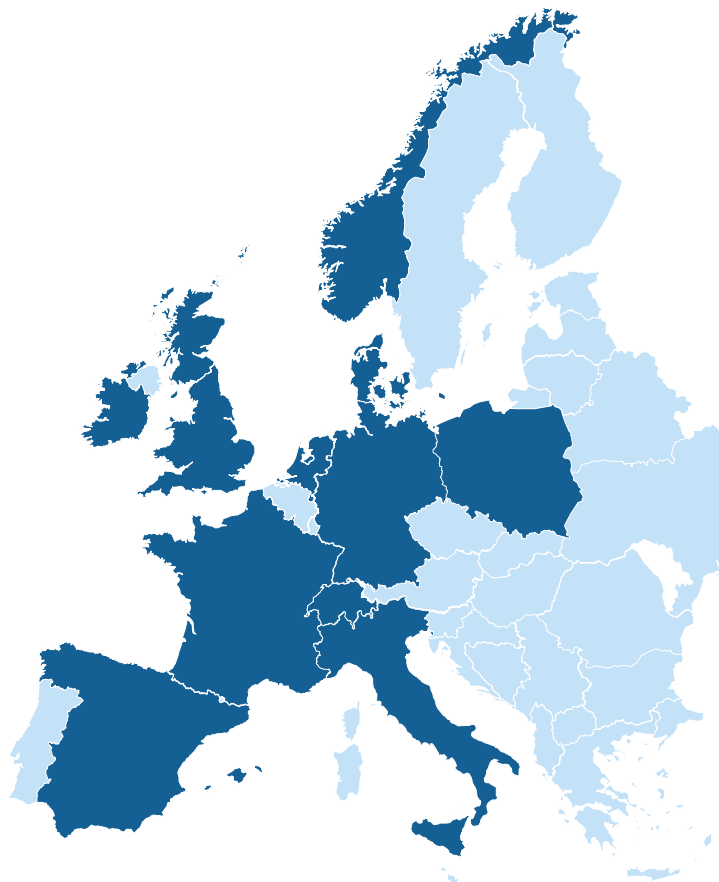
March, 2019

EuroTrak



- 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
- Repeated every 3 years to generate trends over time

Status 2019



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

Pooled data: Total sample sizes

Representative sample (sample 1)

	EuroTrak I (2009)	EuroTrak II (2012)	EuroTrak III (2015)	EuroTrak IV (2018)	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
Total	44,708	44,248	43,072	43,499	175,527

Pooled data: Hearing impaired sample sizes

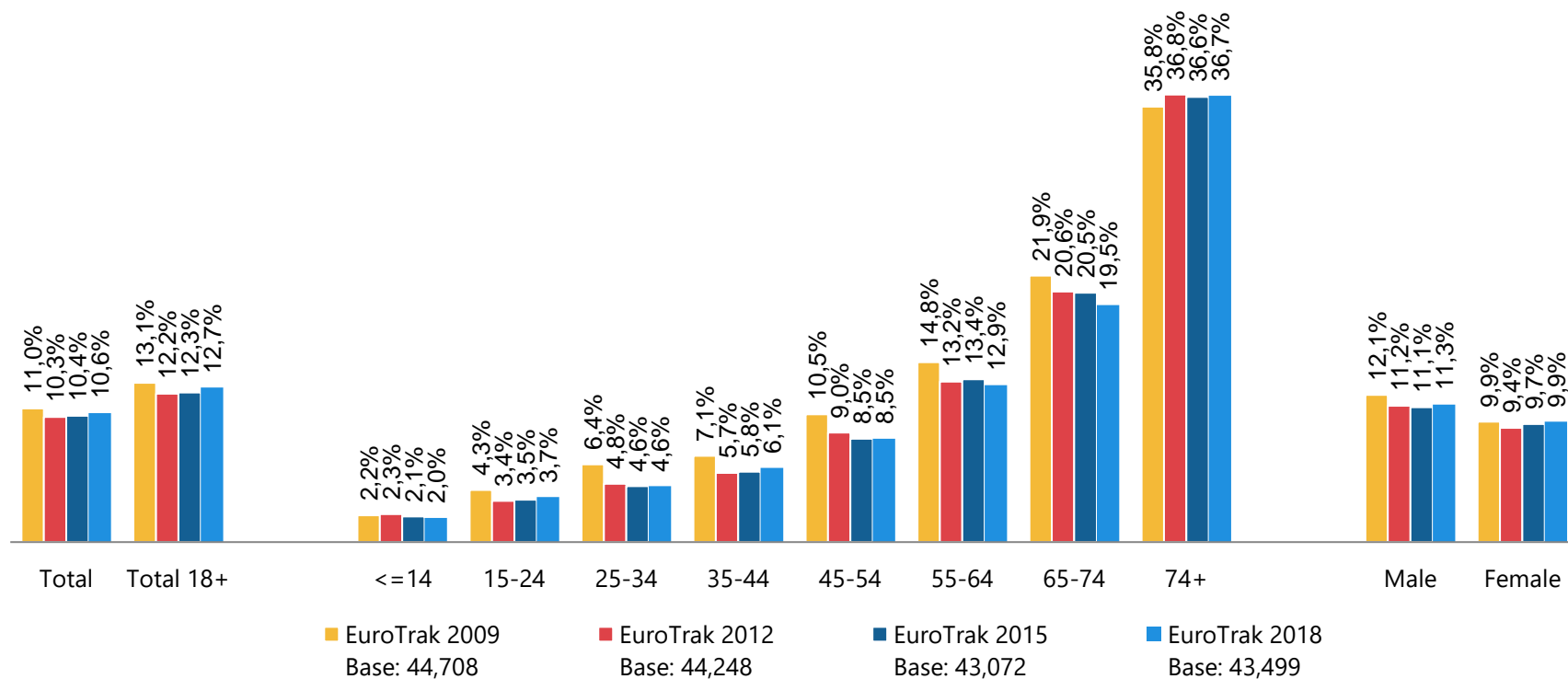


Hearing impaired (sample 2)

		EuroTrak I (2009)	EuroTrak II (2012)	EuroTrak III (2015)	EuroTrak IV (2018)	Total
HA owners	UK	513	501	605	698	2,317
	Germany	503	500	505	536	2,044
	France	501	502	501	550	2,054
Impaired non-owners	UK	822	795	720	602	2,939
	Germany	805	864	799	766	3,234
	France	803	809	819	761	3,192
HA owners	Total	1,517	1,503	1,611	1,784	6,415
Impaired non-owners	Total	2,430	2,468	2,338	2,129	9,365
All impaired	Total	3,947	3,971	3,949	3,913	15,780

