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2024 Industry Roundtable

Moderated by Susan Scollie, PhD



Susan Scollie, PhD
Moderator



Jessica Lovell, VP
CareCredit



Brian Taylor, AuD
Signia



Steve DeMari, MS
CaptionCall



Jessica Dancis, MA
Sennheiser



Dave Fabry, PhD
Starkey



Hear better. Live better.



Laurel Christensen, PhD
ReSound



Dana Helmink, AuD
Widex



Natasha McDougald
Cochlear



- **Presenter Disclosure:** Financial: Susan Scollie is a Professor in the School of Communication Sciences and Disorders and the Director of the National Centre for Audiology at Western University, in the Faculty of Health Sciences. She received an honorarium for moderating this course. Non-financial: Susan Scollie has no relevant non-financial relationships to disclose. Financial: Brian Taylor is an employee of Signia, a division of WS Audiology. Non-financial: Brian Taylor has no relevant non-financial relationships to disclose. Financial: Natasha McDougald is an employee of Cochlear Americas. Non-financial: Natasha McDougald has no relevant non-financial relationships to disclose. Financial: Dana Helmink is an employee of Widex. Non-financial: Dana Helmink has no relevant non-financial relationships to disclose. Financial: Dave Fabry is an employee of Starkey. Non-financial: Dave Fabry has no relevant non-financial relationships to disclose. Financial: Jessica Dancis is an employee of Sennheiser. Non-financial: Jessica Dancis has no relevant non-financial relationships to disclose. Financial: Jessica Lovell is an employee of CareCredit. Non-financial: Jessica Lovell has no relevant non-financial relationships to disclose. Financial: Laurel Christensen is an employee and shareholder in GN Store Nord. Non-financial: Laurel Christensen has no relevant non-financial relationships to disclose. Financial: Steve DeMari is an employee of CaptionCall. Non-financial: Steve DeMari has no relevant non-financial relationships to disclose.
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Susan Scollie, PhD

Dr. Scollie is a Professor in the School of Communication Sciences and Disorders, and the Director of the National Centre for Audiology at Western University, in the Faculty of Health Sciences. Dr. Scollie's research focuses on development of fitting and verification algorithms and procedures for high technology hearing aids, evaluation of outcomes, and knowledge translation of evidence to clinical practice, hearing aid prescription, and early hearing detection and intervention.





Laurel Christensen, PhD

Dr. Christensen leads Global Audiology for GN Hearing, based in Ballerup, Denmark. Global Audiology is responsible for GN Hearing's activities related to product development and launch, including trials, regulatory activities, audiology support to product marketing, and training and education subsidiaries worldwide. Dr. Christensen holds adjunct faculty appointments at Northwestern and Rush Universities in Chicago. She served as an Associate Editor for both Trends in Amplification and the Journal of Speech and Hearing Research. She has presented well over 250 talks worldwide, mainly on hearing aid signal processing, and has many publications, including book chapters on hearing aid technology.





Jessica Dancis, MA

Jessica Dancis is a Senior Marketing Manager at Sonova. She manages the Sennheiser Hearing portfolio, an innovative line up of early entry devices. Jessica is an experienced clinical audiologist. She has more than 16 years of experience in various roles at Sonova, including her previous role as National Key Account Manager. Jessica is passionate about audiology and a fervent proponent of HCPs. She enjoys making a difference in the life of people by giving them access to technology that allows them to hear the world.





Steve DeMari, MS

Steve earned his MS in Audiology from Syracuse University and has been an Audiologist for over 35 years and has served in a variety of leadership roles. Most recently, he was Vice President of Sales and Account Management and Director of Audiology for United Healthcare Hearing. Previously, he was Director of Government Services and Business Development for Phonak, Starkey, and Sivantos as well as clinical audiologist and manager for a wide demographic of medical and private practice clinics in Los Angeles and Chicago.

Steve was instrumental in launching the state's first Universal Newborn Hearing Screening Program in Illinois. Steve is a member of the American Academy of Audiology, the American Speech-Language-Hearing Association, IHS and Illinois Academy of Audiology. He stays highly involved in the industry through continuing education seminars, conferences and social networks and professional blogs.





Dave Fabry, PhD

Dave Fabry is Chief Hearing Health Officer at Starkey, where he has worked since 2009. He has also held several other industry positions, as well as academic positions at Walter Reed Army Medical Center, Mayo Clinic and Mayo Graduate School of Medicine, and the University of Miami Medical Center. He currently serves on the Board of Directors for the American Auditory Society and is a Past President and Board Member for the American Academy of Audiology. He is a licensed Audiologist in Minnesota, Florida and Rwanda.





Dana Helmink, AuD

Dana earned her Master of Arts in Audiology from Northern Illinois University and her Doctor of Audiology degree from Salus University. She worked in clinical audiology in Illinois, where she also served more than 10 years on the board of directors of the Illinois Academy of Audiology. With more than 15 years in global product management, Dana applies her experience in user-centered design and usability testing to develop innovative training programs. She loves creating educational experiences that make it easy for professionals to embrace new technology and provide patients with access to the best hearing care solutions. She is a proud Chicago native and currently resides in the northwest suburbs with her family. In her spare time she attempts to train her Boston Terrier to do cute tricks.





Jessica Lovell, VP, BA

Jessica Lovell, VP, Client Marketing for Synchrony Health and Wellness and Audiology lead. She leads marketing relationships with clients, partners, and associations to develop and implement marketing and communication strategies that align with patient, provider, business, and financial goals. Jessica has 15+ years of marketing experience at companies such as Synchrony, Citibank, and The PGA TOUR. Jessica obtained her BA in Marketing from Auburn University while lettering on Auburn's golf team.





Natasha McDougald

Graduating in Management Information Systems, Natasha McDougald began her career as a system analyst working with tech companies in the Silicon Valley. Personal circumstances became a catalyst for career change; transitioning from desktop based computers to tiny embedded biomedical computers known as cochlear implants. Natasha has worked at Cochlear Americas for over 11 years partnering with clinicians and surgeons at the University of Miami, UCSF, Stanford, UC Davis and UCSF Benioff Children's Hospital of Oakland to bring cochlear and bone conduction implants to pediatric and adult patients. Currently the Director, Product Marketing for Cochlear Americas, Natasha is professionally and personally invested in the implantable hearing industry and strives to forward the cause of those affected by hearing loss. She has presented numerous talks and courses on hearing loss, multiple disabilities, advocating skills and cochlear implantation to audiences in the medical-technology, educational, special needs and family support sectors.





Brian Taylor, AuD

Brian Taylor is a Doctor of Audiology and Senior Director of Audiology for Signia. He is also the editor of Audiology Practices, a quarterly journal of the Academy of Doctors of Audiology, editor-at-large for Hearing Health and Technology Matters and adjunct instructor at the University of Wisconsin. Dr. Taylor has authored several peer reviewed articles and textbooks and is a highly sought out lecturer. Brian has nearly 30 years of experience as both a clinician, business manager and university instructor.



Learning Outcomes

After this course, participants will be able to:

- Describe a specific innovation within the company's product line that integrates consumer products with hearing industry products.
- Discuss the ways in which product integration is reshaping the hearing healthcare landscape from the consumer's point of view.
- Identify a specific feature of a product that is commonly underutilized or misunderstood within the context of the hearing industry.



Give us an example of an innovation in your company's product line that integrates consumer products with hearing industry products.

Jessica Lovell – Care Credit

Steve Demari – CaptionCall

Jessica Dancis – Sennheiser

Natasha McDougald – Cochlear

Dave Fabry – Starkey



A photograph of an elderly couple smiling and embracing each other outdoors. The man is on the left, wearing a blue and white plaid shirt, and the woman is on the right, wearing a light pink top. They are both looking towards the camera with joyful expressions. The background is a soft-focus outdoor setting with green grass and white flowers.

An innovation in Care Credit's product line that integrates consumer products with hearing industry products

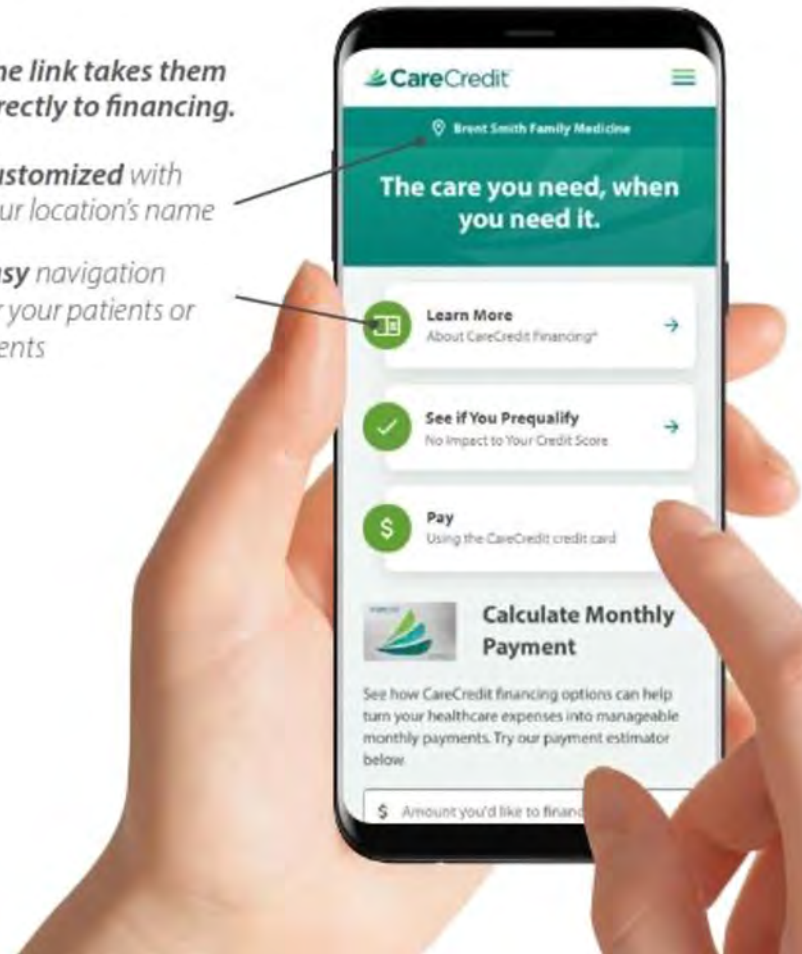
Jessica Lovell, VP Client Marketing
Synchrony Health and Wellness

Custom Link

One link takes them directly to financing.

Customized with your location's name

Easy navigation for your patients or clients



Benefits of Custom Link

- Contactless applications and payments
- All-in-one convenience from anywhere
- Helps reduce barriers with prequalification
- Private and secure
- More freedom for team members
- Insights on who's ready with financing

How it Works

- This simple online solution allows your patients to
 - **Learn** how CareCredit can help fit care into their monthly budgets.
 - **See if they prequalify** with no impact to their credit score.
 - **Apply** for the CareCredit credit card from their own device, get a decision within seconds and, if approved, use their account the same day.*
 - **Calculate** monthly payments.
 - **Pay** with CareCredit online for services your location provided using their CareCredit credit card.**

**The pay option will only appear on your custom link if you have selected to [accept online payments](#).*



CLOSING THOUGHTS:

An innovation in Care Credit's product line that integrates consumer products with hearing industry products

Jessica Lovell, VP Client Marketing
Synchrony Health and Wellness

An innovation in
CaptionCall's product line
that integrates consumer
products with hearing
industry products

Steve DeMari, MS

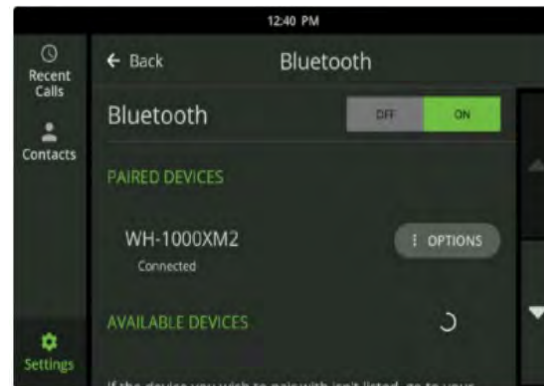


INNOVATION: CaptionCall with Hearing Products

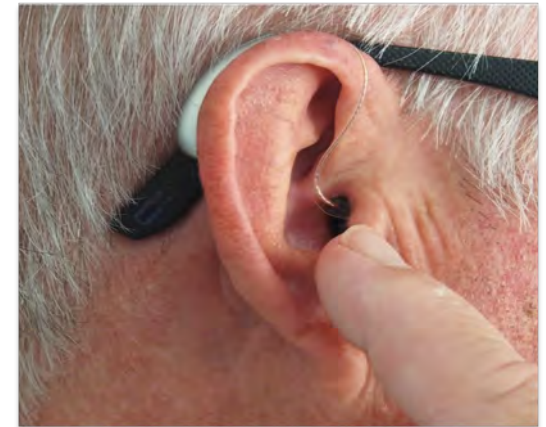


**CaptionCall
Mobile**

Bluetooth Connection



**Hearing Aid
Audio**



Audiogram Compatibility



CLOSING THOUGHTS:

An innovation in CaptionCall's product line that integrates consumer products with hearing industry products

Steve DeMari, MS





An example of an innovation in Sennheiser's product line that integrates consumer products with hearing industry products.

