EuroTrak: A Great Source of Information on Hearing Aids and Users

NIKOLAI BISGAARD
VP EXTERNAL RELATIONS

Learning Outcomes

After this course learners will be able to…

• Explain how to retrieve and use data from the EuroTrak repository.
• Relate market development to consumer survey results.
• Describe product features that increase user satisfaction.
Overview

1. Introduction to EuroTrak 0-10 Minutes
2. Structure of EuroTrak surveys 10-25 Minutes
3. Trends exposed by EuroTrak over 9 years 25-55 Minutes
4. Summary 55-60 Minutes
EuroTrak

- **EHIMA** is: *European Hearing Aid Manufacturers Association*
  - GN Hearing, Sivantos, Sonova, Starkey, W. Demant & Widex
- EuroTrak initiated by EHIMA in 2009
- Questionnaire designed to be compatible with U.S. MarkeTrak to secure cross-continent comparisons
- On-line survey method
  - Mail contact to panel members filling in an online survey. 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 in these countries to capture development over time

**Survey Design**

- Questionnaire with around 100 standard questions plus 10 questions on particular topics of local interest
- Carried out by Zurich based research company Anovum

- Main categories:
  - Demographics – age, gender, family size, region, education, employment status, income level
  - Hearing status - "Which of the following (6 in total) conditions apply to you" incl. Hearing difficulty
  - Hearing aid ownership and the journey
  - Benefits of hearing aid use, opinions on hearing aids
  - Quality of life

  - Different questions for users and non-users
Status 2019
Many more countries have done EuroTrak surveys and more are on the way

Pooled data: Total sample sizes

<table>
<thead>
<tr>
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<td>UK</td>
<td>14,980</td>
<td>14,896</td>
<td>14,473</td>
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<td>Germany</td>
<td>14,183</td>
<td>13,922</td>
<td>13,775</td>
<td>13,583</td>
<td>55,463</td>
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<tr>
<td>France</td>
<td>15,545</td>
<td>15,430</td>
<td>14,824</td>
<td>15,061</td>
<td>60,860</td>
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<tr>
<td>Total</td>
<td>44,708</td>
<td>44,248</td>
<td>43,072</td>
<td>43,499</td>
<td>175,527</td>
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Pooled data: Hearing impaired sample sizes

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<tbody>
<tr>
<td>HA owners</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>513</td>
<td>501</td>
<td>605</td>
<td>698</td>
<td>2,317</td>
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<tr>
<td>Germany</td>
<td>503</td>
<td>500</td>
<td>505</td>
<td>536</td>
<td>2,044</td>
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<td>France</td>
<td>501</td>
<td>502</td>
<td>501</td>
<td>550</td>
<td>2,054</td>
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<td></td>
<td><strong>Total</strong></td>
<td><strong>1,517</strong></td>
<td><strong>1,503</strong></td>
<td><strong>1,611</strong></td>
<td><strong>6,415</strong></td>
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<tr>
<td>Impaired non-owners</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>UK</td>
<td>822</td>
<td>795</td>
<td>720</td>
<td>602</td>
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<td>Germany</td>
<td>805</td>
<td>864</td>
<td>799</td>
<td>766</td>
<td>3,234</td>
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<tr>
<td>France</td>
<td>803</td>
<td>809</td>
<td>819</td>
<td>761</td>
<td>3,192</td>
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<tr>
<td></td>
<td><strong>Total</strong></td>
<td><strong>2,430</strong></td>
<td><strong>2,468</strong></td>
<td><strong>2,338</strong></td>
<td><strong>9,365</strong></td>
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<tr>
<td>All impaired</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Total</td>
<td>3,947</td>
<td>3,971</td>
<td>3,949</td>
<td>3,913</td>
<td>15,780</td>
</tr>
</tbody>
</table>

Overview

1. Introduction to EuroTrak 0-10 Minutes
2. Structure of EuroTrak surveys 10-25 Minutes
3. Trends exposed by EuroTrak over 9 years 25-55 Minutes
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EuroTrak Survey Structure

- The Eurotrak surveys are publicly accessible at the EHIMA web site: www.Ehima.org
- Check the tab named SURVEYS

How to find them

Surveys

EuroTrak is the largest comparative multi-country study on hearing loss and hearing aid usage.