Hearing loss prevalence remains stable

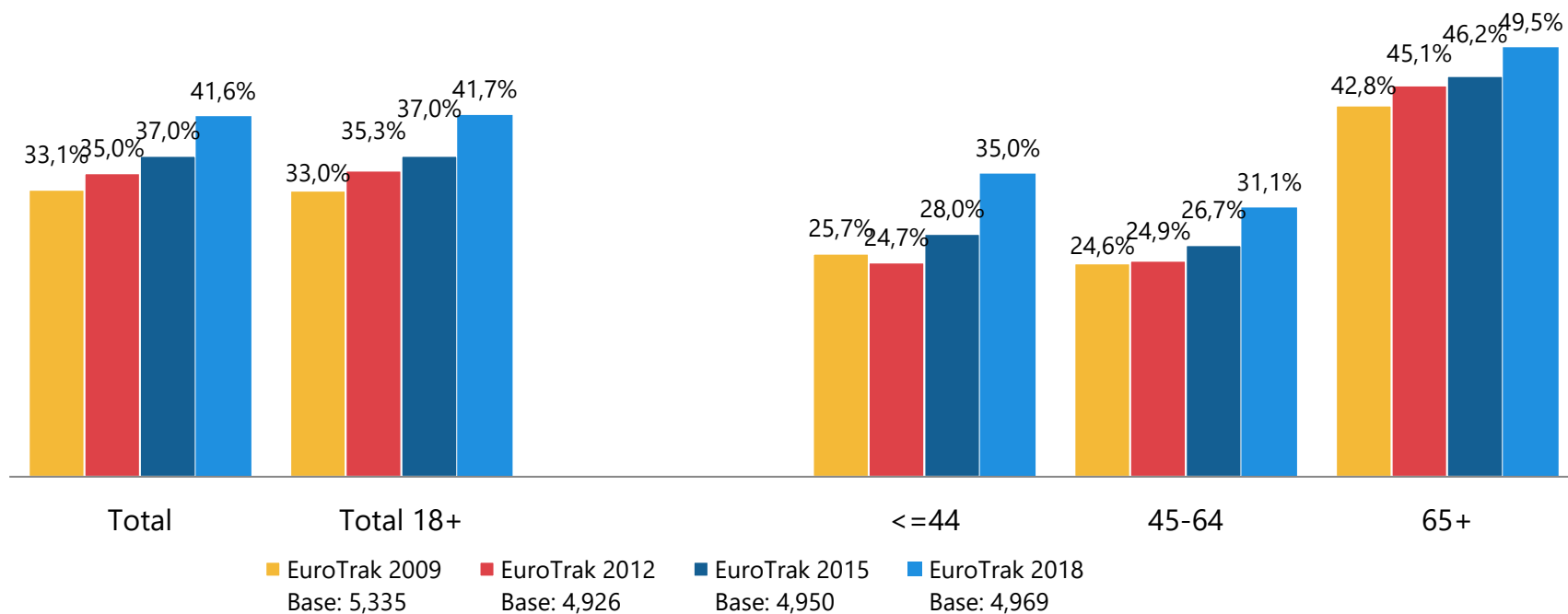
% hearing loss prevalence



Hearing aid adoption increases



% of hearing impaired



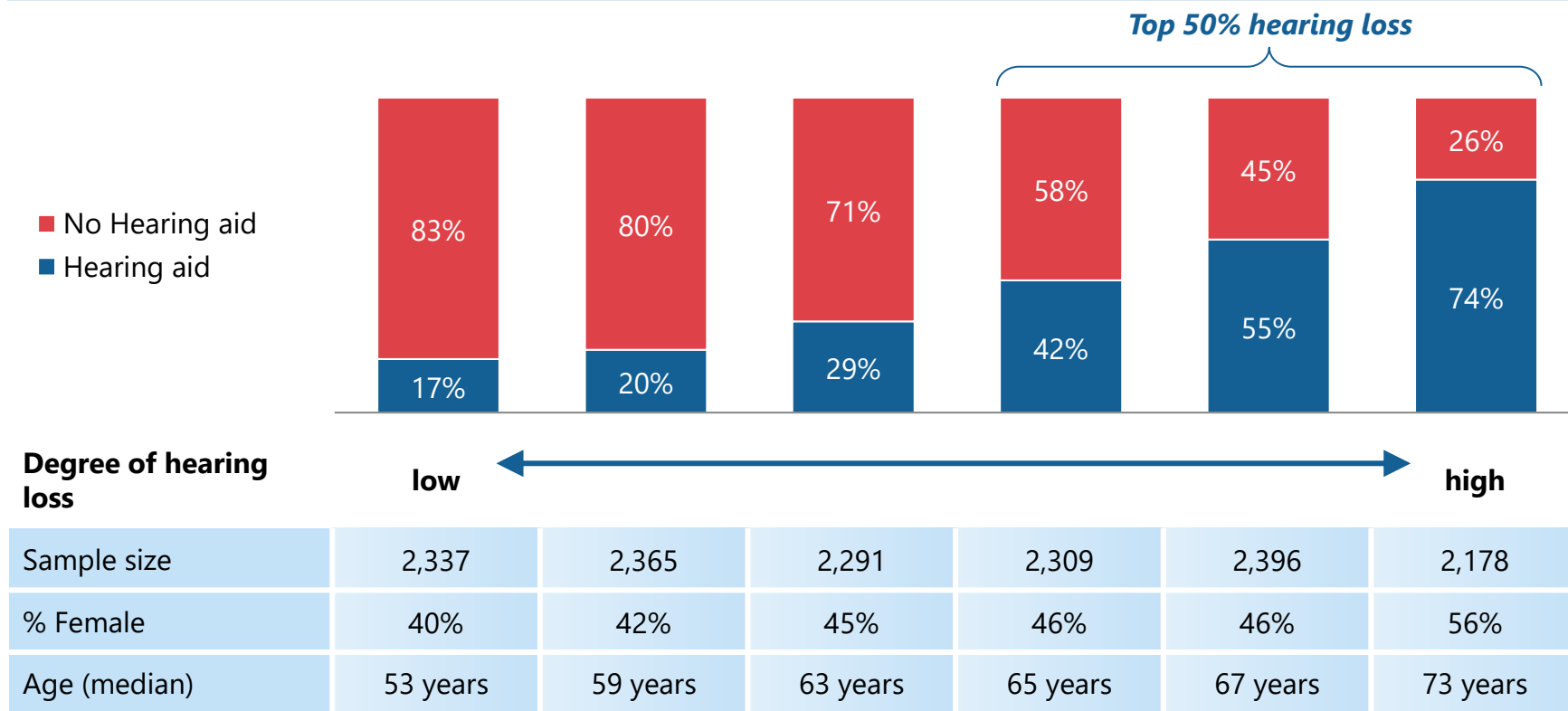
How is degree of hearing loss defined?

- 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)

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



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



Hearing aid satisfaction & usage

Positive impacts

Perceived product performance is key driver for satisfaction



Satisfaction

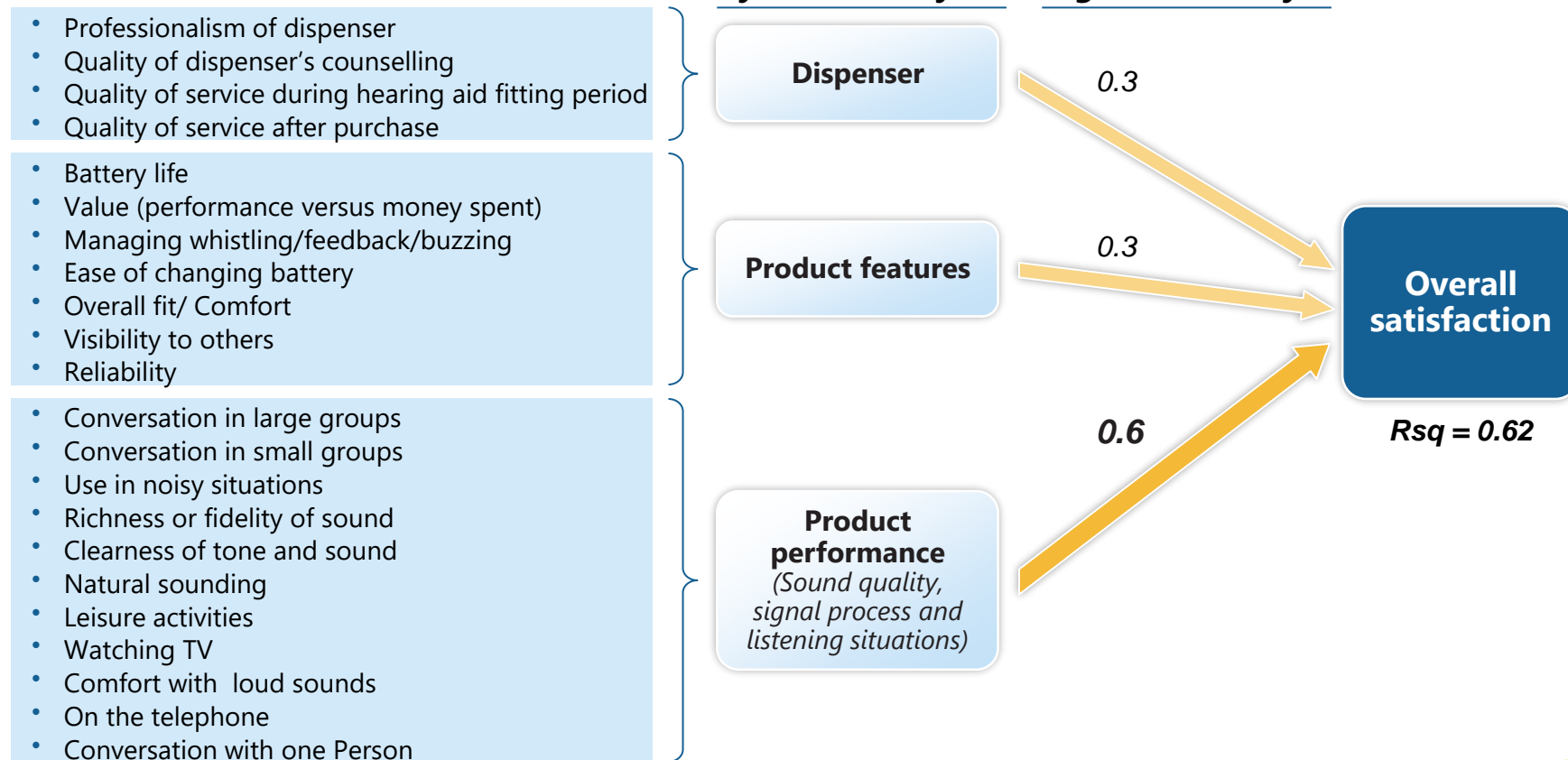
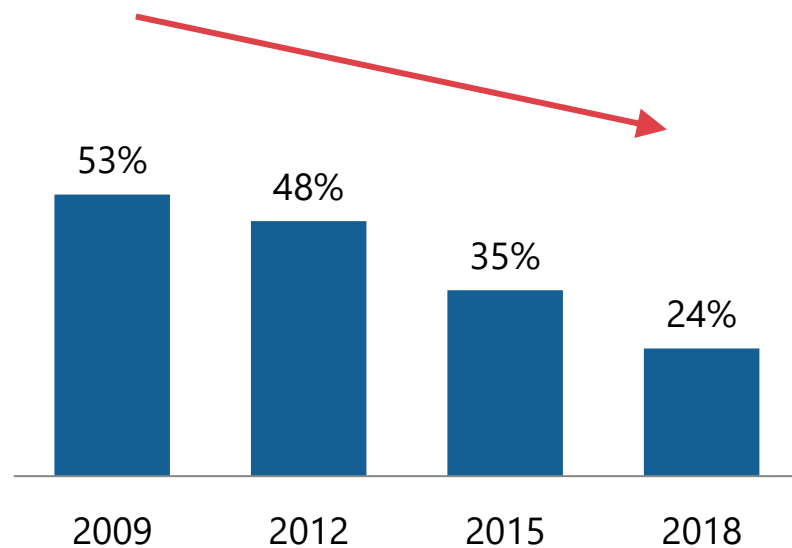
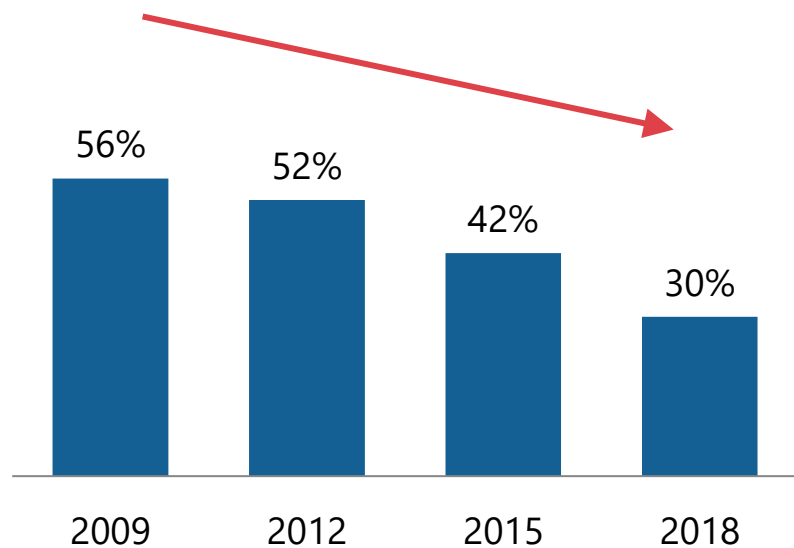