Jessica Dancis, MA

Sonova's Vision

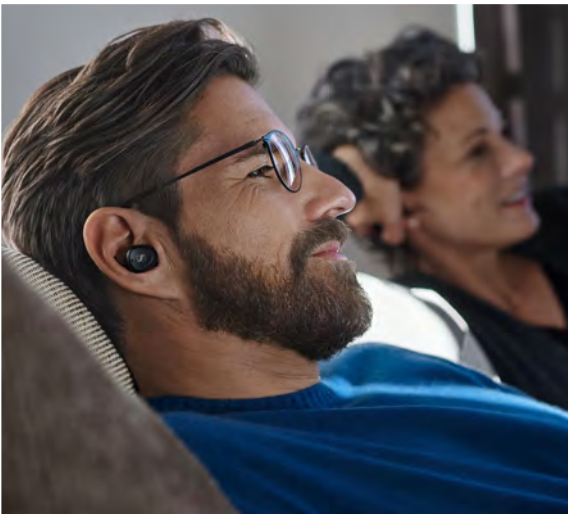


We view early-entry solutions as a way of improving consumer access to hearing care, particularly in the early stages of the hearing journey. With our new Sennheiser Hearing Portfolio we provide products and services for **HCPs to participate in new opportunities and to deliver their services to as many consumers as possible.**

Sennheiser Hearing Portfolio



TV Hearing



TVS 200: Effortless hearing when watching TV or listening to content on a mobile media device.

USE: **MEDIA CONSUMPTION**

Conversation Hearing



ConC 400: Improvement of the hearing in noisy environments where ability to distinguish speech is a challenge.

USE: **SITUATIONAL**

All-Day Hearing



All-Day Clear: All-Day Hearing Aids are medical devices designed for individuals with a perceived mild to moderate hearing loss, for all-day wear in everyday environments

USE: **ALL-DAY**

All-Day Clear Ready-to-wear Hearing Aids



Q1



All-Day Clear

Maximum OSPL90/FOG
110/34 dB SPL



All-Day Clear Slim

Maximum OSPL90/FOG
109/32 dB SPL

Designed for the modern consumer

- ▶ 2 automatic environments
- ▶ MFA connectivity
- ▶ Sold as a pair
- ▶ Sleek and contemporary designs
- ▶ Rechargeable
- ▶ One-size fits most
- ▶ Easyline TV Connector compatible
- ▶ Set-up via All-Day Clear app by consumer
- ▶ Comprehensive online support system
- ▶ 1 year manufacturer's service warranty
- ▶ Option for In-Clinic Care Package



In-Clinic Care Package

The In-Clinic Care Package takes the All-Day Clear experience to the next level by adding your professional expertise. Available only in clinic, it consists of:

- ▶ Minimum one in-person consultation
- ▶ Programming with the Unitron TrueFit™ Software
- ▶ An additional year of manufacturer's warranty

Pricing

MAP	\$250
Unlocking Fee	\$50
Margin	\$200

All-Day Clear Online Sales



All-Day Clear Website

All-DayClear.com

All-Day Clear HCP dedicated webstore

All-DayClear/[ABCHearingClinic.com](#)

HCP independent eCommerce

[ABCHearingClinic.com](#)

HCP selected at checkout through [Find A Provider](#) tool



[ABC](#) pre-selected as provider
No provider locator



- Website built, promoted and managed by Sennheiser Hearing
- Order fulfillment by Sennheiser Hearing
- All transactions between Sennheiser Hearing and consumer
- Repairs and returns arranged online by consumers

- Website built, promoted and managed by HCP
- Order fulfillment by HCP
- All transactions between HCP and consumer
- Repairs and returns arranged online by HCP

\$100 commission on All-Day Clear and the lead

\$600 margin on All-Day Clear

All-Day Clear maximize your opportunities



Capture consumers earlier in their journey



Leverage new sales channels



Maximize your online opportunities



Minimize "tested not sold" drop-outs



Build a gateway to future sales and care



CLOSING THOUGHTS:

An example of an innovation in Sennheiser's product line that integrates consumer products with hearing industry products.

Jessica Dancis, MA

Hear now. And always



An example of an innovation in
Cochlear's product line that
integrates consumer products
with hearing industry products

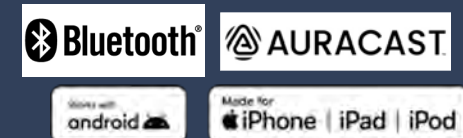
Natasha McDougald

Nucleus[®] 8 Sound Processor: Smaller. Smarter. Better connected

Smallest and lightest^{1^} behind-the-ear sound processor solution, designed for greater comfort and discretion

More **connectivity** options to keep your patients connected today and tomorrow

Smarter^{*} hearing performance technology to help deliver clearer sound²⁻⁵



fire

New **ergonomic shape**, **improved water resistance (IP68)**[#] and new **silver** color for active and unique lifestyles

1. Cochlear Limited. D1190805. (2022 Apr). 2. Cochlear Limited. D1864200. (2022 Apr). 3. Mauger SJ et al. Int. Journal Of Audiology. (2014 Aug); 53(8):564-576. [Sponsored by Cochlear]. 4. Mauger SJ et al. Int. Journal Of Audiology. (2017 Jan); 9; 1-10. [Sponsored by Cochlear]. 5. Wolfe J et al. Otol and Neurotol. (2015 Aug); 36(7):1181-90. [Sponsored by Cochlear].

[^] Comparison made using the Compact Battery Module for Nucleus 8 Sound Processor and the Compact Rechargeable Battery for Nucleus 7 Sound Processor. ^{*} Compared to previous generation SCAN. It is recommended that SNR-NR, WNR and SCAN be made available to any recipient, ages 6 and older, who is able to 1) complete objective speech perception testing in quiet and noise in order to demonstrate and document performance and 2) report a preference for different program settings. [#] The Nucleus 8 Sound Processor is dust and water resistant to level of IP68 of the International Standard IEC60529. The Nucleus 8 Sound Processor was tested to a depth of up to 1 metre for up to 1 hour. The Nucleus 8 Sound Processor with Aqua+ can be continuously submerged under water to a depth of up to 3 metres for up to 2 hours. Refer to the relevant user guide for more information. ^{*} Compatibility determined via testing with a subset of the Amazon products running the ASHA protocol. Amazon ASHA enabled devices can be seen here: [Accessibility Features for Fire TV - Amazon Customer Service](#). Amazon[®] and Amazon Fire[™] are trademarks or registered trademarks of Amazon in the U.S. and other countries. Android is a trademark of Google LLC. The Android robot is reproduced or modified from work created and shared by Google and used according to terms described in the Creative Commons 3.0 Attribution License. Google Play and the Google Play logo are trademarks of Google LLC. Apple, the Apple logo, Apple Watch, FaceTime, Made for iPad logo, Made for iPhone logo, Made for iPod logo, iPhone, iPad Pro, iPad Air, iPad mini, iPad and iPod touch are trademarks of Apple Inc., registered in the U.S. and other countries. App Store is a service mark of Apple Inc., registered in the U.S. and other countries. The Bluetooth[®] word mark and logos are registered trademarks owned by Bluetooth SIG, Inc. and any use of such marks by Cochlear is under license.

Hear now. And always



CLOSING THOUGHTS:

An example of an innovation in Cochlear's product line that integrates consumer products with hearing industry products

Natasha McDougald

An example of an innovation in Starkey's product line that integrates consumer products with hearing industry products

Dave Fabry, PhD



2020

466 Million

with hearing loss

By 2050,

~1 Billion

1 in 6 Teens

have hearing loss due to
high-volume sounds

OVER THE NEXT DECADE

Fastest growing
age demographic

85+

Second fastest

100+

More people 60+

than ever before



Worldwide prevalence
of hearing problems

15%

Hearing
problems by
age group

≥ 75

≤ 64

Sizing the Market

Market Penetration

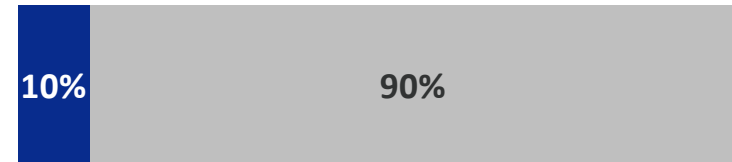
15% Profound hearing problems (Loss of 90+ dB)



35% Moderate hearing problems (Loss between 40-70 dB)



50% Mild hearing problems (Loss between 20-40 dB)



■ WITH hearing system ■ WITHOUT hearing system

2021-2031

Global Market Outlook

2021

Hearing Protection Devices Market Size

\$1.7B US

2031

Projected market value

\$5B US

2021-2031

Global Market Growth Rate

10.1% CAGR

TOP FIVE

countries market share

60.2%



Hearing Protection Devices Market

Global Industry Analysis 2016–2020 and

Forecast 2021–2031, By Protection

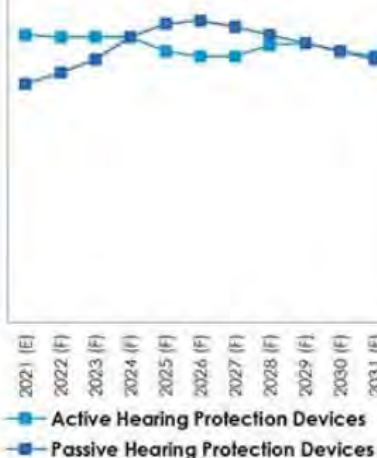
CAGR 10.1%

2021–2031

Market Share



Y-o-Y Growth Analysis



Source: Persistence Market Research

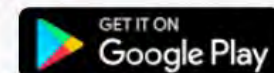
Note: Market shares not depicted as per actual scale – only for illustration purposes

SoundCheck Live

Find out if noise around you is safe or potentially harmful to your hearing using the SoundCheck Live sound level meter.

Learn about environmental noise and how it may impact your hearing.

Discover ways you can protect your hearing — everything from hearing protection devices like SoundGear, to limiting your exposure.



Q3

Discover the Innovation

BLUETOOTH, CUSTOM, CONVENIENT, COMFORTABLE



22 dB NRR

2.4 GHz technology
for audio streaming

Adaptive Feedback Cancellor

**Enhanced power
management features

Wind Noise Management

**2-way Audio mic (iOS only)

Push Button and Rotary VC

23 hours of battery life including
4 hours of streaming

Lithium-ion rechargeable battery
and Custom Charger

Apple & Android Compatibility

4 digital listening modes

90/30 Matrix

Faceplate Color



Shell Colors



CLOSING THOUGHTS:

An example of an innovation in Starkey's product line that integrates consumer products with hearing industry products

Dave Fabry, PhD



How do you see product integration as changing the hearing healthcare landscape from the consumer's point of view?

Brian Taylor – Signia

Dave Fabry – Starkey

Laurel Christensen – ReSound

Steve DeMari – CaptionCall





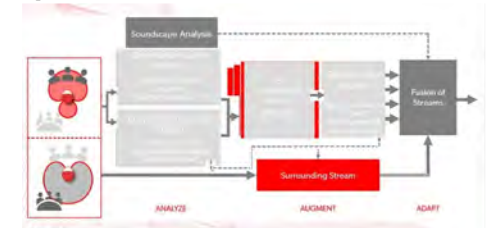
How do you see product integration
changing the hearing healthcare landscape
from the consumer's point of view?