Initiated by EHIMA in 2004, EuroTrak was designed as a means of raising public awareness on key issues of hearing loss and hearing care. It sheds light on hearing loss prevalence as well as on the use of hearing aids and the experience of hard of hearing people with their hearing instruments. Initially conducted in Germany, France and United Kingdom, EuroTrak today covers a wide range of countries across Europe and beyond. Repeating a national survey every three years allows to identify trends across time and borders.

EuroTrak is designed as an online panel study, based on self-reported hearing loss of the participants. It is carried out by the market research institute ANOSUS on behalf of EHIMA. This questionnaire is designed to be compatible with U.S. MarketTrak to secure cross continent comparability.

EuroTrak Country Market Surveys:
- EuroTrak France 2007
- EuroTrac France 2008
- EuroTrak France 2009
- EuroTrak France 2010
- EuroTrak Germany 2006
- EuroTrak Belgium 2007
- EuroTrak The Netherlands 2016
- EuroTrak Poland 2015
- EuroTrak Denmark 2014
- EuroTrak United Kingdom 2015
- EuroTrak France 2015
- EuroTrak Switzerland 2015
- EuroTrak Italy 2015
- EuroTrak Spain 2015
- EuroTrak Denmark 2016
- EuroTrak Italy 2016
- EuroTrak Germany 2012
- EuroTrak United Kingdom 2012
- EuroTrak France 2013
- EuroTrak Norway 2012
- EuroTrak Italy 2012
- EuroTrak Switzerland 2012
- EuroTrak United Kingdom 2012
- EuroTrak Germany 2012
- EuroTrak Australia 2012
- EuroTrak Denmark 2013
- EuroTrak United Kingdom 2009
- EuroTrak Germany 2009

EuroTrak Presentations
Results

EuroTrak France 2018

1. Introduction
   - Organisation of EuroTrak 2018
   - Recruitment process: In search of hearing impaired people
2. Market overview
   - Prevalence of hearing loss and hearing aid adoption rate
   - Hearing tests and where hearing is tested
   - The route to the hearing aid: Sources of information and drop-out rates
   - Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive symptoms, sleep quality, co-morbidities
3. Analysis of hearing aid owners
   - Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
   - Reasons for getting hearing aids sooner
   - Channels for getting hearing aids, recommendation of channel (NPS)
   - Awareness and usage of accessories
   - Satisfaction with hearing aids and drivers
   - Importance of listening situations
   - Positive impact of hearing aids, safety due to hearing aids, quality of life
4. Analysis of hearing impaired non-owners
   - Reasons for not having hearing aids
   - Social rejection because of hearing loss compared to the acceptance of hearing aids
   - Most important triggers to buy
5. Appendix
   - Demographics: Hearing instrument adoption rates and populations

New topics for EuroTrak 2018 are highlighted in red
Hearing loss and hearing instrument ownership by gender/age

Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*

Low 50% hearing loss*

* Construction of groups: A factor analysis was performed to identify one factor “degree of hearing loss”. The following questions were included in the factor:
  + Number of years since started (used to test)
  + Degree of hearing loss (used to test)
  + Degree of disability (used to test)
  + Whether using a hearing aid (used to test)
Recommendations by profession

On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 6 years before they are being replaced.

Current HAs = first HAs?

2015: 64%

Yes: 72%

No: 28%

How many years did you own your previous HAs?

13% 42% 25% 20%

1-3 years 4-6 years 7-10 years 11 years or longer

Base: n=122

Age of HA before it has been replaced:

2006: 6 years (median)

2015: 6 years (median)

Thinking back before you purchased your first hearing aid: How many years have passed since you became aware of your hearing loss until you purchased a hearing aid?