Image of hearing aids is improving

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

Embarrassed to wear a hearing aid

Bad design



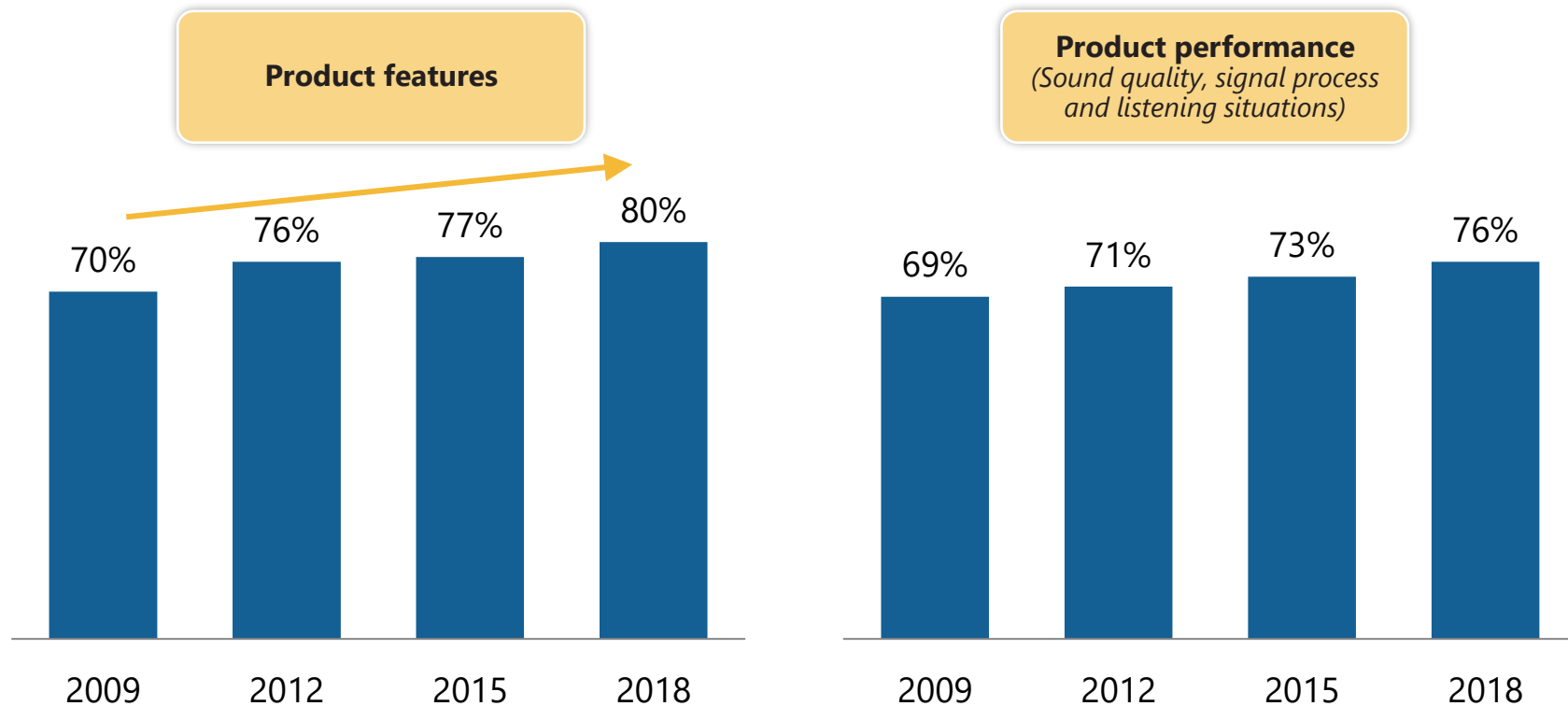
n=716/713/603/584
EuroTrak pooled data GER, FRA, UK, 2009, 2012, 2015, 2018

Satisfaction with HA features and performance increased



Trends

% satisfied



2009 n=1,483, 2012 n=1,488, 2015 n=1,593, 2018 n=1,784

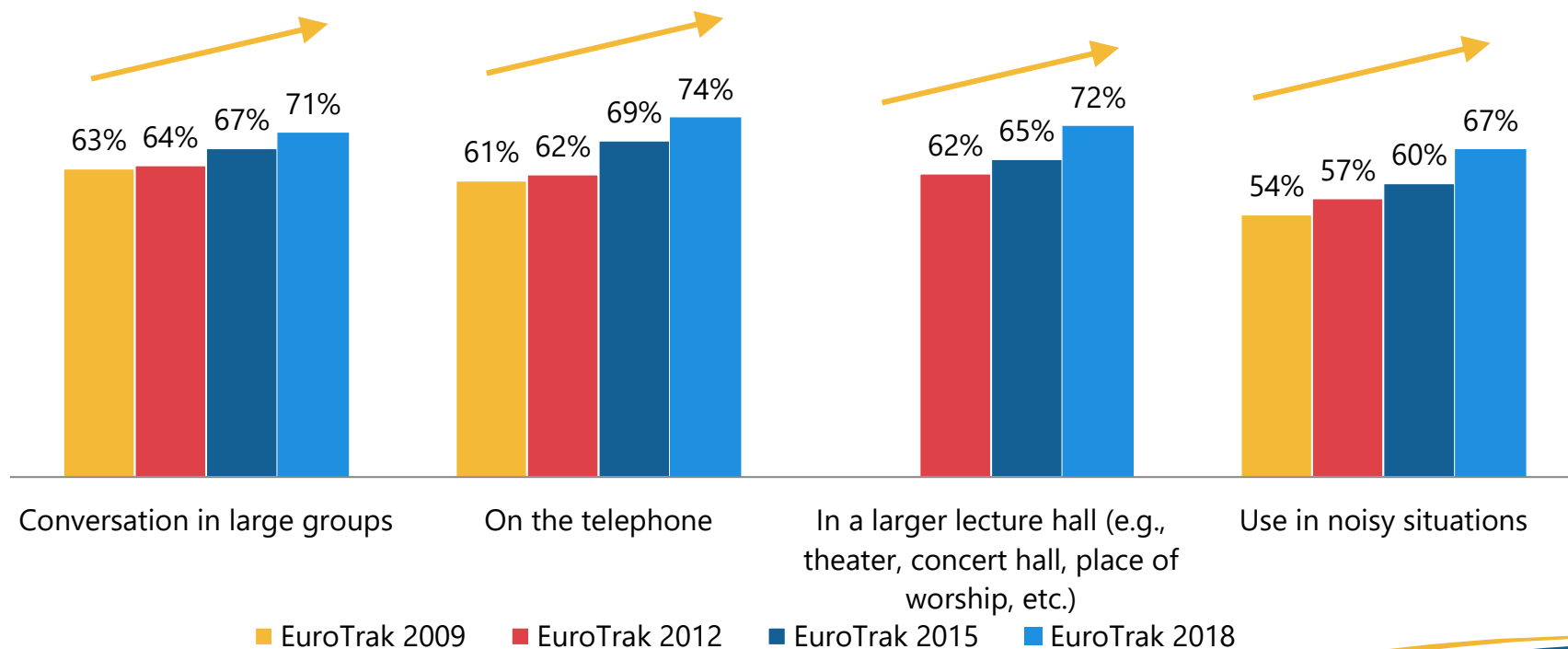
Source: EuroTrak pooled data GER, FRA, UK, **2009, 2012, 2015, 2018** Hearing aid owners

