




# Facilitating the Journey to Hearing Aid Acquisition

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[www.hearing.org](http://www.hearing.org)



Amplifon USA  
Audina Hearing Instruments  
Audiology Online  
Beltone Electronics  
EarQ  
Energizer  
ESCO  
GN Hearing Care  
Hansaton  
Interton, U.S.  
IntriCon Corporation  
Knowles Electronics  
Micro-Tech Hearing Instruments  
ON Semiconductor

Oticon Inc.  
Panasonic  
Phonak Inc.  
Rayovac  
Rexton, Inc.  
Siemens Hearing Instruments  
Sonic Innovations, Inc.  
Sonion  
Starkey Hearing Technologies  
The Hearing Journal  
The Hearing Review  
Unitron Hearing US  
Widex

## HIA Programs

- Government Relations
- Statistics
- Market Development

## Government Relations

- Agencies – FDA, FCC, HHS, FTC
- Legislatures – House, Senate, States
- Allied Organizations

# Hearing Aid Tax Credit

## ***H.R. 1479***

- \$500 per aid
- Every five years
- Age 55 and older  
and dependent children
- Household income below  
\$200,000

## ***S. 905***

- \$500 per aid
- Every five years
- All ages
- No income cap

***[www.hearingaidtaxcredit.org](http://www.hearingaidtaxcredit.org)***

## Hearing Aid Tax Credit

- \$1000 financial assist
- \$12,000 annual income differential
- “Halo” effect

*[www.hearingaidtaxcredit.org](http://www.hearingaidtaxcredit.org)*

## Statistics

### 2010

- 2,686,952 units
- +2.8%
- 67% BTE

### 2011

- 2,772,079 units
- +1%
- 69% BTE

### 2012 (Q3)

- 2,148,719 units
- +3%
- 70% BTE – 50%  
External Receiver

## The Phenomenal Mini-BTE

- Increased from 20% to 70% of sales – 60% new users
- Working and earning \$15,000 more annually
- Male
- Less severe loss
- More satisfied – sound quality & cosmetics



# Market Development

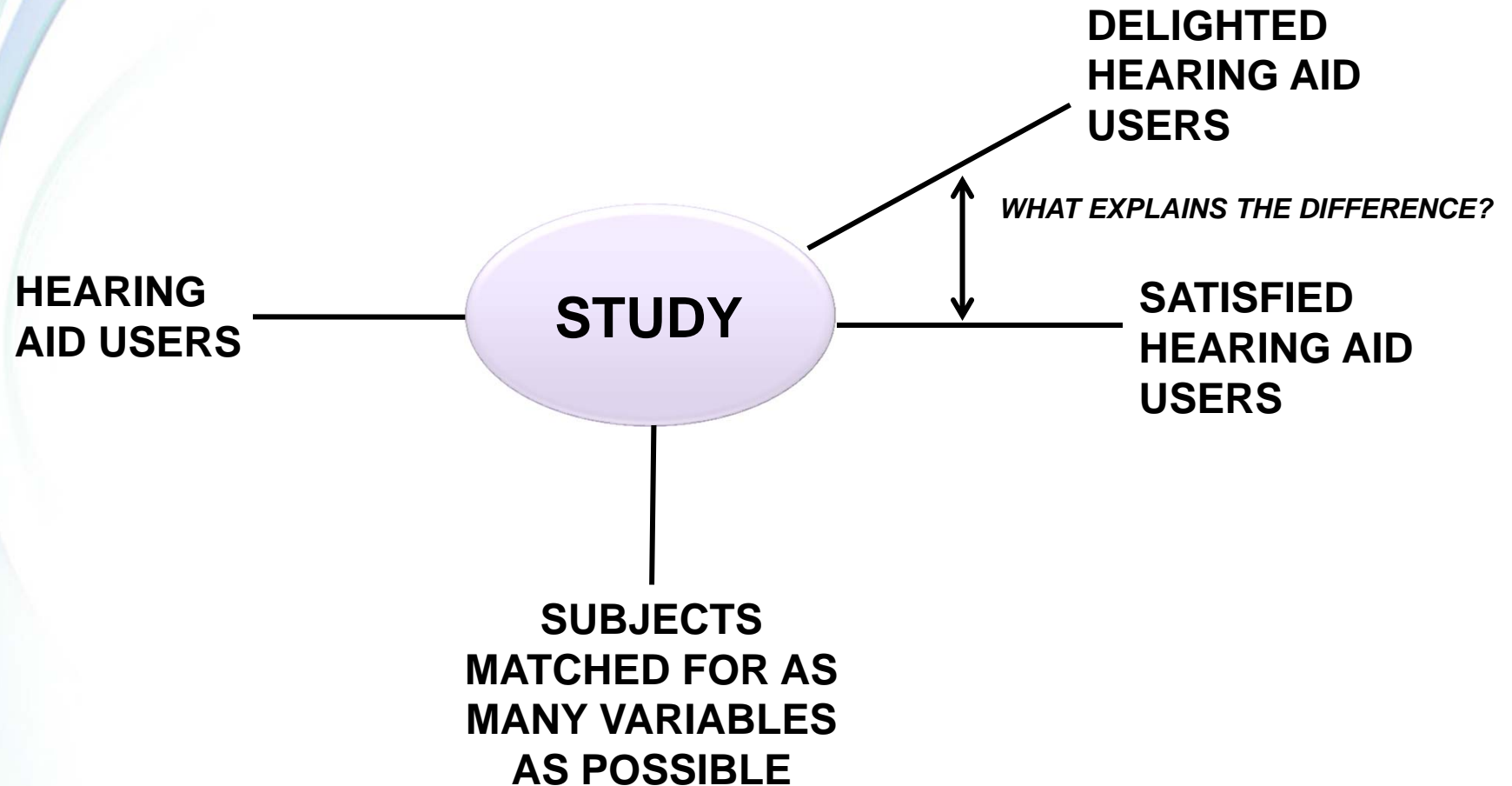
- Better Hearing Institute, [www.betterhearing.org](http://www.betterhearing.org)
- Exploring the Consumer's Journey
  - On-line Survey of Satisfied Users (2007)
  - Focus Groups and Personal Interviews (2012)