15% 23% 25% 21% 16%

1 year 2 years 3 years 4-6 years more than 6 years

Base: n=387
Overview

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Hearing loss prevalence remains stable

% hearing loss prevalence

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Total 18+</th>
<th>&lt;=14</th>
<th>15-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65-74</th>
<th>74+</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>12.1%</td>
<td>11.4%</td>
<td>10.7%</td>
<td>10.0%</td>
<td>9.2%</td>
<td>8.5%</td>
<td>7.6%</td>
<td>6.1%</td>
<td>5.6%</td>
<td>4.8%</td>
<td>4.6%</td>
</tr>
<tr>
<td>Female</td>
<td>13.2%</td>
<td>12.5%</td>
<td>11.8%</td>
<td>11.1%</td>
<td>10.3%</td>
<td>9.6%</td>
<td>8.6%</td>
<td>7.0%</td>
<td>6.5%</td>
<td>5.6%</td>
<td>5.5%</td>
</tr>
</tbody>
</table>

EuroTrak 2009
Base: 44,708

EuroTrak 2012
Base: 44,248

EuroTrak 2015
Base: 43,072

EuroTrak 2018
Base: 43,499

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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

<table>
<thead>
<tr>
<th>Degree of hearing loss</th>
<th>Sample size</th>
<th>% Female</th>
<th>Age (median)</th>
</tr>
</thead>
<tbody>
<tr>
<td>low</td>
<td>2,337</td>
<td>40%</td>
<td>53 years</td>
</tr>
<tr>
<td>high</td>
<td>2,178</td>
<td>56%</td>
<td>73 years</td>
</tr>
</tbody>
</table>

Hearing aid satisfaction & usage
Positive impacts
Perceived product performance is key driver for satisfaction

Satisfaction

- Professionalism of dispenser
- Quality of dispenser’s counselling
- Quality of service during hearing aid fitting period
- Quality of service after purchase

- Battery life
- Value (performance versus money spent)
- Managing whistling/feedback/buzzing
- Ease of changing battery
- Overall fit/ Comfort
- Visibility to others
- Reliability

- Conversation in large groups
- Conversation in small groups
- Use in noisy situations
- Richness or fidelity of sound
- Clarity of tone and sound
- Natural sounding
- Leisure activities
- Watching TV
- Comfort with loud sounds
- On the telephone
- Conversation with one Person

Factors identified by factor analysis

- Dispenser
- Product features

Factors identified by factor analysis

- Overall satisfaction

Betas from regression analysis

- Dispenser
- Product features

Rsq = 0.62

Image of hearing aids is improving

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

- Embarrassed to wear a hearing aid
- Bad design

Embarrassed to wear a hearing aid
Bad design

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

56% 52% 42% 30%
2009 2012 2015 2018

53% 48% 35% 24%
2009 2012 2015 2018

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GN Making Life Sound Better FOR 150 YEARS
Satisfaction with HA features and performance increased

**Trends**

<table>
<thead>
<tr>
<th>Year</th>
<th>Product features</th>
<th>Product performance (Sound quality, signal process and listening situations)</th>
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<tbody>
<tr>
<td>2009</td>
<td>70%</td>
<td>69%</td>
</tr>
<tr>
<td>2012</td>
<td>76%</td>
<td>71%</td>
</tr>
<tr>
<td>2015</td>
<td>77%</td>
<td>73%</td>
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<tr>
<td>2018</td>
<td>80%</td>
<td>76%</td>
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2009 n=1,483, 2012 n=1,488, 2015 n=1,593, 2018 n=1,784

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Satisfaction with HA in difficult listening situations is improving

**Trends**

<table>
<thead>
<tr>
<th>Scenario</th>
<th>2009</th>
<th>2012</th>
<th>2015</th>
<th>2018</th>
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</thead>
<tbody>
<tr>
<td>Conversation in large groups</td>
<td>63%</td>
<td>64%</td>
<td>67%</td>
<td>71%</td>
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<tr>
<td>On the telephone</td>
<td>61%</td>
<td>62%</td>
<td>69%</td>
<td>74%</td>
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<tr>
<td>In a larger lecture hall (e.g., theater, concert hall, place of worship, etc.)</td>
<td>62%</td>
<td>65%</td>
<td>72%</td>
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<tr>
<td>Use in noisy situations</td>
<td>54%</td>
<td>57%</td>
<td>60%</td>
<td>67%</td>
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</table>

2009 n=1,483, 2012 n=1,488, 2015 n=1,593, 2018 n=1,784
Binaural fitting rate increased from 2009 to 2015

Do you own or use a hearing aid?