Satisfaction with HA in difficult listening situations is improving



Trends

% satisfied



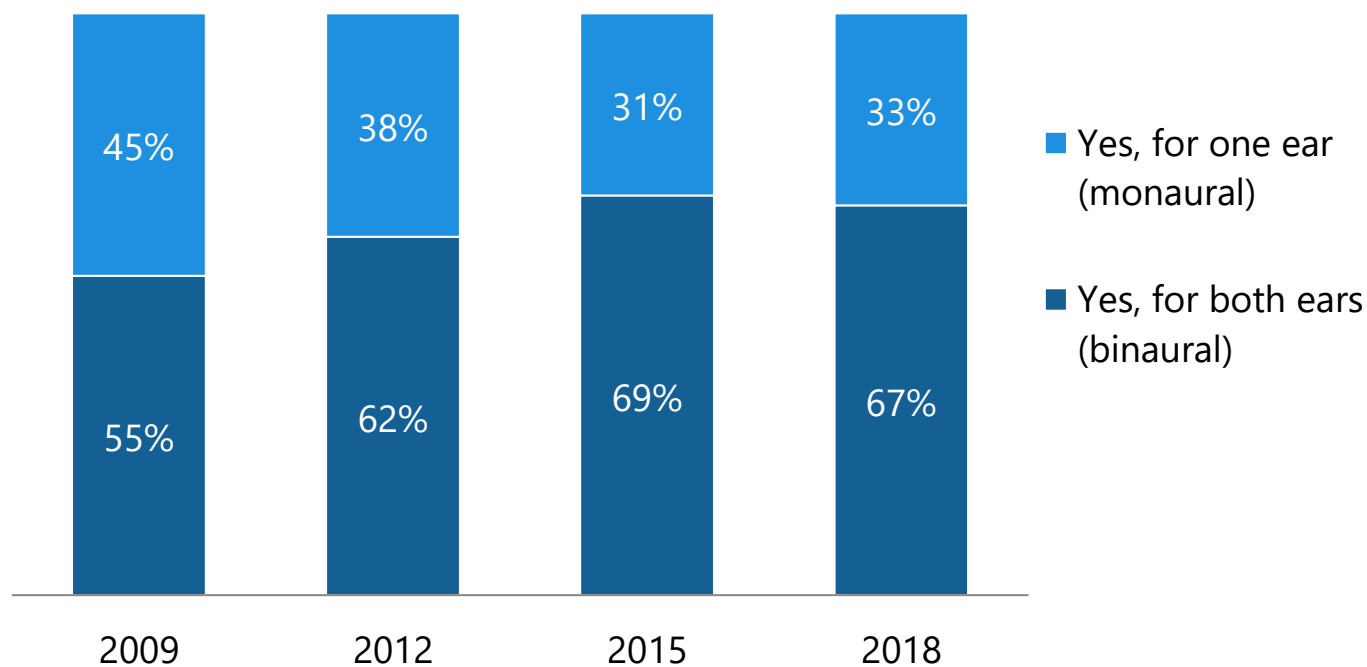
2009 n=1,483, 2012 n=1,488, 2015 n=1,593, 2018 n=1,784

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

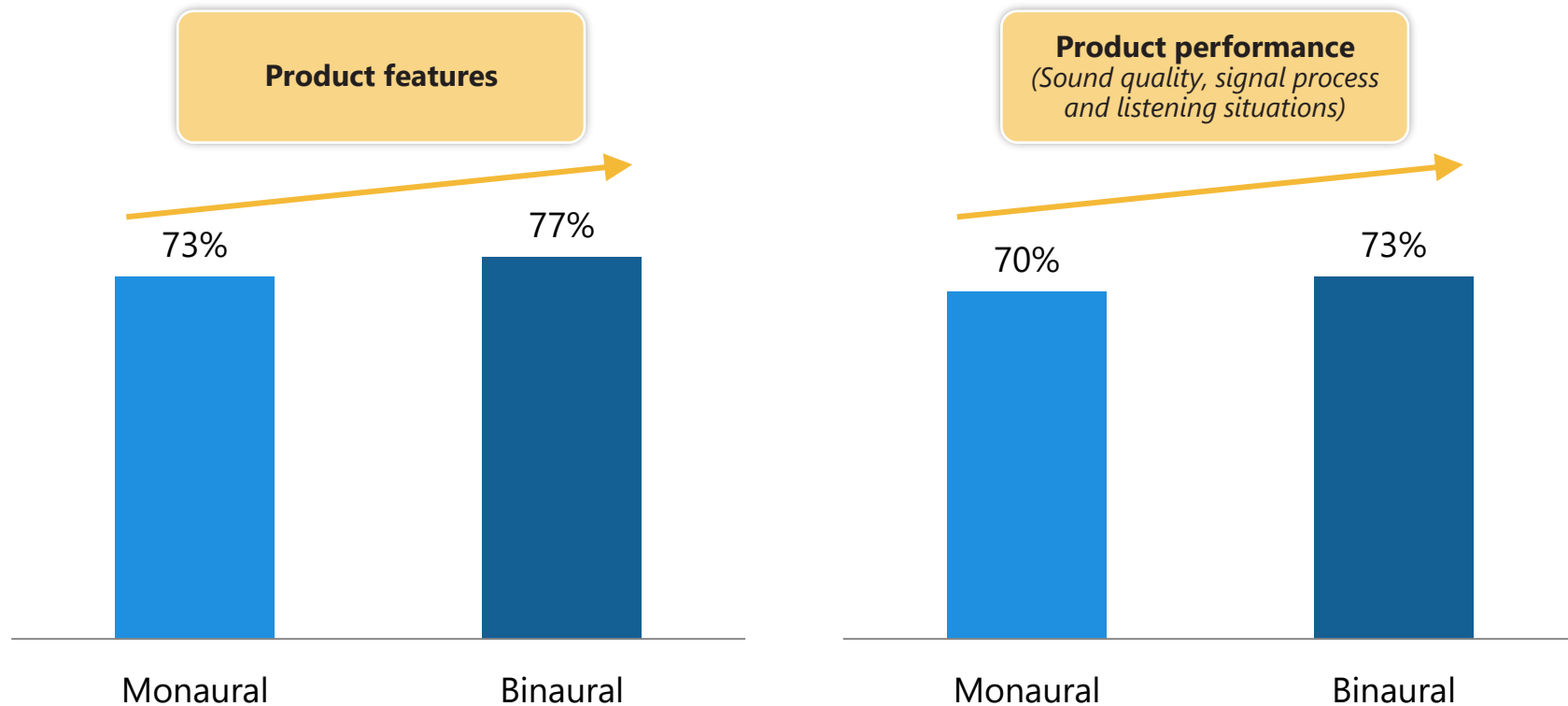
Source: EuroTrak pooled data GER, FRA, UK, 2009, 2012, 2015, 2018 Hearing aid owners

This is good because.....

Binaurally fitted users are more satisfied



% satisfied



Monaural n=2,390

Binaural n=4,025

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

Binaural fitting outperforms monaural fitting for mild to severe degrees of hearing loss



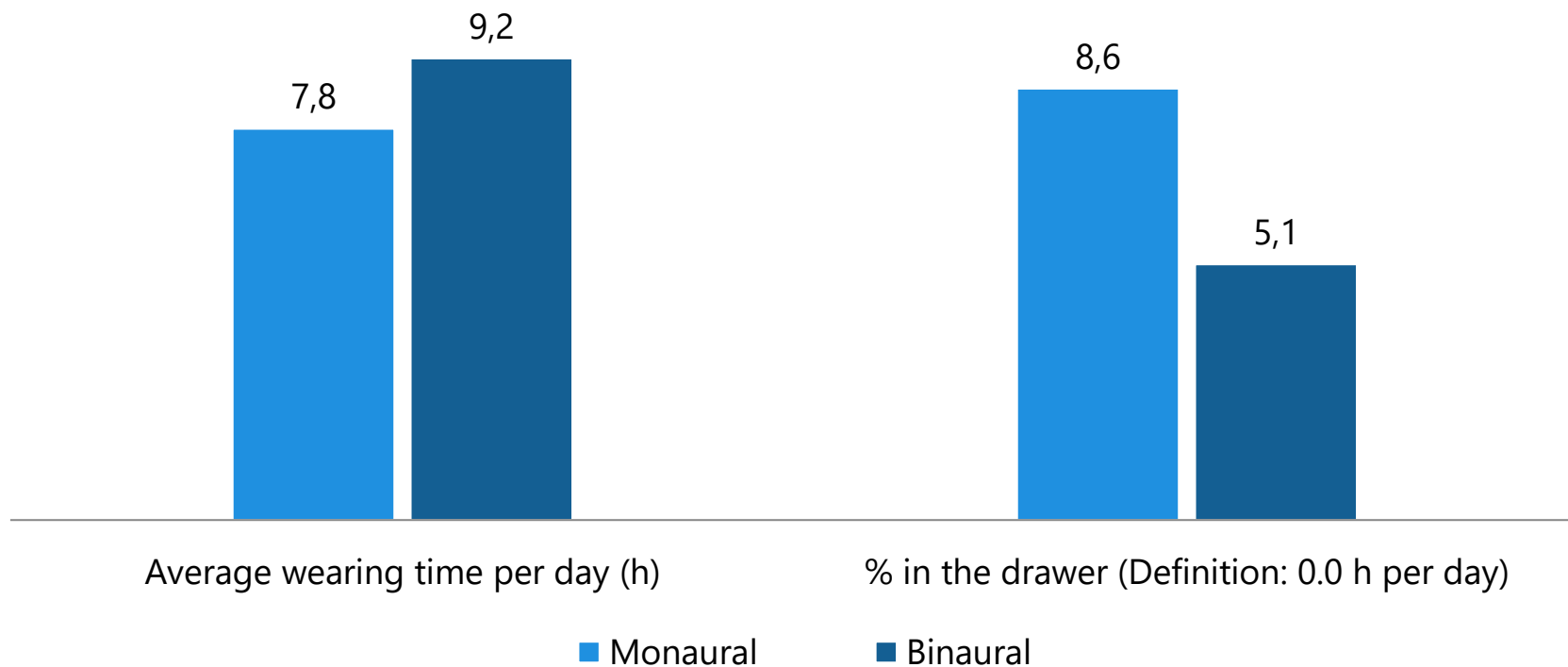
Degree of hearing loss (self stated)	Binaural fitting % satisfied	Monaural fitting % satisfied
Mild	76% n=357	69% n=338
Moderate	82% n=1,985	76% n=1,244
Severe	76% n=1,304	74% n=588
Profound	74% n=319	74% n=180