Brian Taylor, AuD

Signia's Consumer-Centric Innovations

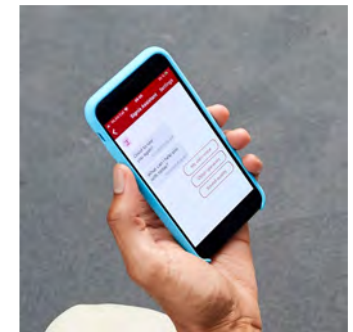
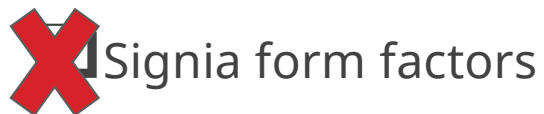
- IX platform with multi-stream architecture engineered to optimize performance in conversations

(See Navid Taghvaei's AO course: [Unleashing the Power of Conversation](#))



- Signia Assistant using a live neural network with real-time, self-adjustments

(See 2023 AO paper: [How AI-Driven Hearing Aid Features and Fresh Approaches to Counseling Can Promote Better Outcomes](#))



Why Form Factors Matter?

- 85% of adults in the US who self-report “trouble hearing” and fail to seek treatment¹
- An 8-year average delay in seeking help²
- Low daily use time rates³
- Up to 15% of adults have normal audiograms and self-reported hearing difficulty, many benefit from amplification⁴

1. Humes L. E. (2023). U.S. Population Data on Hearing Loss, Trouble Hearing, and Hearing-Device Use in Adults: National Health and Nutrition Examination Survey, 2011-12, 2015-16, and 2017-20. Trends in Hearing, 27.
2. Simpson AN, Matthews LJ, Cassarly C, Dubno JR. (2019) Time From Hearing Aid Candidacy to Hearing Aid Adoption: A Longitudinal Cohort Study. Ear Hear. 40(3):468-476.
3. Dillon, H; Day, J.; Bant, S; Munro, K/ (2020) Adoption, use and non-use of hearing aids: a robust estimate based on Welsh national survey statistics. International Journal of Audiology. 59(8), 567-573.
4. Mealings K, Valderrama JT, Mejia J, Yeend I, Beach EF, Edwards B. (2024) Hearing Aids Reduce Self-Perceived Difficulties in Noise for Listeners With Normal Audiograms. Ear Hear. 45(1):151-163



Stigma

- Process by which people experience a lowering in social status as a result of a condition⁵
- Aging, cognitive decline and hearing loss are all stigmatizing conditions⁶
- 2 components: 1.) Fear of diagnosis, and 2.) Visibility of treatment⁷
- 21% of hearing aid non-owners cited stigma as a barrier to pursuing hearing aids – even when lower cost DTC options were made available to them⁸

5. Bos, B; Pryor, J; Reeder, G (2013) Stigma: advances in theory and research. Basic App Soc Psych. 35(3), 1-9.

6. Davis A, McMahon CM, Pichora-Fuller KM, Russ S, Lin F, Olusanya BO, Chadha S, Tremblay KL. (2016) Aging and Hearing Health: The Life-course Approach. Gerontologist.56 Suppl 2(Suppl 2):S256-67.

7. Ruusuvuori JE, Aaltonen T, Koskela I, Ranta J, Lonka E, Salmenlinna I, Laakso M. (2021) Studies on stigma regarding hearing impairment and hearing aid use among adults of working age: a scoping review. Disabil Rehabil. 43(3):436-446.

8. Williams, N. (2021). Addressing hearing loss stigma within the OTC context. Auditory Insight

9. Research Note, Q3. Downloaded at: https://auditoryinsight.com/wp-content/uploads/securepdfs/2021/11/Auditory_Insight_Stigma_AntiS

10. moking_Analog_Q3_2021.pdf



Consumer-centric form factors from Signia

Q5

Each has a stigma-reducing trait⁹



Styletto^A



Silk IX Charge & Go^B



Active Pro^C

- A. De-identification: Remove the most identifiable features associated with hearing aid use
- B. Concealment: Make the device as invisible as possible
- C. Normalization: Make the device look like a common, non-stigmatizing device (e.g., consumer earbud)



9. Marcoux, A., Dostaler, M., & Olesen, D. (2022). Signia Active: The beginning of an era of hearing without stigma. *Canadian Audiologist* 9(1).

Recent Survey of Adults with Self-Reported Hearing Loss¹⁰



- 384 respondents were shown Photo 1 (left) and then Photo 2 (right)
- “Would you try and purchase any of these devices?”
- Results: Non-buyer rate decreased 21% when Styletto, Active and Silk form factors are among the choices of devices to try

¹⁰, Marcoux, A, Taylor, B & Oleson, D (2023) The Appeal of Signia's Innovative Form Factors and Their Role in the Adoption of Hearing Aids. Canadian Audiologist 10(6).



Implications for Changing Hearing Healthcare Landscape

Provision of New, Innovative Form Factors:

- Styletto IX, Silk IX Charge & Go
- Increases adoption rate of hearing aids
- Attract non-buyers:
 - Those concerned about stigma
 - Younger
 - Normal or near-normal audiograms
 - Desire situational use/multi-tasking





CLOSING THOUGHTS:

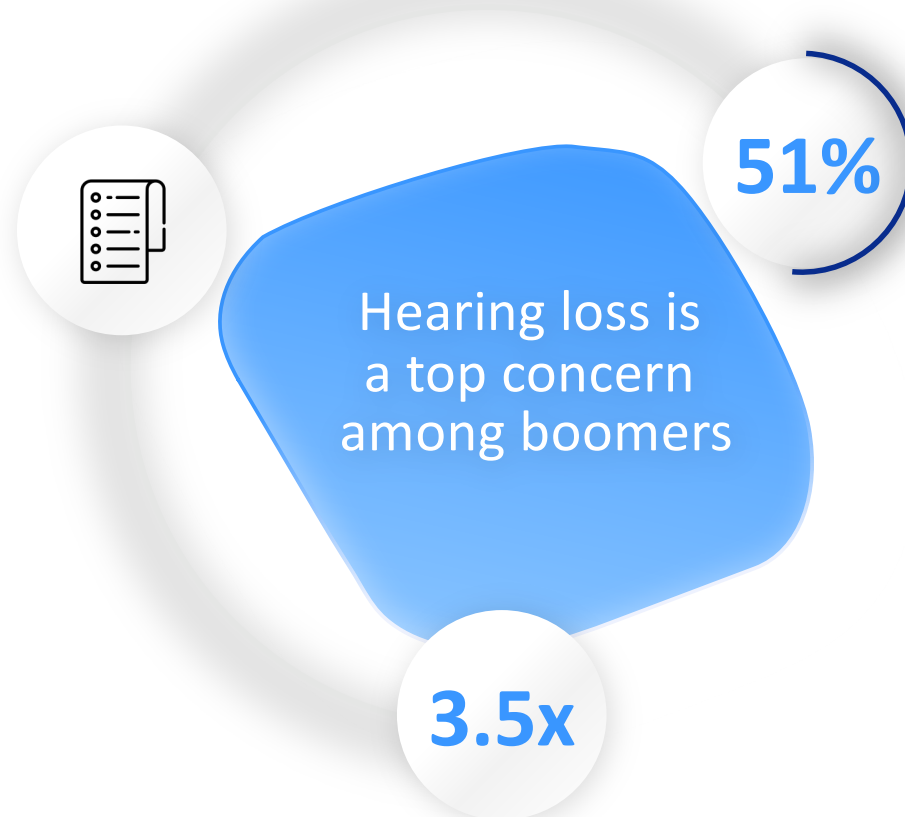
How do you see product integration changing the hearing healthcare landscape from the consumer's point of view?

Brian Taylor, AuD

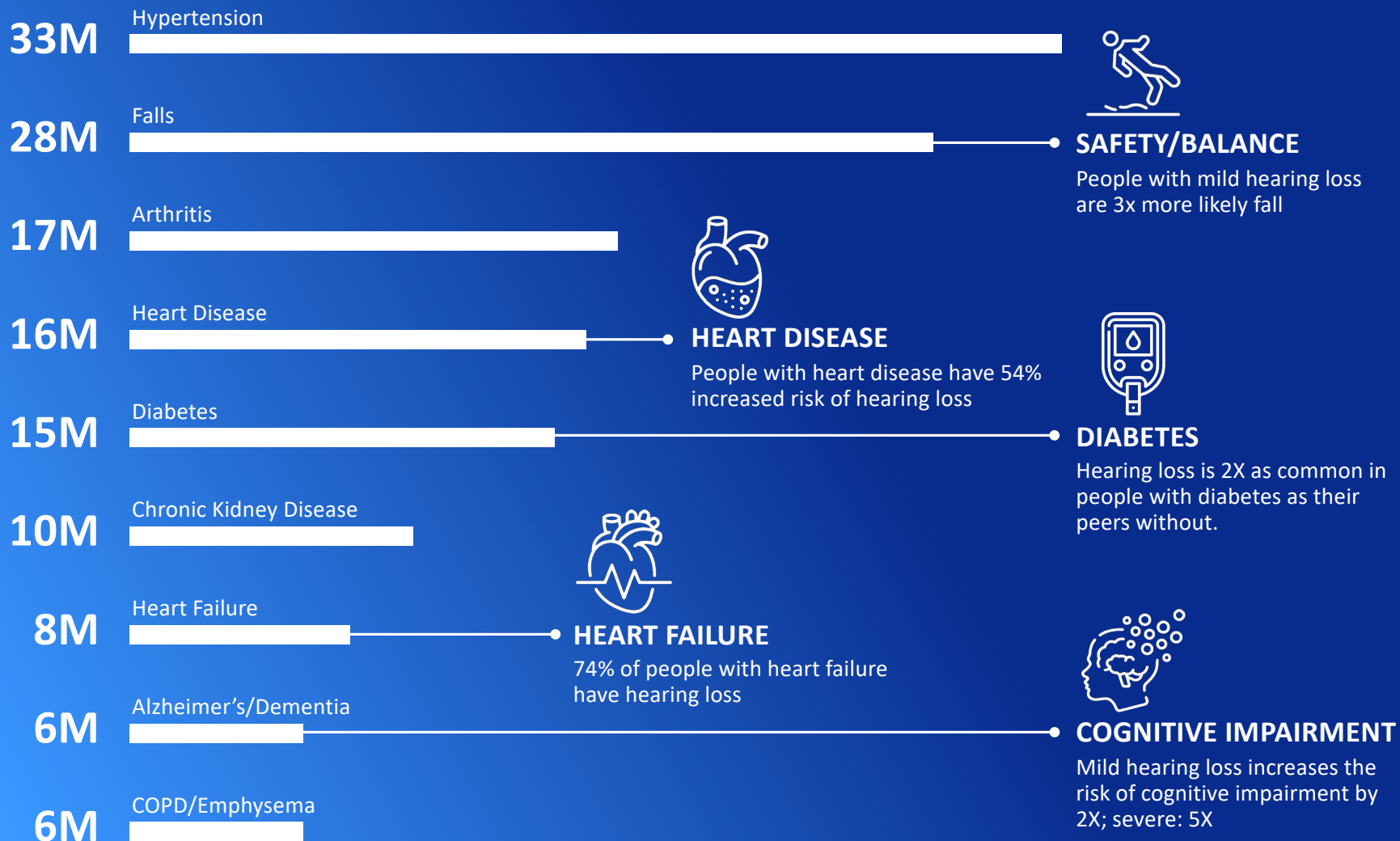
How do you see product integration changing the hearing healthcare landscape from the consumer's point of view?

Dave Fabry, PhD





Hearing Loss is **CORRELATED** with Most Common Chronic Conditions



ACHIEVE Study

Aging and Cognitive Health Evaluation in Elders

A landmark randomized controlled trial to determine how hearing intervention affects brain health in older adults

MAIN
FOCUS



Cognitive
Decline

OTHER
AREAS



Brain
structure



Mental
health &
well-being



Physical
function



Healthcare
use

High adherence
& satisfaction with
hearing intervention
sustained over 3 years

Positive effects* in
communication
impairment, loneliness,
& social network size
and diversity

Hearing intervention
reduced 3-year global
cognitive decline by 48%
in the ARIC cohort[†]

*self-perceived

[†]Atherosclerosis Risk in Communities (ARIC) study is to investigate the causes of atherosclerosis and to measure how cardiovascular risk factors, medical care, and outcomes.



CLOSING THOUGHTS:

How do you see product integration changing the hearing healthcare landscape from the consumer's point of view?