<table>
<thead>
<tr>
<th>Year</th>
<th>Yes, for one ear (monaural)</th>
<th>Yes, for both ears (binaural)</th>
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</thead>
<tbody>
<tr>
<td>2009</td>
<td>45%</td>
<td>55%</td>
</tr>
<tr>
<td>2012</td>
<td>38%</td>
<td>62%</td>
</tr>
<tr>
<td>2015</td>
<td>31%</td>
<td>69%</td>
</tr>
<tr>
<td>2018</td>
<td>33%</td>
<td>67%</td>
</tr>
</tbody>
</table>

This is good because.....

Binaurally fitted users are more satisfied

- Product features:
  - Monaural: 73%
  - Binaural: 77%

- Product performance (Sound quality, signal process and listening situations):
  - Monaural: 70%
  - Binaural: 73%

Monaural n=2,390
Binaural n=4,025
Binaural fitting outperforms monaural fitting for mild to severe degrees of hearing loss

<table>
<thead>
<tr>
<th>Degree of hearing loss (self stated)</th>
<th>Binaural fitting % satisfied</th>
<th>Monaural fitting % satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mild</td>
<td>76% n=357</td>
<td>69% n=338</td>
</tr>
<tr>
<td>Moderate</td>
<td>82% n=1,985</td>
<td>76% n=1,244</td>
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<tr>
<td>Severe</td>
<td>76% n=1,304</td>
<td>74% n=588</td>
</tr>
<tr>
<td>Profound</td>
<td>74% n=319</td>
<td>74% n=180</td>
</tr>
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</table>


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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  
HA usage per day

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

<table>
<thead>
<tr>
<th>Year</th>
<th>HA usage per day</th>
<th>In the drawer (=0 hours/day)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>7.8</td>
<td>6%</td>
</tr>
<tr>
<td>2012</td>
<td>8.5</td>
<td>6%</td>
</tr>
<tr>
<td>2015</td>
<td>8.5</td>
<td>6%</td>
</tr>
<tr>
<td>2018</td>
<td>8.2</td>
<td>7%</td>
</tr>
</tbody>
</table>


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?

- Yes 66%
- No 34%

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

- Depression: 32%
- Sleeping disorder: 22%
- High blood pressure: 15%
- Dementia: 9%
- Poor eyesight: 9%
- Diabetes: 8%
- Back problems: 6%

Hearing loss is not linked to any of those health issues: 49%

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

<table>
<thead>
<tr>
<th></th>
<th>Hearing aid</th>
<th>Hearing difficulty but no hearing aid*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly agree</td>
<td>13%</td>
<td>25%</td>
</tr>
<tr>
<td>Rather agree</td>
<td>26%</td>
<td>36%</td>
</tr>
<tr>
<td>Neutral</td>
<td>30%</td>
<td>13%</td>
</tr>
<tr>
<td>Rather disagree</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>Disagree strongly</td>
<td>12%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Source: EuroTrak pooled data GER, FRA, UK, 2009, 2012, 2015, 2018
*top 50% HL (similar HL as HA owner)

© anovum
Positive impact of HA's on mental stress

In the evenings I often feel mentally exhausted

<table>
<thead>
<tr>
<th>Hearing aid</th>
<th>Hearing difficulty but no hearing aid*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly agree</td>
<td></td>
</tr>
<tr>
<td>Rather agree</td>
<td></td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
</tr>
<tr>
<td>Rather disagree</td>
<td></td>
</tr>
<tr>
<td>Disagree strongly</td>
<td></td>
</tr>
</tbody>
</table>

11% 22% 28% 23% 16%
23% 30% 18% 13% 16%

Source: EuroTrak pooled data GER, FRA, UK, 2009, 2012, 2015, 2018
*top 50% HL (similar HL to HA owners)
© anovum

People with hearing aids sleep better

Are you generally satisfied with the quality of your sleep?