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

Binaurally fitted use their hearing aids more



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



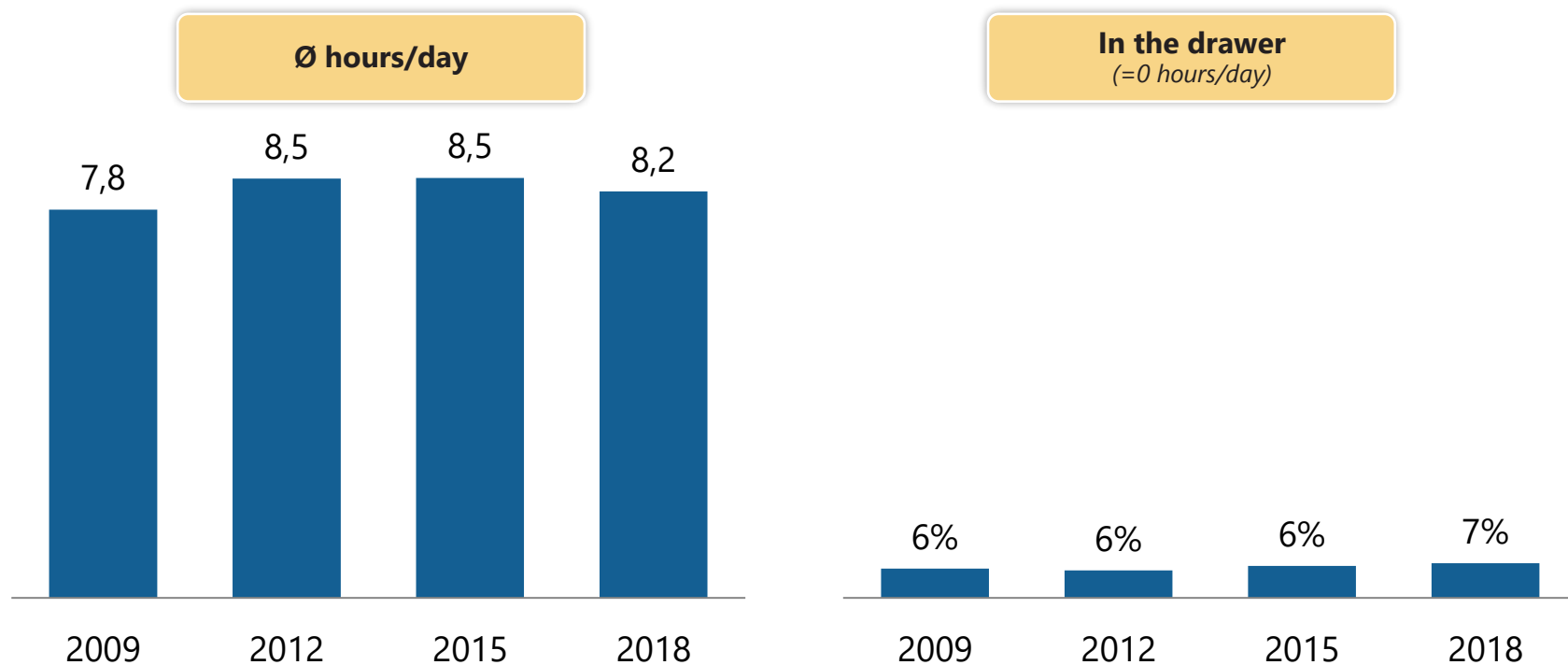
Monaural n=2,390

Binaural n=4,025

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

HA usage per day

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



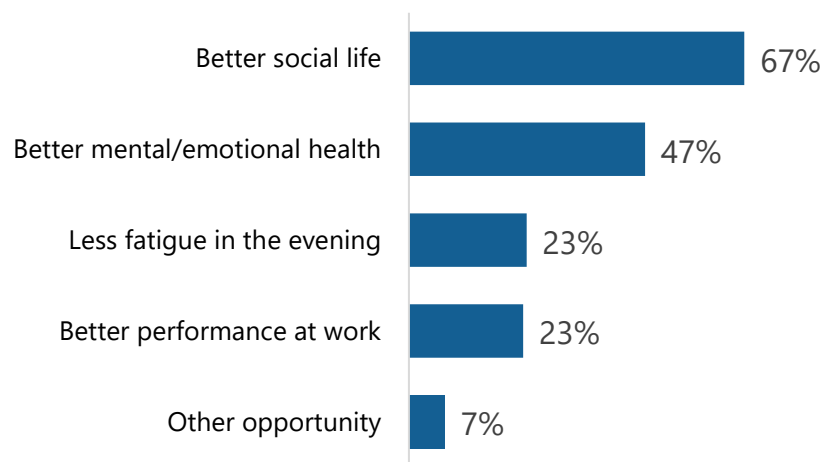
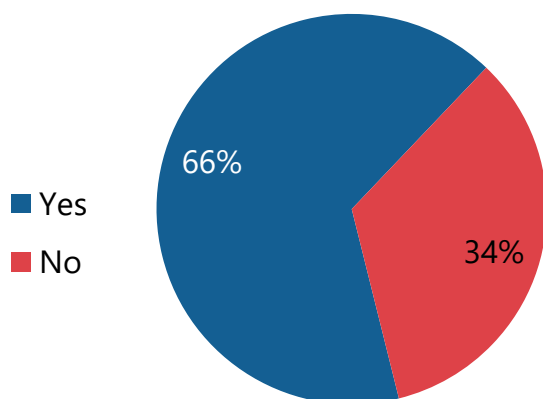
2009 n=1,517, 2012 n=1,503, 2015 n=1,611, 2018 n=1,783

Source: EuroTrak pooled data GER, FRA, UK, **2009, 2012, 2015, 2018** 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 of this?

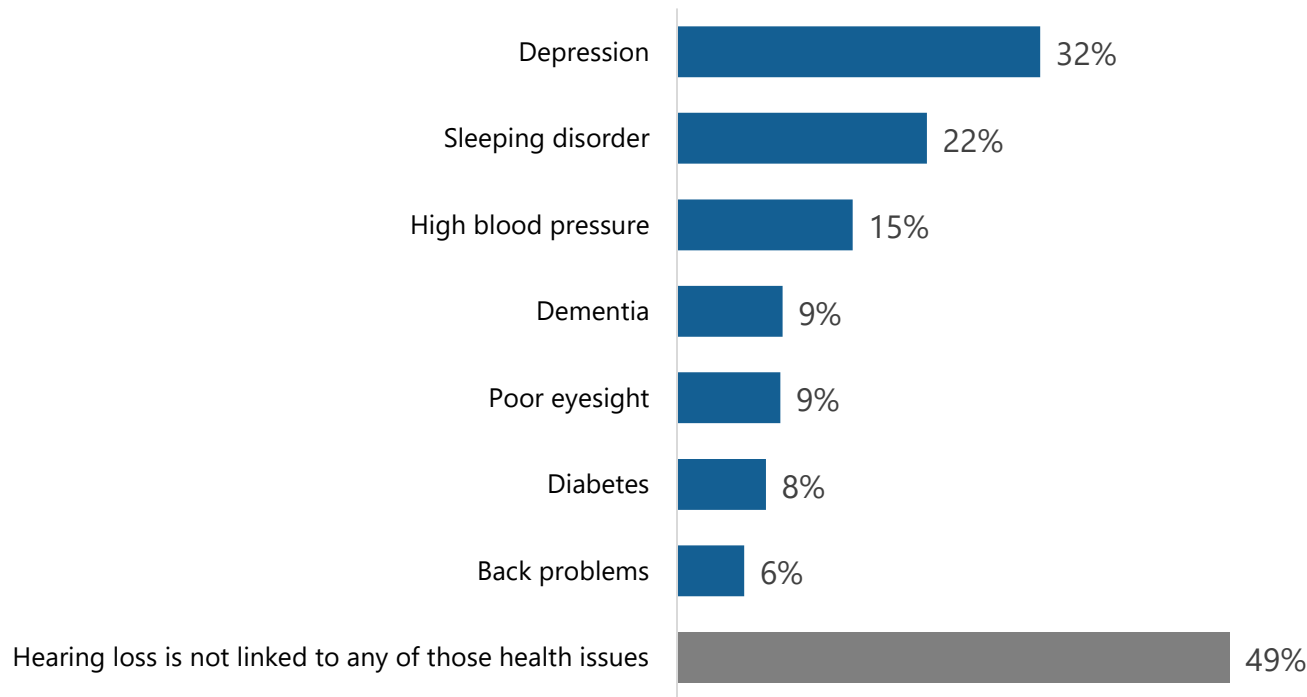


Source: EuroTrak pooled data GER, FRA, UK, 2018: Hearing aid owners
N=1'784 / 1'064