Dave Fabry, PhD

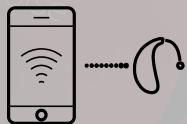


How do you see product integration as changing the hearing healthcare landscape from the consumer's point of view?

Laurel Christensen, Ph.D.
GN Hearing
Chief Audiology Officer

Bluetooth® LE Audio

Calls and streaming from device



Direct connectivity to smartphone, tablets and computers for calls and streaming using Bluetooth Low Energy

Broadcasting



Stream sound to hearing aids using new TV streamer with Auracast technology and ready for Auracast Public Transmission

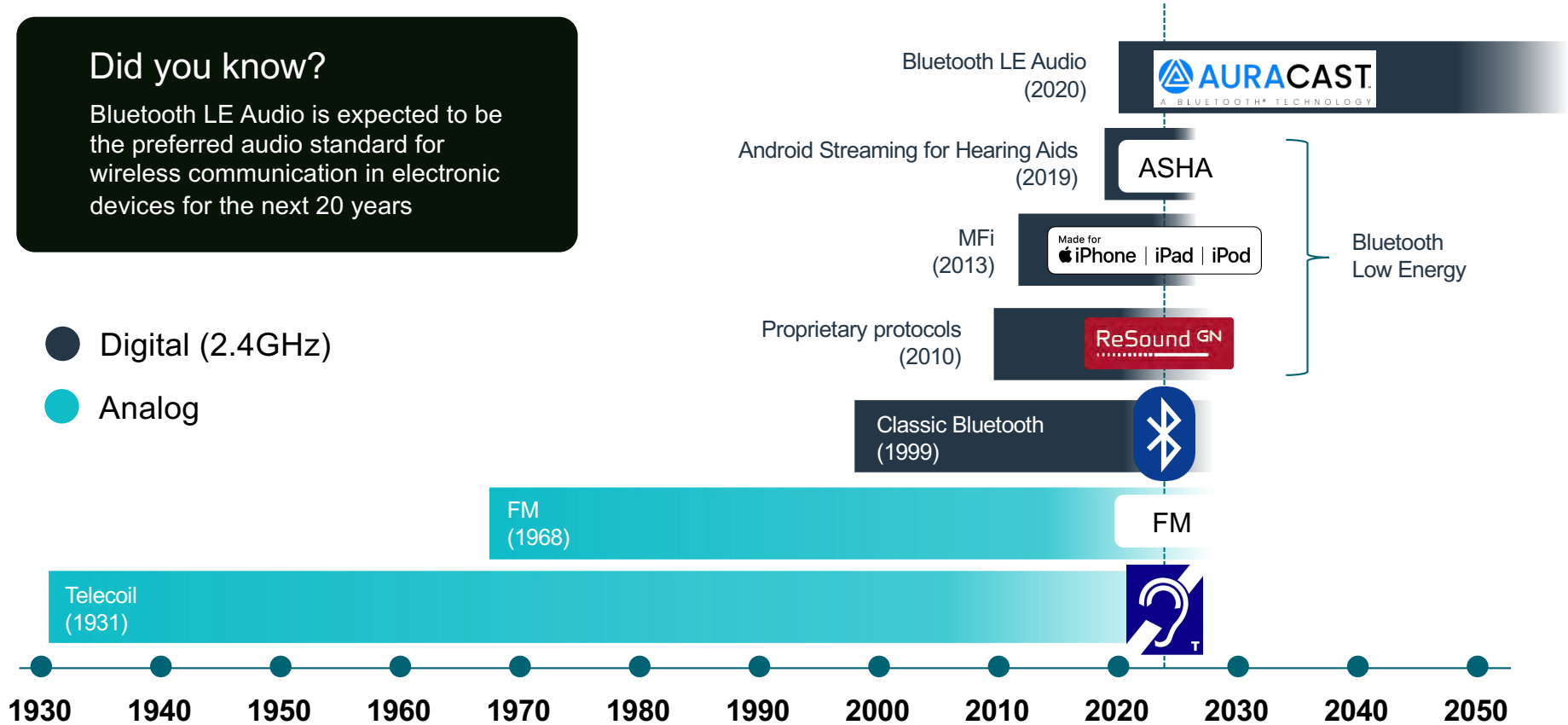
Current landscape

Did you know?

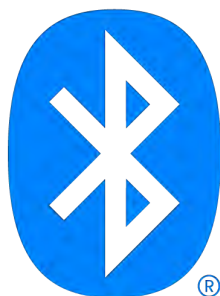
Bluetooth LE Audio is expected to be the preferred audio standard for wireless communication in electronic devices for the next 20 years

- Digital (2.4GHz)
- Analog

Today



Bluetooth SIG, Inc.



Global trade association established in 1998
 Oversees Bluetooth® technology and brand
 Over 38,000 member companies in 150 countries
 Over 5 billion devices shipped each year



Specification



Qualification



Promotion

Bluetooth LE Audio



3 billion Bluetooth LE Audio enabled devices are expected to ship annually by 2027¹



By 2030, 2.5 million locations globally will offer Auracast™ broadcast audio¹



Direct connectivity to smartphone, tablets and computers is in the TOP 3 satisfaction driver for hearing aids²

Source: 1) Bluetooth SIG 2) MarkeTrak 22, 2022

Benefits of Bluetooth LE Audio

Q2

ReSound GN



Improved Codec

Richer sound quality

Lower power consumption



Multi-stream

Connect to multiple devices simultaneously

Two-way communication:
makes possible hands-free
calls* in Android phones

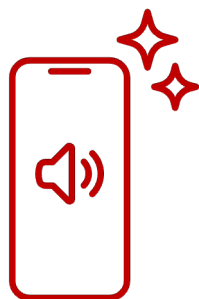


AURACAST
A BLUETOOTH® TECHNOLOGY

Broadcasting and audio
sharing

In personal electronic
devices and public places

Clearest all-day streamed sound with Bluetooth® LE Audio & Auracast™



**Clearest Sound
Quality ***



**Lower battery
consumption***



Lowest Latency*

Auracast will make the world more hearing friendly and accessible for everyone



Share your audio

Shared listening and watching
from your personal device



Hear your best

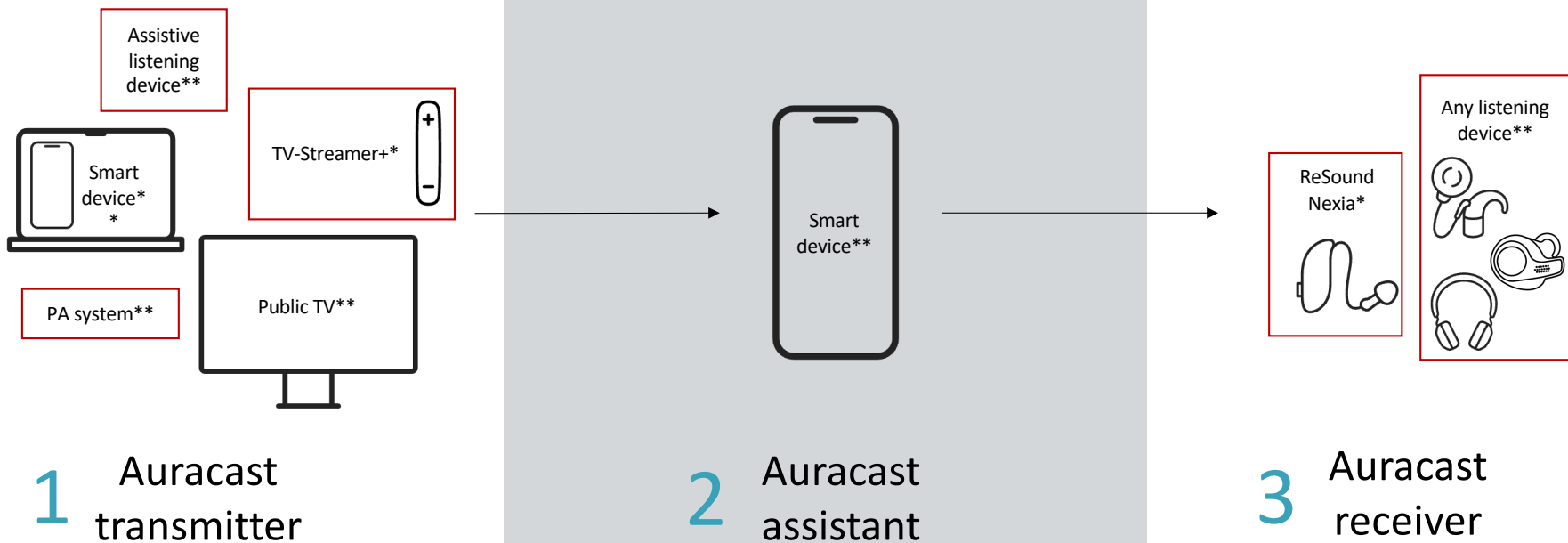
Public address and
assistive listening



Unmute your world

Public TV watching

Easy to join Auracast



TV Streamer +



ReSound GN

New TV-Streamer+

CLOSING THOUGHTS:

How do you see product integration as changing the hearing healthcare landscape from the consumer's point of view?

Laurel Christensen, Ph.D.
GN Hearing
Chief Audiology Officer

How do you see product integration as changing the hearing healthcare landscape from the consumer's point of view?

Steve DeMari, MS



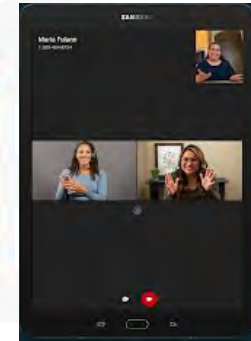
CONSUMER POV: CaptionCall with Hearing Products

CaptionCall Mobile, Wavello, Sorenson for Zoom, Sorenson Express

CaptionCall
Mobile App



Wavello
App



Sorenson
Express



Sorenson
for Zoom



CLOSING THOUGHTS:

How do you see product integration as changing the hearing healthcare landscape from the consumer's point of view?

Steve DeMari, MS



What is a feature of your product that is underutilized or misunderstood?

Dana Helmink – Widex

Jessica Lovell – Care Credit

Natasha McDougald – Cochlear

Brian Taylor – Signia

Jessica Dancis – Sennheiser



What is a feature of your product that is underutilized or misunderstood?

DANA HELMINK, AU.D.

SR. DIRECTOR, AUDIOLOGICAL DEVELOPMENT



LEVERAGING AI TECHNOLOGY TO MEET WEARERS WHERE THEY ARE AT

AUTOMATICS

Trained in the real
world to address
infinite soundscapes

REAL-TIME INTENT

When automatics
are not enough
to anticipate
YOUR intent in a given
listening situation