<table>
<thead>
<tr>
<th>Hearing aid</th>
<th>Hearing difficulty but no hearing aid*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not satisfied with sleep quality</td>
<td></td>
</tr>
<tr>
<td>Satisfied with sleep quality</td>
<td></td>
</tr>
</tbody>
</table>

41% 59%
56% 44%

Source: EuroTrak pooled data GER, FRA, UK, 2012, 2015, 2018
*top 50% HL (similar HL to HA owners)
© anovum

© anovum
The positive impact of HA’s on depressive symptoms

Depressive symptoms (PHQ-2)

<table>
<thead>
<tr>
<th></th>
<th>No hearing difficulty</th>
<th>Hearing difficulty but no hearing aid*</th>
<th>Hearing difficulty and hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>18%</td>
<td>27%</td>
<td>20%</td>
</tr>
<tr>
<td>Yes</td>
<td>82%</td>
<td>73%</td>
<td>80%</td>
</tr>
</tbody>
</table>

Source: EuroTrak pooled data GER, FRA, UK, 2012, 2015, 2018
*top 50% HL (similar HL as HA owners)

© anovum
Hearing aids are useful on the job

How useful are your hearing aids on your job?

- Of significant use
- Of some use
- Of no use

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

Employed HA users more often earn a higher salary

What is your annual PERSONAL income before tax etc.? 

<table>
<thead>
<tr>
<th>Income Range</th>
<th>No hearing aid *</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>EUR -19,999</td>
<td>42%</td>
<td>34%</td>
</tr>
<tr>
<td>EUR 20,000-39,999</td>
<td>34%</td>
<td>29%</td>
</tr>
<tr>
<td>EUR 40,000+</td>
<td>24%</td>
<td>37%</td>
</tr>
</tbody>
</table>

Source: EuroTrak pooled data GER, FRA, UK, 2009, 2012, 2015, 2018
*top 50% HL (similar HL as HA owners)

© anovum
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?

<table>
<thead>
<tr>
<th>No hearing aid*</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Better than my peers</td>
<td>14%</td>
</tr>
<tr>
<td>Equal to my peers</td>
<td>37%</td>
</tr>
<tr>
<td>Worse than my peers</td>
<td>50%</td>
</tr>
<tr>
<td>Better than my peers</td>
<td>21%</td>
</tr>
<tr>
<td>Equal to my peers</td>
<td>18%</td>
</tr>
<tr>
<td>Worse than my peers</td>
<td>61%</td>
</tr>
</tbody>
</table>

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?

<table>
<thead>
<tr>
<th>No hearing aid*</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Never</td>
<td>5%</td>
</tr>
<tr>
<td>Rarely</td>
<td>32%</td>
</tr>
<tr>
<td>Occasionally</td>
<td>31%</td>
</tr>
<tr>
<td>Regularly</td>
<td>12%</td>
</tr>
<tr>
<td>Never</td>
<td>8%</td>
</tr>
<tr>
<td>Rarely</td>
<td>15%</td>
</tr>
<tr>
<td>Occasionally</td>
<td>74%</td>
</tr>
</tbody>
</table>

Source: EuroTrak pooled data GER, FRA, UK, 2018
*top 50% HL (similar HL as HA owners)
Vast majority declare that their hearing aids improve their quality of life

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

- 4% Never
- 11% Rarely
- 35% Occasionally
- 50% Regularly

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

Summary

- EuroTrak is an on-line survey issued so far in 14 countries. Happens every three years in UK, Germany & France
- A survey can have questions on special topics for each country, but there is a steady base as well.
- Each survey report is about 70 pages and has info on both users and non-users
- The results are available to anyone on the EHIMA website: www.EHIMA.org

Trends over 9 years are:

- Prevalence of self reported hearing loss (SRHL) is stable. Around 11%.
- Hearing aid adoption rates are growing >40%.
- The image of hearing aids is improving.
- Bilateral fitting has grown considerably, but is now at a plateau at 70%.
- Bilaterally fitted users are more satisfied and use devices more hours.
- Hearing aids reduce exhaustion.
- Hearing aid users report fewer depression symptoms.
- Hearing aid users find that their devices help at work.
- Hearing aids generally increase quality of life.
Thanks for your attention!

A previous study on the years 2009-2015 has been published in:
American Journal of Audiology • Vol. 26 • 451–461 • October 2017