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



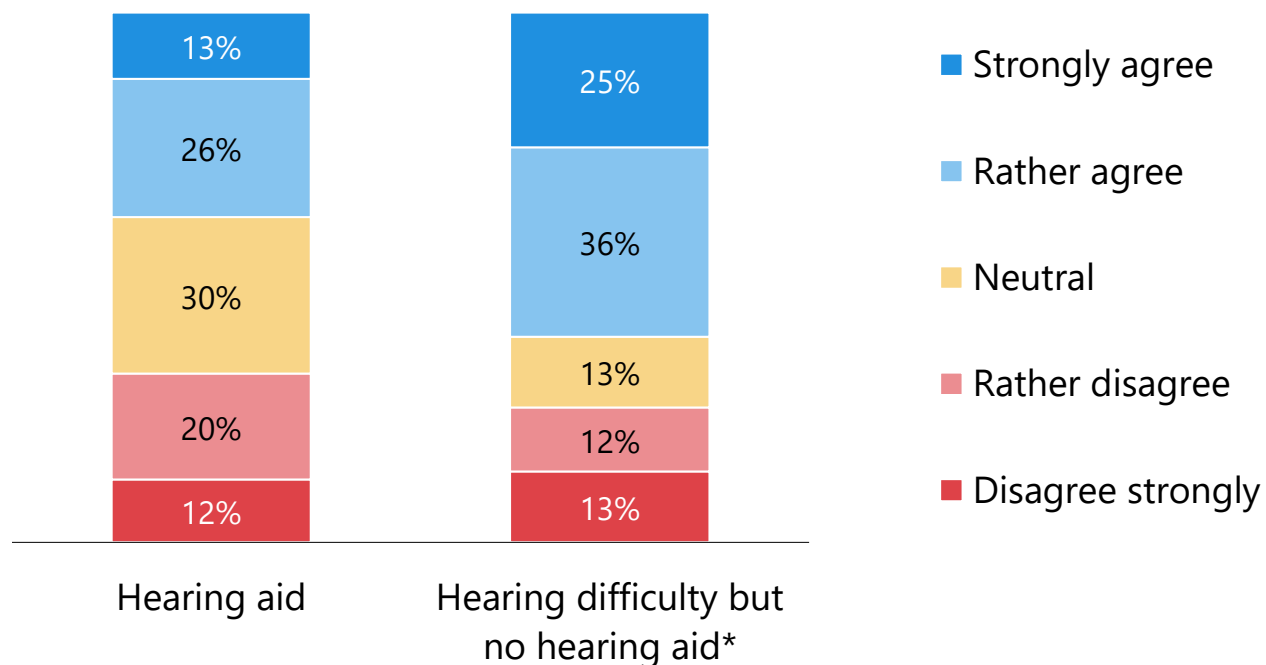
Please tick all of the health issues below which you think could be linked to one's hearing loss



Source: EuroTrak pooled data GER, FRA, UK, 2018: Hearing impaired
N=3'689

Positive impact of HA's on physical stress

In the evenings I often feel physically exhausted

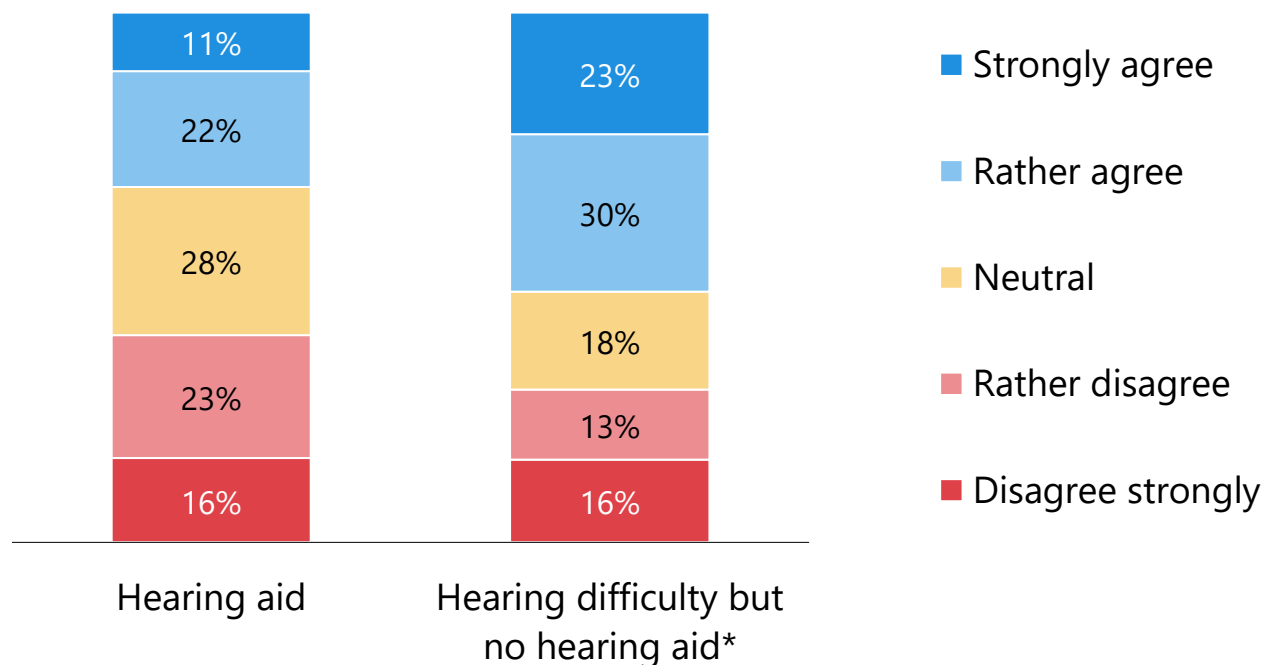


Source: EuroTrak pooled data GER, FRA, UK, 2009, 2012, 2015, 2018

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

Positive impact of HA's on mental stress

In the evenings I often feel mentally exhausted



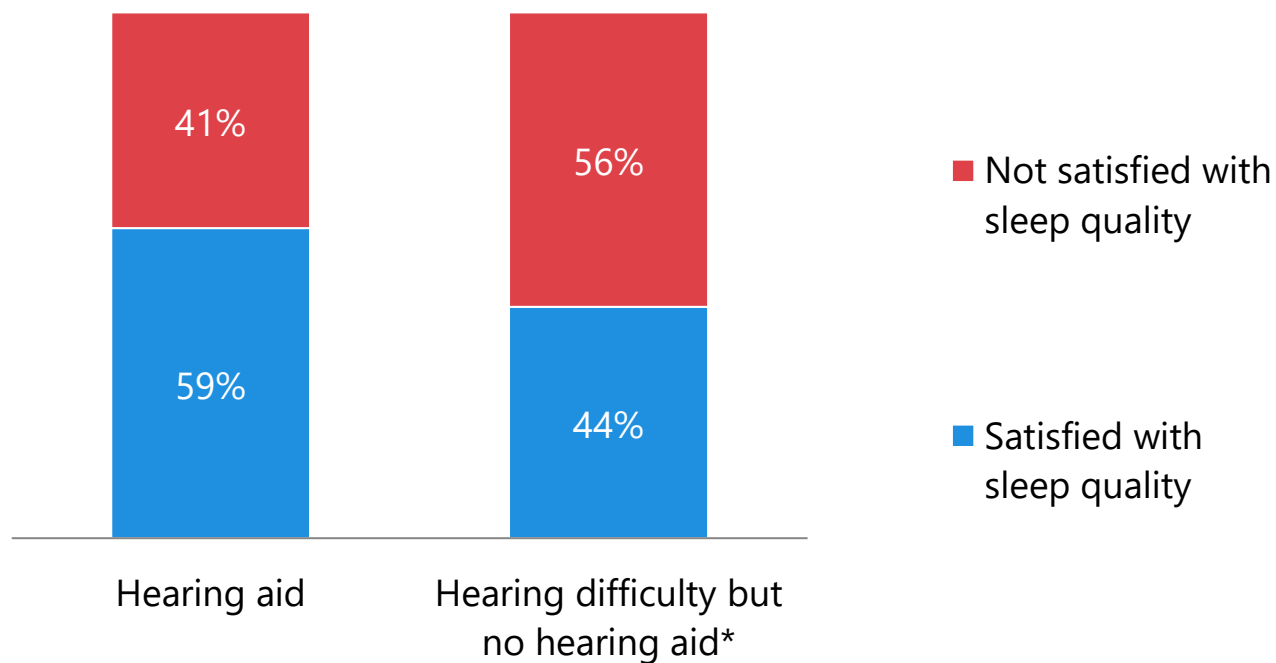
Source: EuroTrak pooled data GER, FRA, UK, 2009, 2012, 2015, 2018

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

People with hearing aids sleep better



Are you generally satisfied with the quality of your sleep?