INTELLIGENCE



WIDEX HAS BEEN CONSIDERING INTENT FOR YEARS



AUDIBILITY



COMFORT

WIDEX

LISTENING INTENTION WITH **SOUNDSense LEARN**

Introduced 2018 with Widex Evoke

First real-time artificial intelligence
(AI) in a hearing aid



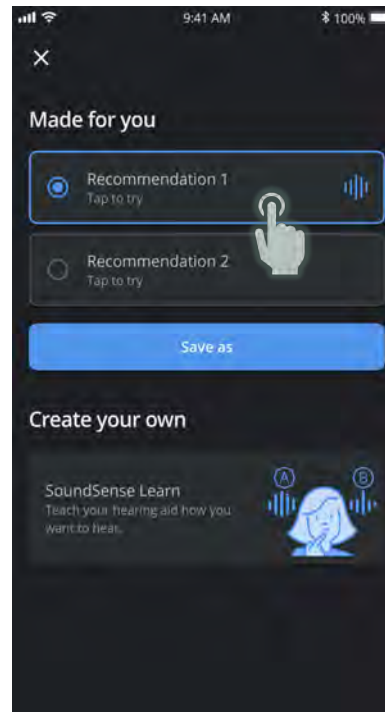
WIDEX

MY SOUND

3rd Generation AI technology
introduced 2021

Making intentional customization
accessible for all users

RECOMMENDATIONS MADE FOR YOU



OPTION TO CREATE YOUR OWN



WIDEX

SAME PERSON – SAME SETTING – DIFFERENT INTENT

Adjust emphasis
Person-specific & situation specific



Focus on nearer/louder inputs



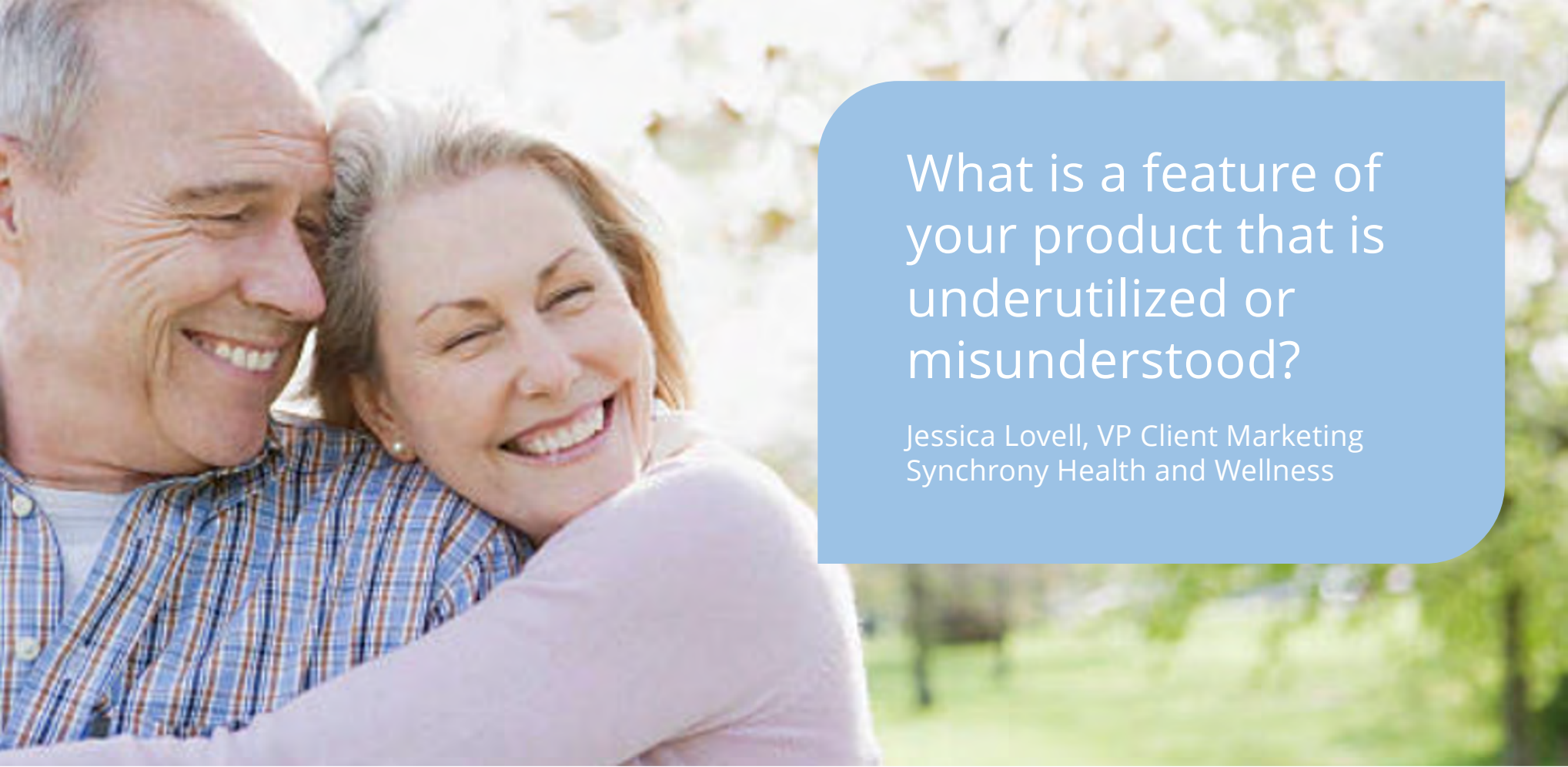
Open to softer/farther inputs



CLOSING THOUGHTS

WHAT IS A FEATURE OF YOUR PRODUCT THAT IS UNDERUTILIZED OR MISUNDERSTOOD?

DANA HELMINK, AU.D
SR. DIRECTOR, AUDIOLOGICAL DEVELOPMENT



What is a feature of
your product that is
underutilized or
misunderstood?

Jessica Lovell, VP Client Marketing
Synchrony Health and Wellness

Two Popular Types of Credit From One Company



Healthcare Credit Card



Installment Loans

Different Patient Payment Preferences



Patients have different considerations and decision points along their hearing health journey.

They have different financial situations, healthcare wants and needs, and attitudes/preferences towards payment options.

People prefer having options so they can choose what works best for them.

Different financing options have different benefits.

Some may look for smart ways to use their money, such as promotional financing.

For some, it's not the total cost- it's fitting payments into their monthly budget.



The CareCredit Credit Card



Revolving credit card can be used again and again at more than 266,000 enrolled locations

More payment options may help more patients accept optimal technology and **achieve life-changing outcomes**

No Interest if paid in full within the promotional period on purchases of \$200+

May help positively impact cash flow, patient satisfaction, reviews and referrals.

Pay over time
with convenient monthly payments

Prequalification check enables patients to see if they prequalify with no impact their credit score

*Health & Wellness 2022 Analytics and 2022 U.S. Census Bureau

Allegro Credit Installment Loans



Installment loan provides predictable monthly payments with fixed interest rate and pay off date

More payment options may help more patients accept optimal technology and **achieve life-changing outcomes**

Installment Loan with **Waived Interest option** if paid in full within the promotional period may be available

May help positively impact cash flow, patient satisfaction, reviews and referrals.

Prequalification check enables patients to see if they prequalify with no impact their credit score

Patients can upgrade to **new technology and pay over time with monthly payments**



CLOSING THOUGHTS:

What is a feature of your product that is underutilized or misunderstood?

Jessica Lovell, VP Client Marketing
Synchrony Health and Wellness

Hear now. And always



What is a feature of your product that is underutilized or misunderstood?

Natasha McDougald

Cochlear™ Remote Care

Your patient, your care, anywhere

Benefits of Cochlear Remote Care



Hear now. And always



CLOSING THOUGHTS:

What is a feature of your product that is underutilized or misunderstood?

Natasha McDougald



What feature is under-utilized or misunderstood?

Brian Taylor, AuD

Signia Assistant

- App-based, live neural network
- Settings tailored to wearer's personal sound quality and speech understanding preferences
- Answers to questions about how to handle hearing aids – better recall of details discussed during your appointment
- 24/7 support



The hearing aid follow-up process



Audiologist

- Much neglected, yet essential part of best-practice care
- 3 is the average number of post-fitting appointments over first year¹
- Each follow-up appointment is a minimum of 30 minutes
- Roughly 1/3 to 1/2 of time is spent fine-tuning devices²



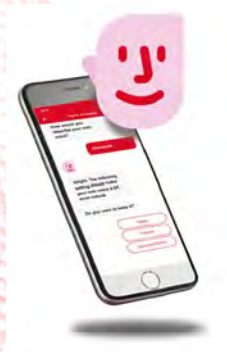
Hearing Aid Wearer

Is there a better way? Can technology assist us?



Audiologist

- Uses machine learning (live neural network) to pool data from thousands of wearers
- Places most common fine-tuning adjustments in the hands of the wearer
- Empowers patient to make decisions in real time
- Frees up time to focus on other important tasks, like counseling^{3,4}



Signia Assistant



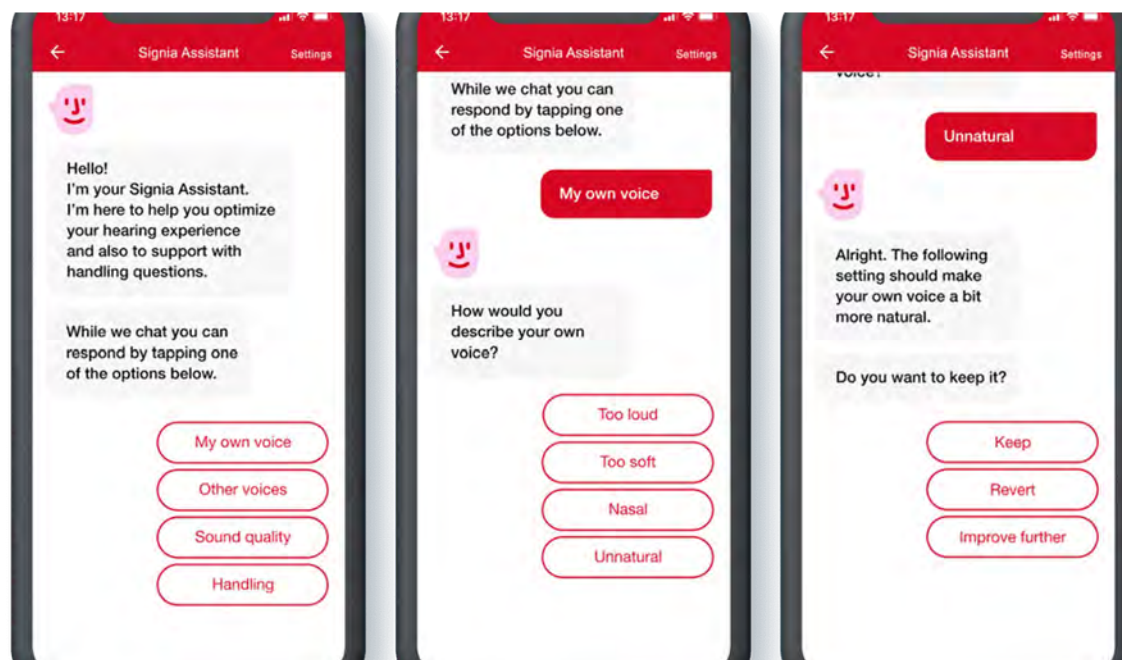
Hearing Aid Wearer



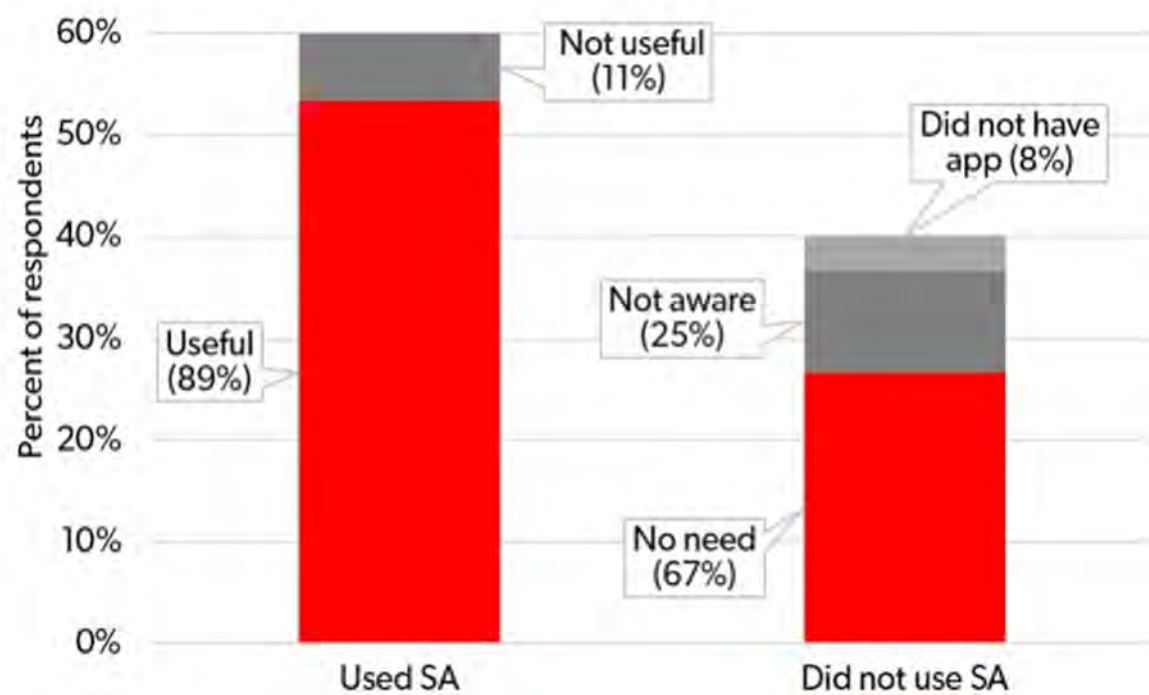
1. Taylor, B. & Jensen, N. (2023). How AI-driven hearing aid features and fresh approaches to counseling can promote better outcomes: part 1, the catch-22 of follow-up care. AudiologyOnline, Article 28670. Retrieved from <https://www.audiologyonline.com>

2. Taylor, B. & Jensen, N. (2023). How AI-driven hearing aid features and fresh approaches to counseling can promote better outcomes: part 2, towards more empowered follow-up care. AudiologyOnline, Article 28727. Retrieved from <https://www.audiologyonline.com>

Signia Assistant app



Recent survey data





CLOSING THOUGHTS:

What feature is under-utilized or misunderstood?