“Exploring the Consumer’s Journey”

## Rationale

- Technological excellence
- Dispensing excellence
- Gap between excellence and use
  - 20% Utilization
  - Public perception unchanged
  - 1 in 6 are in the drawer
- Results of untreated hearing loss cannot be tolerated any longer

## Research Method “Modified Matched-Pair”



## “Exploring the Consumer’s Journey”

# Results

### The Survey

- 95 questions about hearing aids, acquisition, use
- 41 minutes to complete
- Healthy Hearing/Survey Sampling International
- 10 point scale – “High Delight” = 9 or 10

### The Respondents

- 890 respondents (73% completion rate)
- 50% women, 50% men
- Average of 60 years
- Over 80% binaural
- Over 75% reported moderate-severe loss

## “Exploring the Consumer’s Journey”

# Results

### “Delight” was NOT impacted by:

- Duration of hearing aid use
- Style of hearing aids
- Type of dispensing professional
- Type of office
- Source of referral
- Source of payment
- Price structure
- Cost
- Marital Status
- Employment Status
- Type of employment
- Educational level
- Health Status
- Income level
- Hearing level

“Exploring the Consumer’s Journey”

## Results

### ‘Delighted users’

- Significantly female
- Significantly younger
- Live in home with 3+ people
- New hearing aids (87% purchased within 4 years, all within 5)
- Wear hearing aids full time (not on a situational basis)

## “Exploring the Consumer’s Journey”

# Results

“Delighted users” reported significantly better/higher on seven key aspects of acquisition:

- **Motivation** – 59% sought pre-appointment information, they expected age-related loss and had support of significant others
- **Professionalism** – Recommendations from others, website, appearance of Hearing Care Professional and office
- **Hearing Evaluation** – As long, technologically sophisticated and discussed as possible