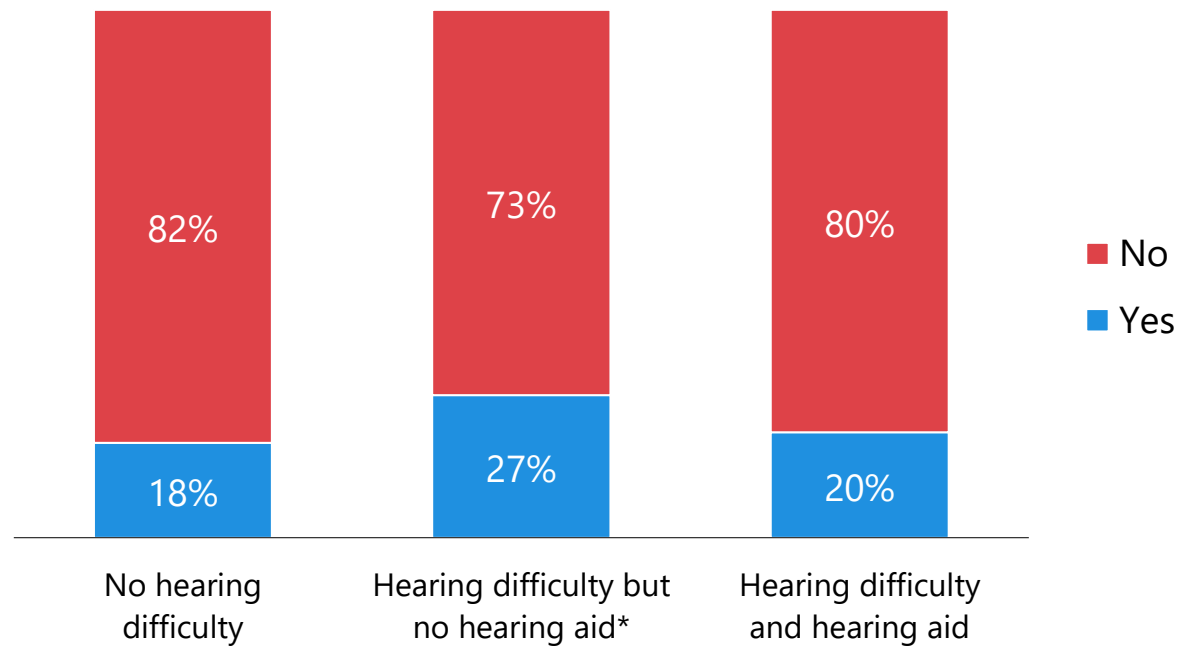
Source: EuroTrak pooled data GER, FRA, UK, 2012, 2015, 2018

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

The positive impact of HA's on depressive symptoms



Depressive symptoms (PHQ-2)



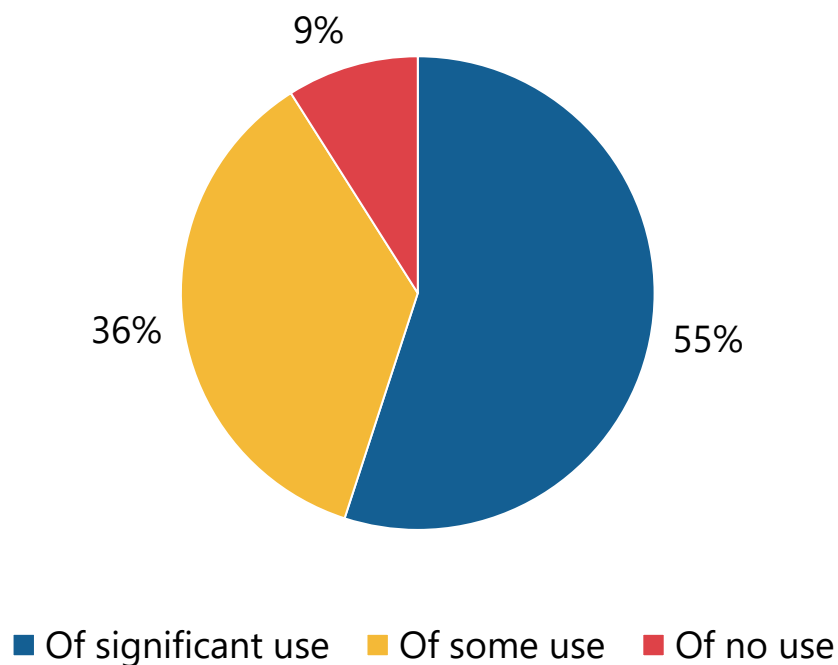
Source: EuroTrak pooled data GER, FRA, UK, 2012, 2015, 2018

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

Labour market

Hearing aids are useful on the job

How useful are your hearing aids on your job?



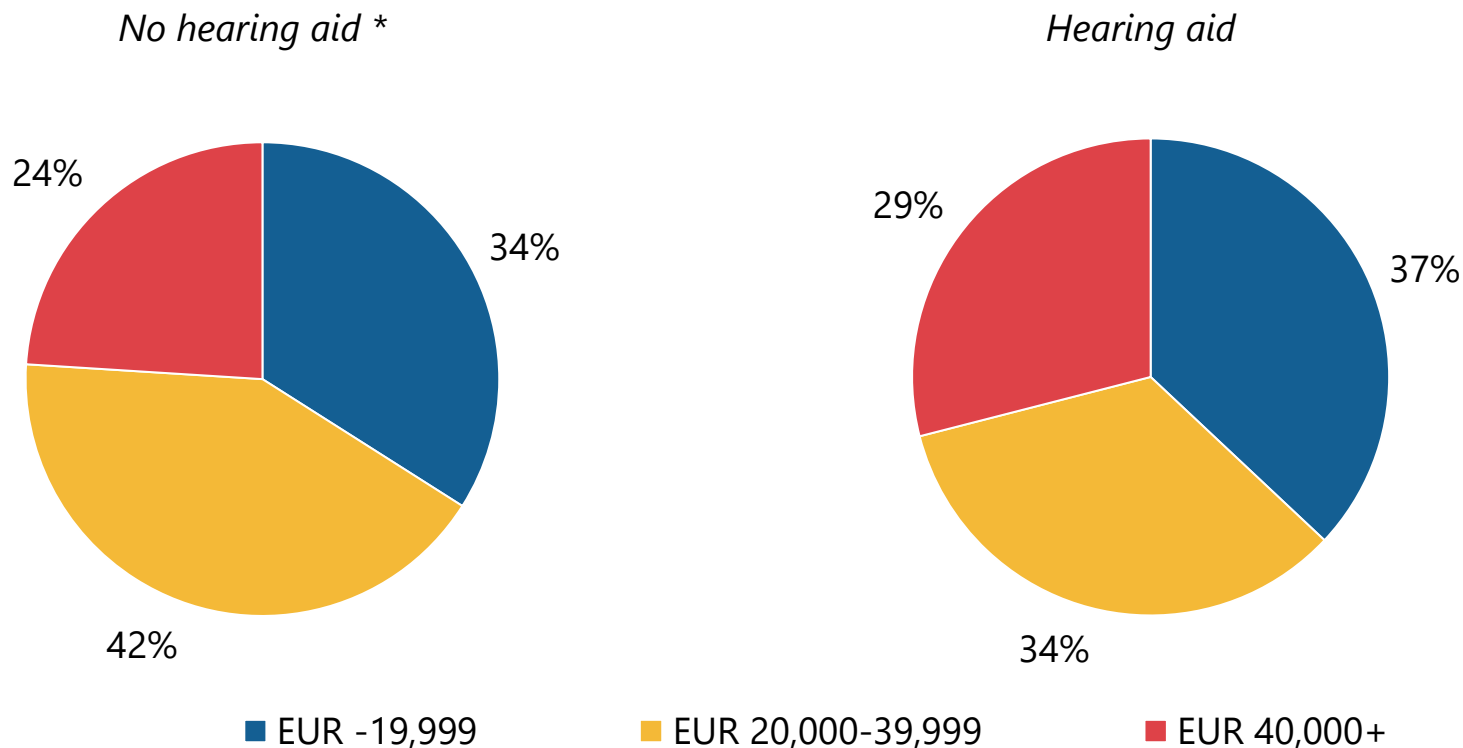
Source: EuroTrak pooled data GER, FRA, UK, 2012, 2015, 2018: Hearing aid owners

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Employed HA users more often earn a higher salary



What is your annual PERSONAL income before tax etc. ?