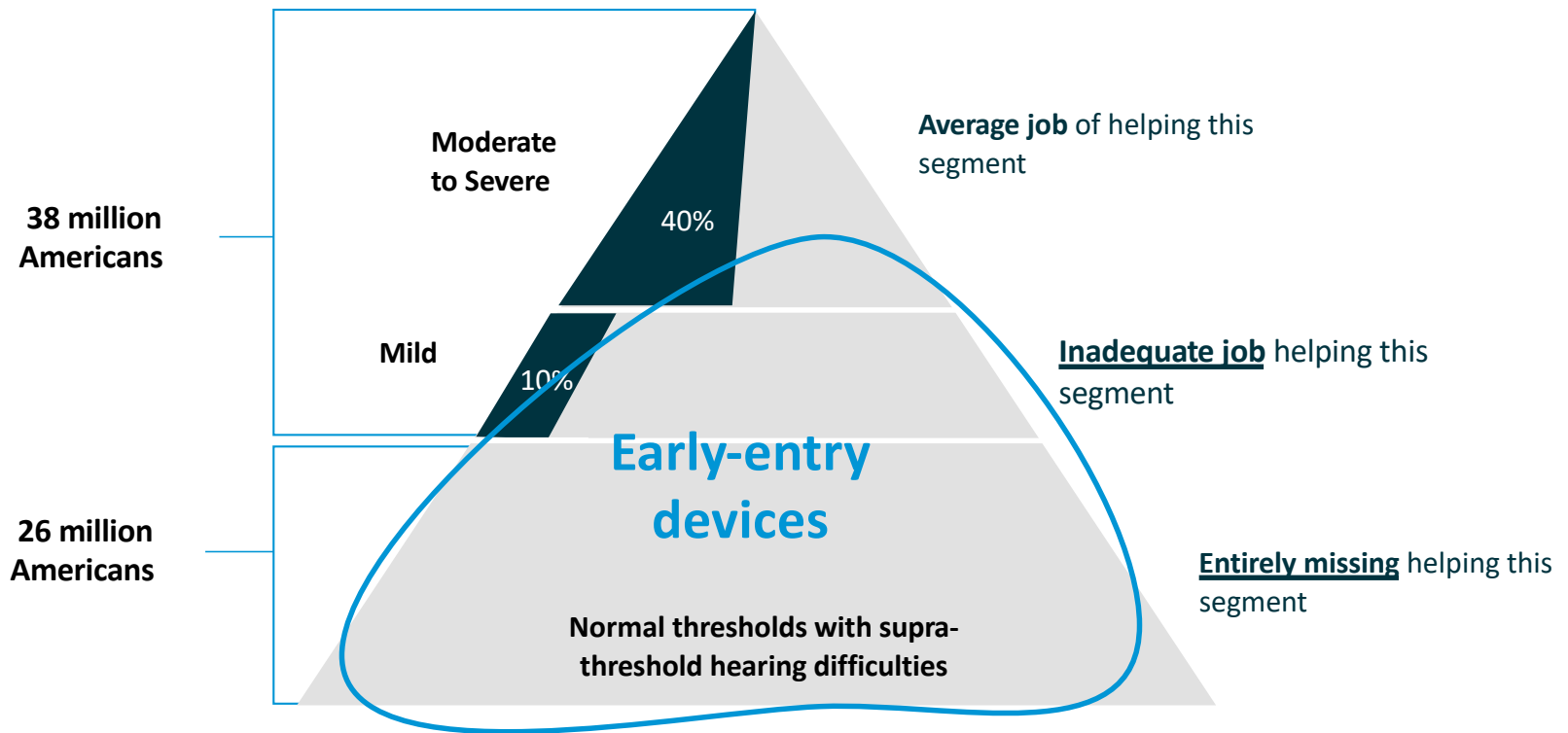
Brian Taylor, AuD



What is a feature of your product that is underutilized or misunderstood?

Jessica Dancis, MA

US Landscape and expanded opportunities



Beck, DL. & Danhauer, J. Amplification for Adults with Hearing Difficulty, Speech in Noise Problems, and Normal Thresholds. Journal of Oto-ENT Research. Vol 1, Issue 1, 2019.
Papesh, MA., Fowler, L., Pesa, SR, & Fredericka, SR. Functional Hearing Difficulties in Veterans: Retrospective Chart Review of Auditory Processing Assessments in the VA Health Care System. American Journal of Audiology, Vol. 32;101–118, March 2023.
Kotchkin S. MarkeTrak VIII: The key influencing factors in hearing aid purchase intent. *Hear Rev.* 2012;19{03}:12-25.

A brand licensed by Sonova

Powered by Sonova technology

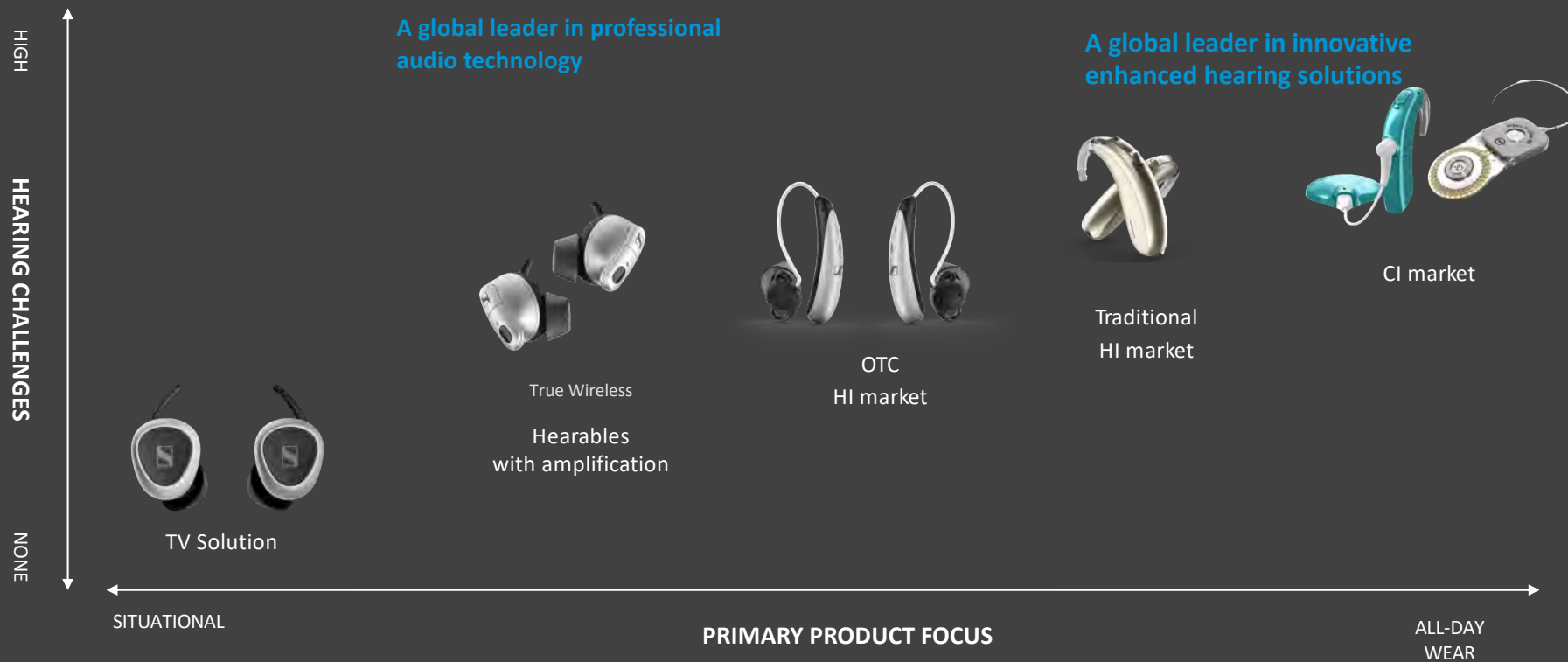


SENNHEISER

A global leader in professional
audio technology

sonova
HEAR THE WORLD

A global leader in innovative
enhanced hearing solutions



All-Day Clear Slim form factor

We keep things simple with our All-Day Clear Slim hearing aid, allowing for a “**one-size-fits-most**” approach with one single wire length.

The **forming wire** is adjustable and can be shaped by hand to feel secure and comfortable on any ear.

The position of the device on the back of the ear does not impact sound performance as the **microphones are on the earpiece** at ear level.



All-Day Clear Unique Sound Profile Self-Fitting



- ▶ **Match the gain needs and sound preferences to new users**
- ▶ Unique processing systematically manipulates the gain, compression ratio (CR) and maximum power output (MPO) together
- ▶ 3 easy steps and the self-fitting steps can be done in 2 minutes.

The **sound quality** of these Sennheiser hearing aids is so far **beyond anything else I've tried** I am **over the moon** about them.

These are **barely noticeable** and substantially more **comfortable** to use over the **entire day**.

It was one of the least tedious, **easy setups** that I have experienced with OTC hearing aids.

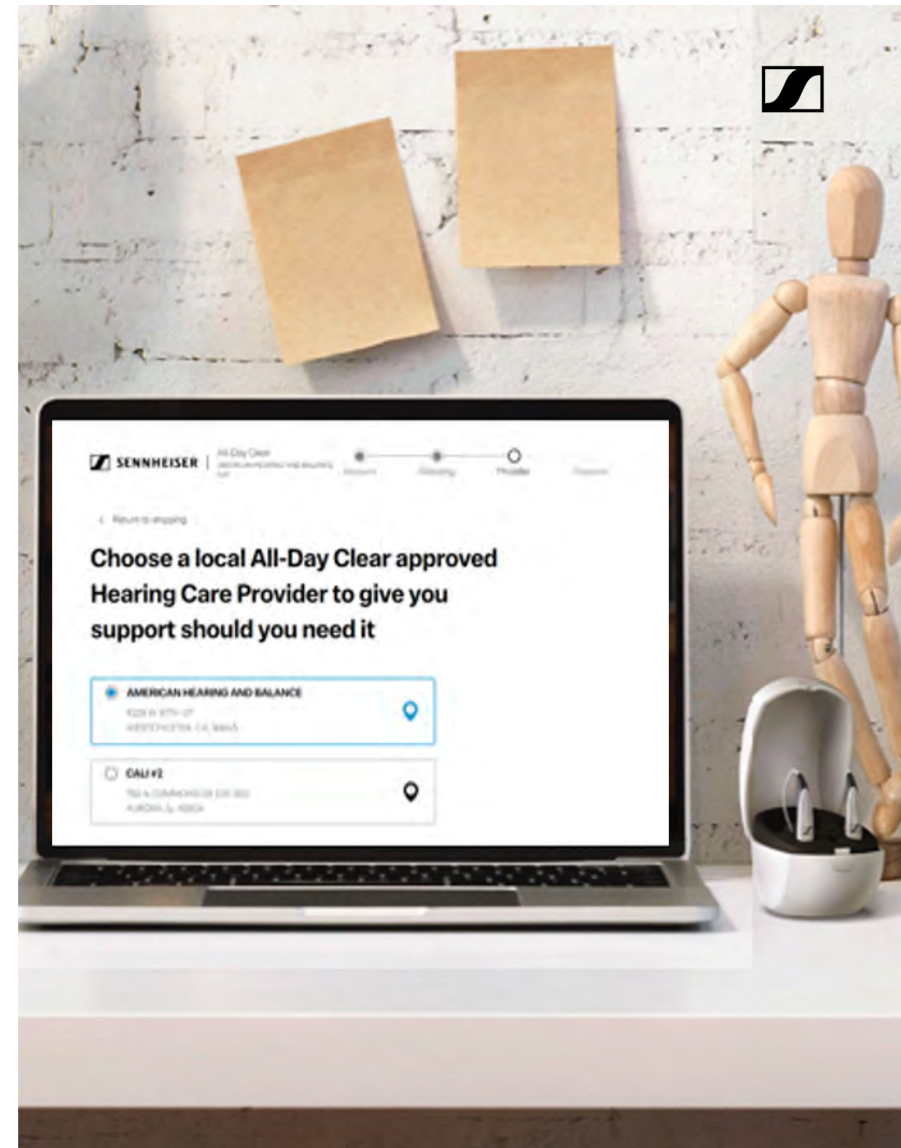
The app had **short learning curve**, accomplished all I wanted, It was an exercise in futility

You can't beat the **sound quality** and **comfort** of these, way to go Sennheiser! Highly recommend!