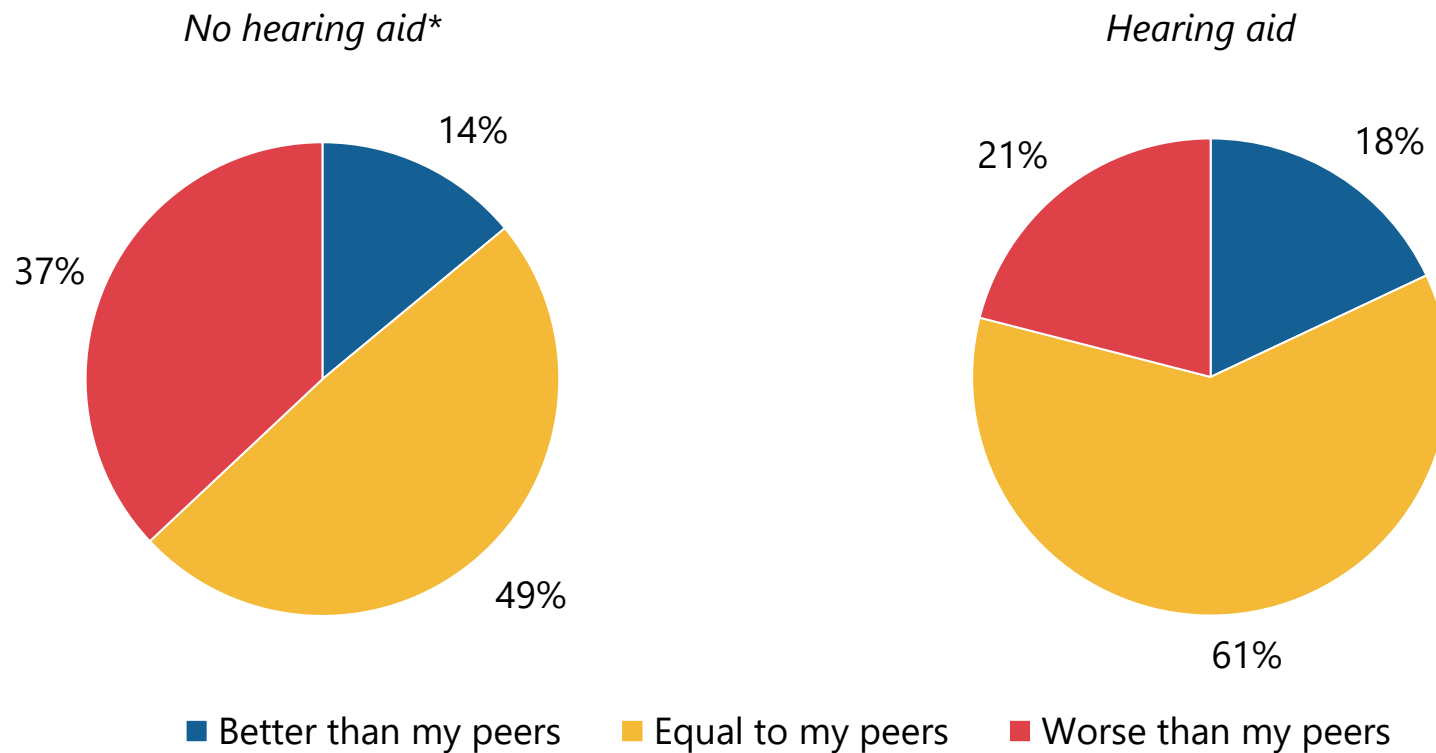
Source: EuroTrak pooled data GER, FRA, UK, 2009, 2012, 2015, 2018

*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?



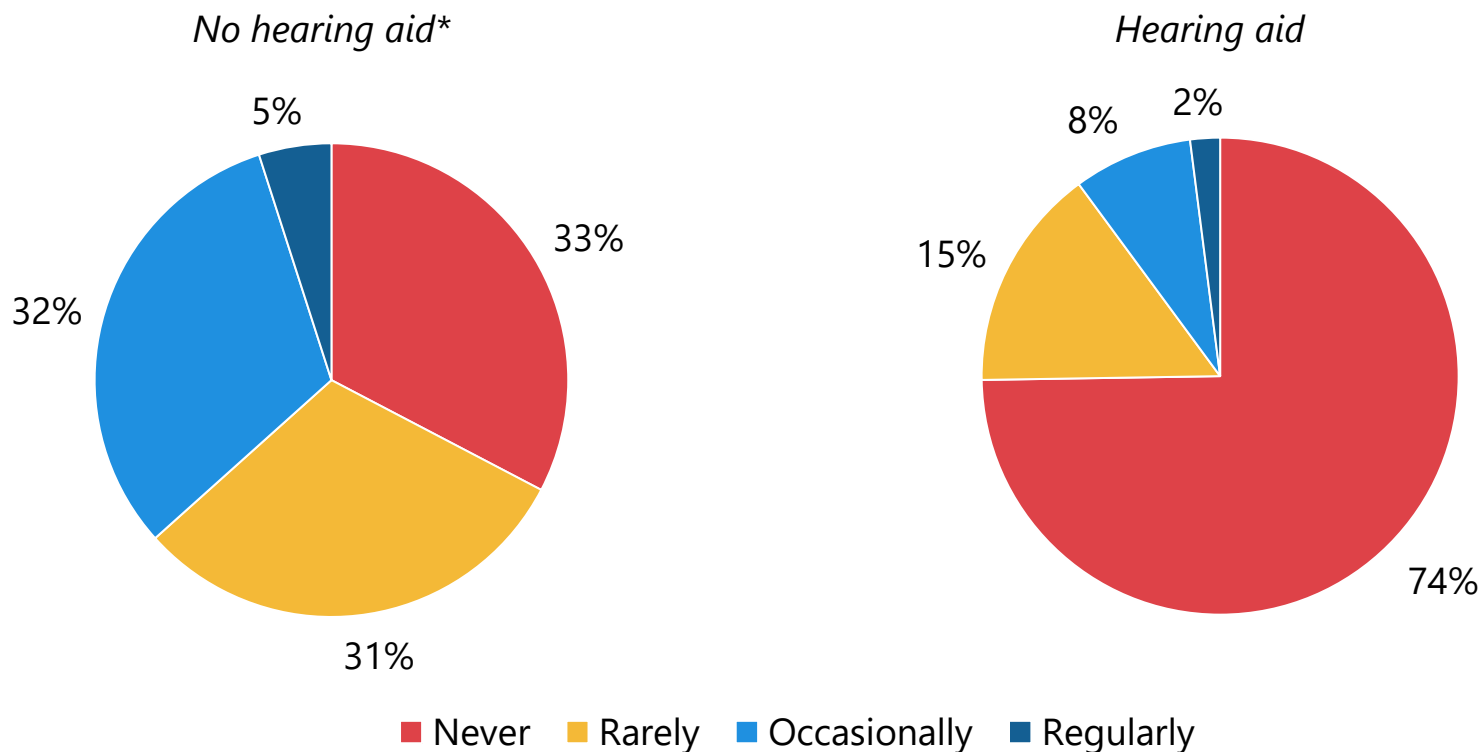
Source: EuroTrak pooled data GER, FRA, UK, 2009, 2012, 2015, 2018

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

87% of all users do not feel they're made fun of. Non-users often feel made fun of (36%)



**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?**



Source: EuroTrak pooled data GER, FRA, UK, 2018

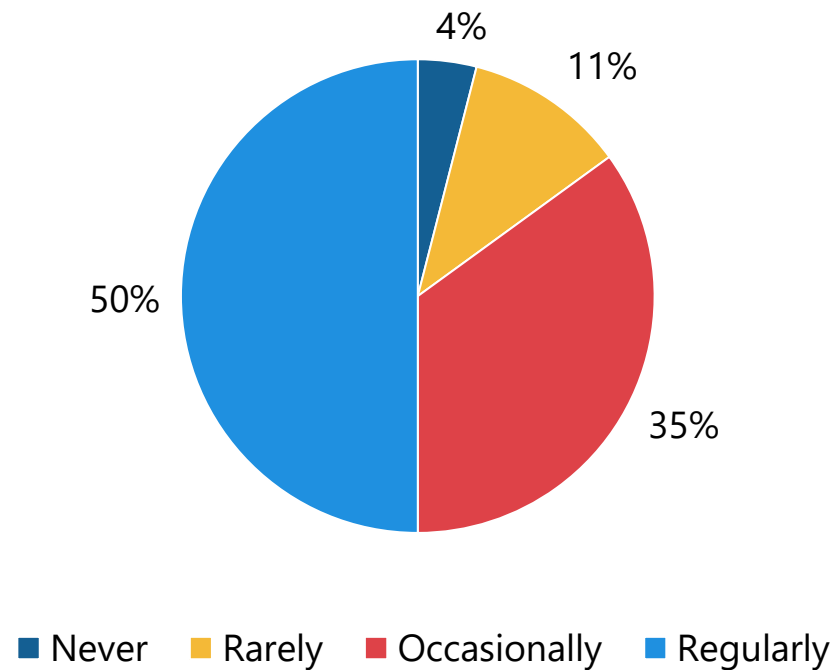
*top 50% HL (similar HL as HA owners)

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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?



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

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Thanks for your attention!