All-Day Clear

- ▶ Turnkey online and in-clinic solution
- ▶ In-Clinic Care Package and additional service opportunities
- ▶ Funneling consumers to HCPs
- ▶ Build relationships towards future sales and care



Sennheiser Hearing early-entry portfolio solves unmet needs



Don't need or aren't ready for a prescription hearing aid



Tested Not Sold



Online shopping



Solution for background noise



Back-up set / Repair bridge



Gift





CLOSING THOUGHTS:

What is a feature of your product that is underutilized or misunderstood?

Jessica Dancis, MA

What feature or service do hearing healthcare professionals request the most, that simply isn't possible to deliver at this time?

Laurel Christensen – ReSound

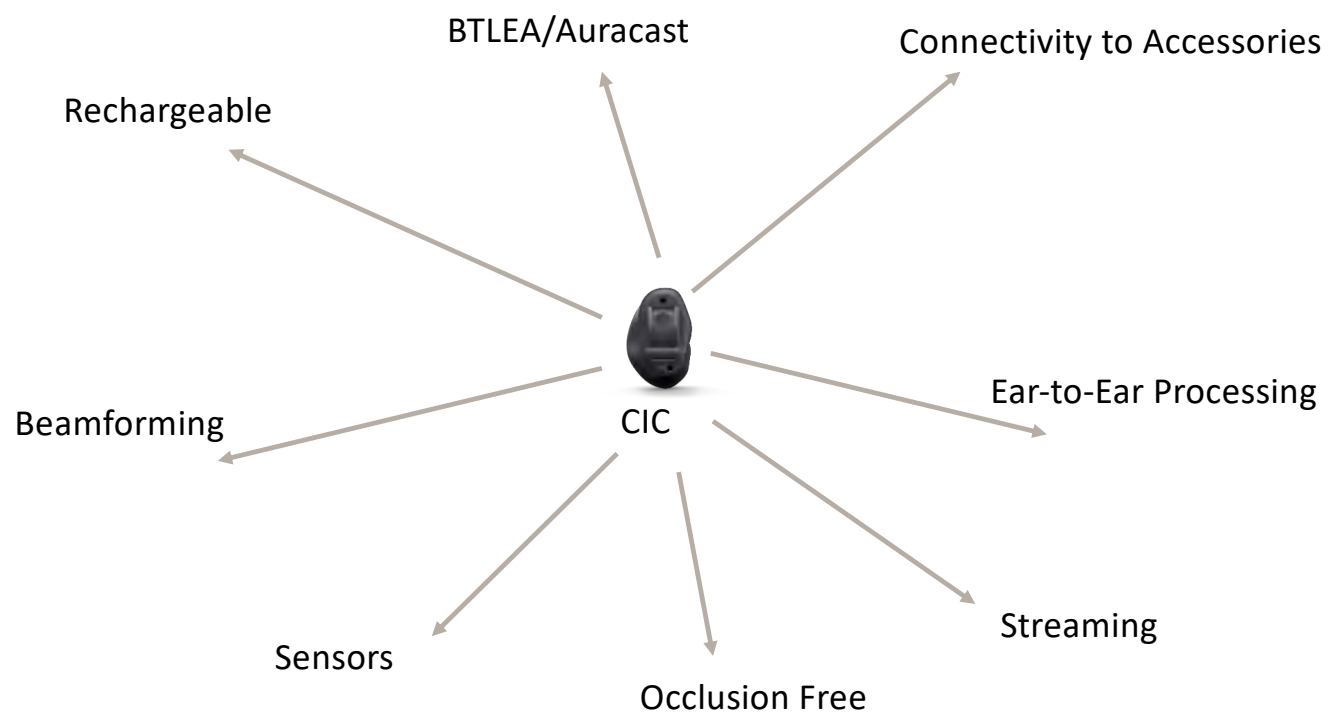
Dana Helmink – Widex



What feature or service do hearing healthcare professionals request the most, that simply isn't possible to deliver at this time?

Laurel Christensen, Ph.D.
GN Hearing
Chief Audiology Officer

My First Thought



Have we solved this problem?

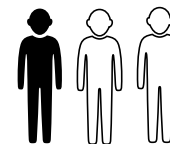
ReSound GN



Hearing conversations in noise is the main reason for purchasing hearing aids¹



Hearing in noise is the #1 driver of hearing aid satisfaction and the biggest unmet need for current users²



Nearly 1 in 3 Hearing aid users are unsatisfied with their ability to hear conversations in noise³

1. Manchaiah and colleagues, 2021

2. Picou, 2020

3. MarkeTrak, 2022

HEARING IN NOISE TEST

Examples

- QUICK SPEECH IN NOISE TEST (Quick SIN)
- HEARING IN NOISE TEST (HINT)

What do they test?

- How well you can understand speech in noise compared to someone with normal hearing.

What is measured?

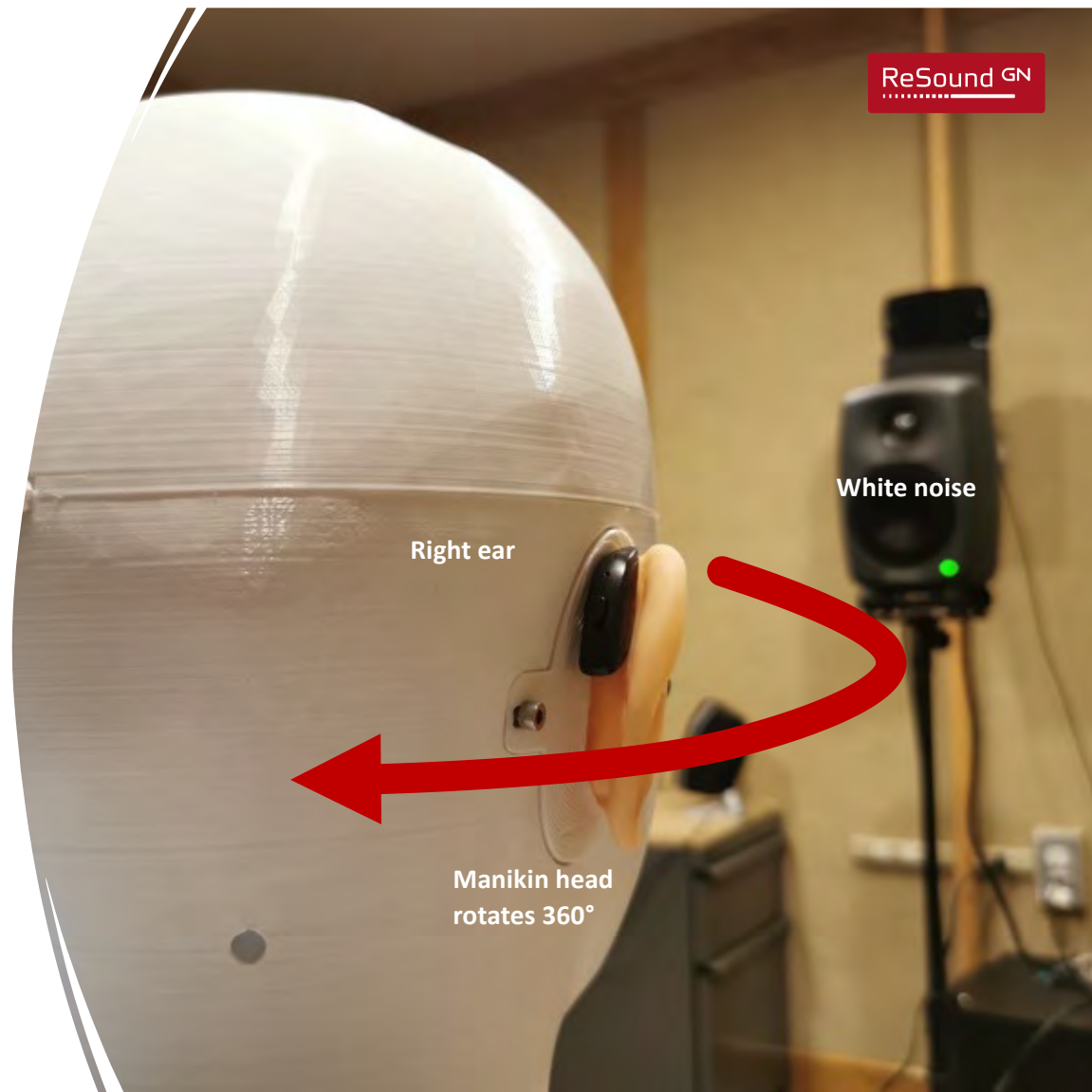
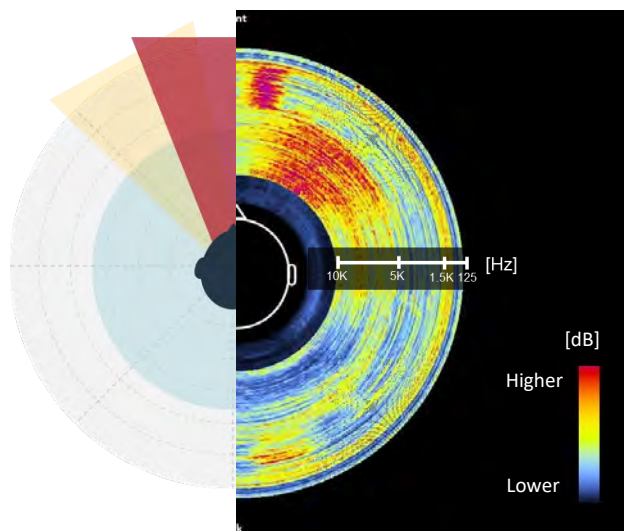
- The required signal-to-noise ratio (SNR) to understand the speech above the noise.

The result can be compared to those with normal hearing.

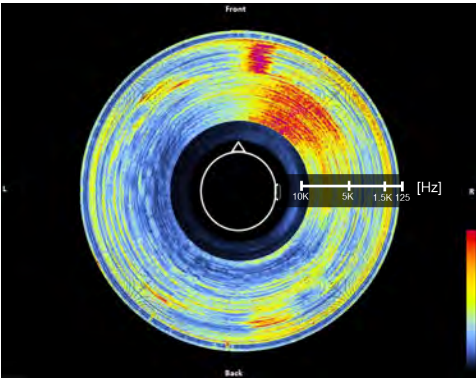
Interpreting the Score

QUICK SIN SCORE SNR LOSS	DEGREE OF LOSS	HOW TO USE IN FITTING A HEARING AID
Up to 2 dB	Normal	Rare for a H.A. User to Have this SNR Loss
3-7 dB	Mild	H.A. User Should Have Directional Microphones
8-15 dB	Moderate	H.A. User Should Have Directional Microphones – 2 mic systems won't help much Look for 4-mic beamformers
> 15 dB	Severe	Companion Mics and 4-mic beamformers

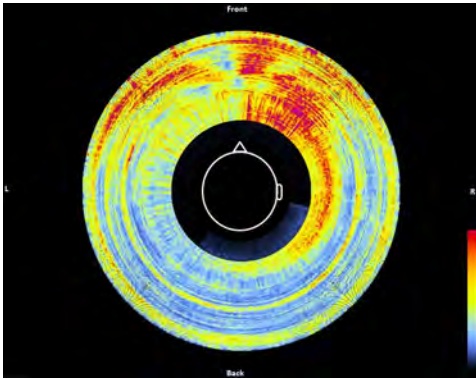
Measuring Directionality with Circular Spectrograms



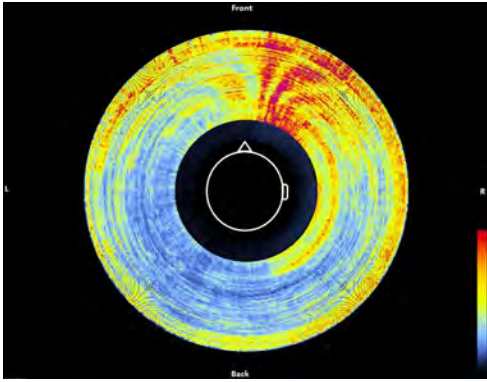
Comparisons to other premium brands



A

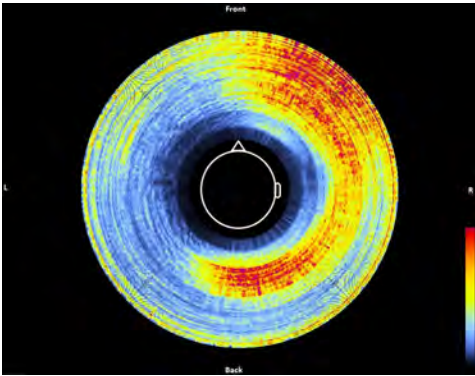


B

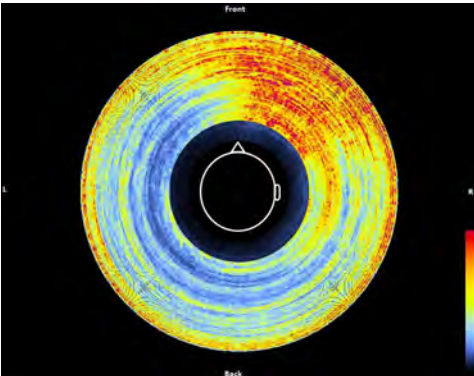


C

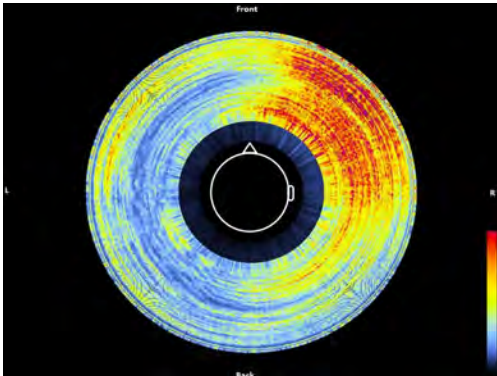
4 Microphone



D



E



F

2 Microphone



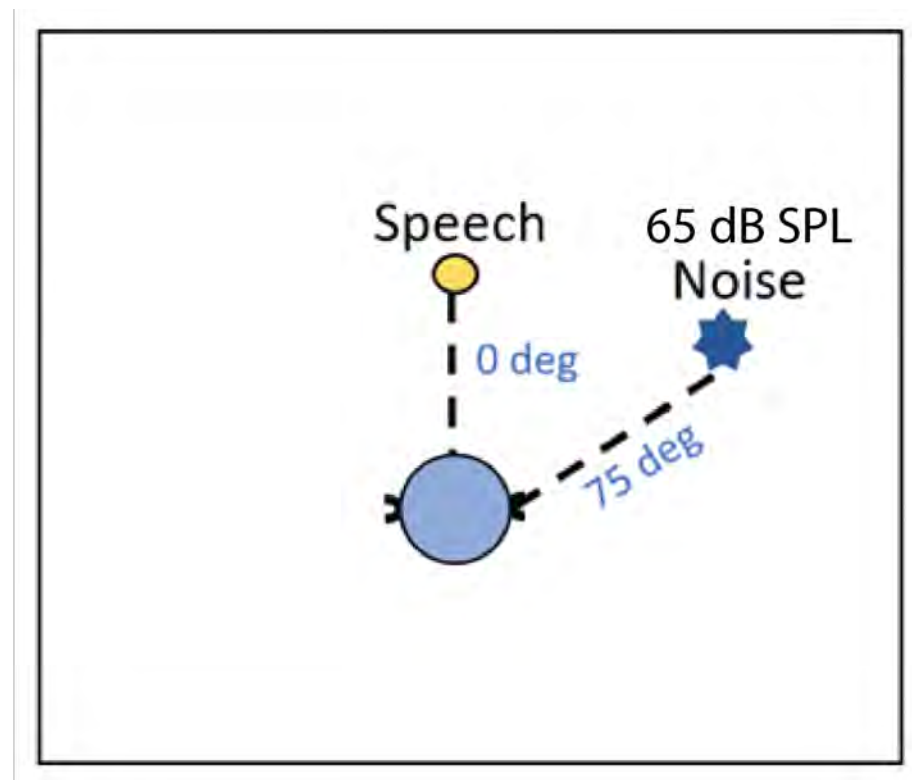
Methodology: Test setup

Test participants

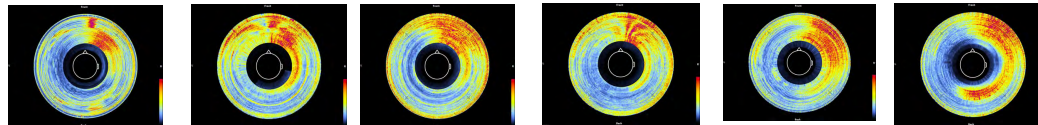
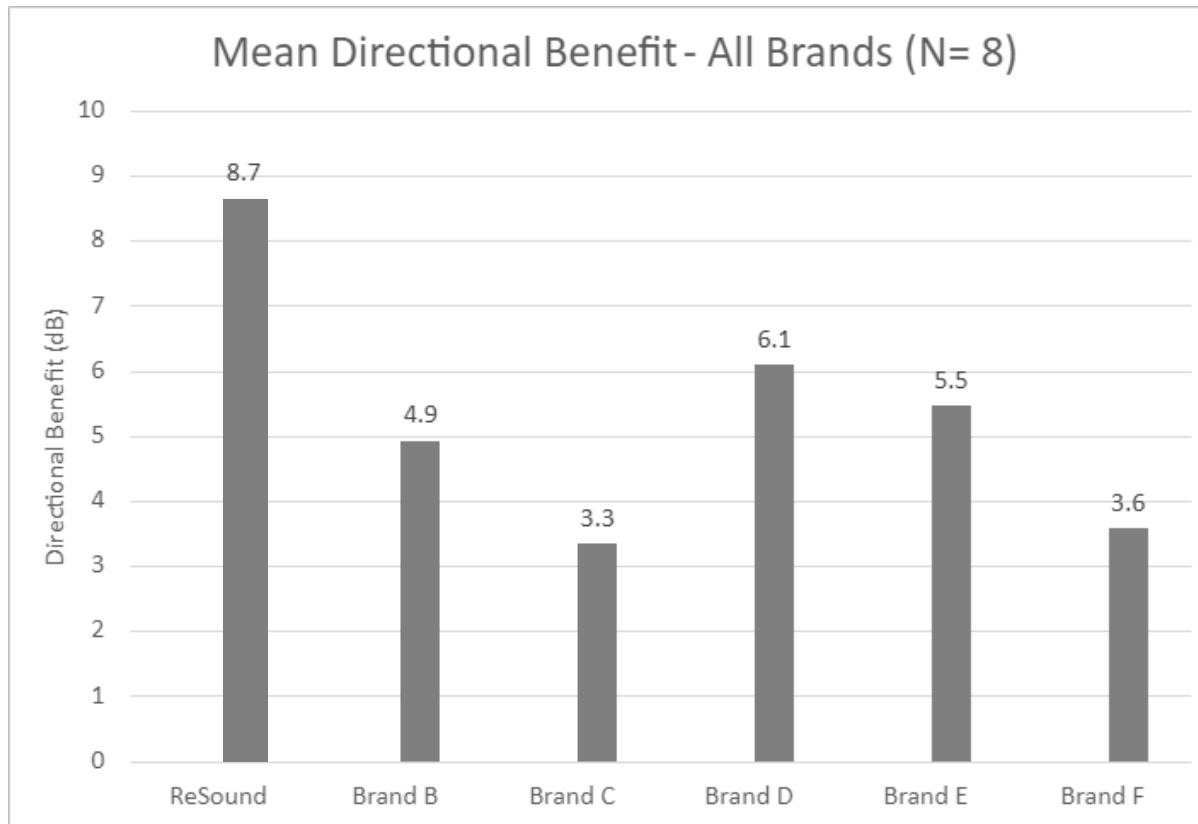
- 15 participants with sensorineural hearing loss
- Experienced hearing aid users

Hearing aids

- All top end hearing aids on the market today



Results



Solving the Noise Problem

Measure	Measure a patient's ability to hearing in noise
Know	Know that systems with 2 mic directionality will provide less benefit in noise
Understand	Understand the hearing aid's environmental classification system
Use	Use Accessories

CLOSING THOUGHTS:

What feature or service do hearing healthcare professionals request the most, that simply isn't possible to deliver at this time?

Laurel Christensen, Ph.D.
GN Hearing
Chief Audiology Officer

What feature or service do hearing healthcare professionals request the most, that simply isn't possible to deliver at this time?

DANA HELMINK, AU.D.

SR. DIRECTOR, AUDIOLOGICAL DEVELOPMENT



AUDIOLOGICAL IMPORTANCE OF DIRECTIONALITY



EVERY dB matters

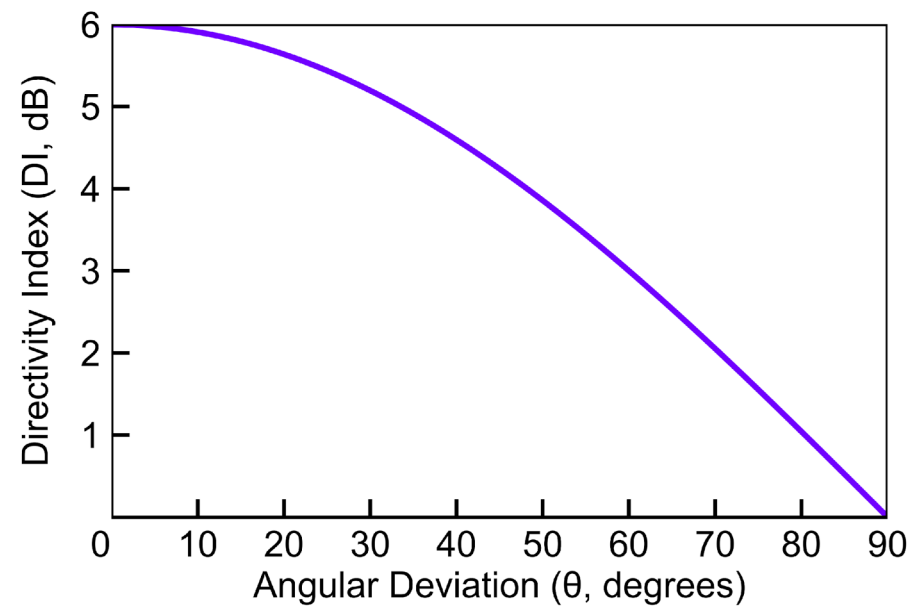
1dB SNR improvement = 10-12%
INCREASE in speech understanding

MICROPHONE ANGLE AND SPEECH-IN-NOISE PERFORMANCE

Q8



Traditional RIC



WIDEX SMARTRIC™
GROUNDBREAKING L-SHAPE
IMPROVED DIRECTIONALITY

SPEECH-IN-NOISE PERFORMANCE STUDY



Traditional RIC



SmartRIC

1. Comparing
microphone
angles

2. Comparing
SRT50 scores
using HINT

Kuk F, Slugocki C, Korhonen P, Peeters H. (2024). Forms influence functions: Importance of microphone angle and speech-in-noise performance. (Pending publication)

WIDEX SMARTRIC SPEECH-IN-NOISE PERFORMANCE STUDY



Results of an ORCA study show an **average 1.25 dB improvement in SNR**, which corresponds to a **12.5% improvement in speech understanding in noise**

Individual outcomes showed up to a 5 dB improvement in SNR

Kuk F, Slugocki C, Korhonen P, Peeters H. (2024). Forms influence functions: Importance of microphone angle and speech-in-noise performance. (Pending publication)



CLOSING THOUGHTS

WHAT FEATURE OR SERVICE DO HEARING HEALTHCARE PROFESSIONALS REQUEST THE MOST, THAT SIMPLY ISN'T POSSIBLE TO DELIVER AT THIS TIME?

DANA HELMINK, AU.D
SR. DIRECTOR, AUDIOLOGICAL DEVELOPMENT

Thank you!

2024 Industry Roundtable



Susan Scollie, PhD
Moderator



Jessica Lovell, VP
CareCredit



Brian Taylor, AuD
Signia



Steve DeMari, MS
CaptionCall



Jessica Dancis, MA
Sennheiser



Dave Fabry, PhD
Starkey



Hear better. Live better.



Laurel Christensen, PhD
ReSound



Dana Helmink, AuD
Widex



Natasha McDougald
Cochlear