## “Exploring the Consumer’s Journey”

# Results

### “Delighted users” ...

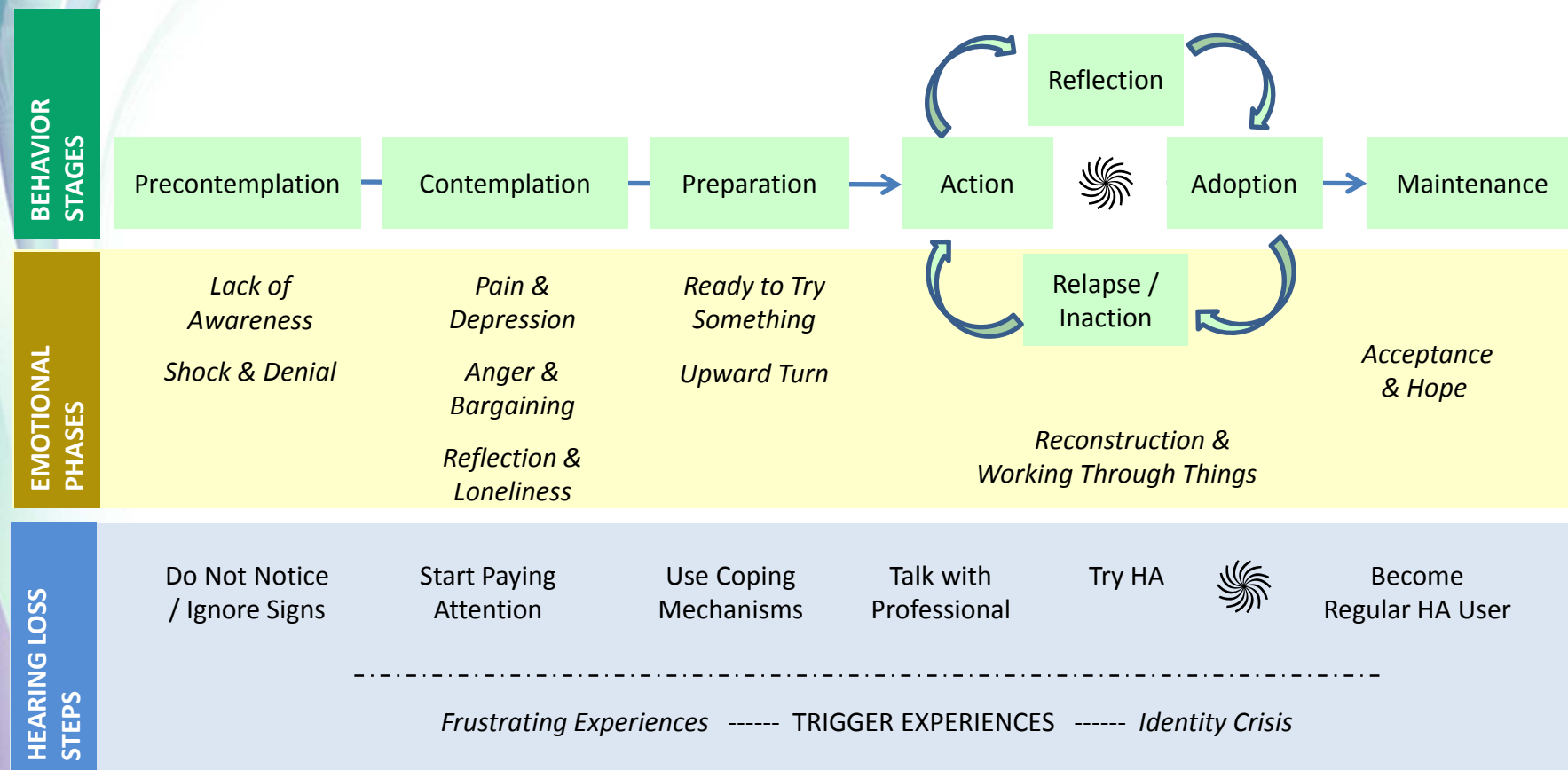
- **Recommendations** – For hearing aid use, type of devices, experimentation, and trial period
- **Hearing aids** – Work, sound quality, problems reduced or eliminated, return visits reduced from 4.6 to 2.8
- **Counseling** – Verification and validation, information verbally and in print, at least 4 hours of contact
- **Continued connection** with hearing care professional



# The Hearing Loss Model

This model couples the “stages of change” with the “emotions of grief” as they apply to hearing loss.

- People with hearing loss must be motivated to make a change on their own.
- It takes time to move through the phases, and individuals move at their own pace.
- Professionals need to meet individuals where ever they are on their journey.



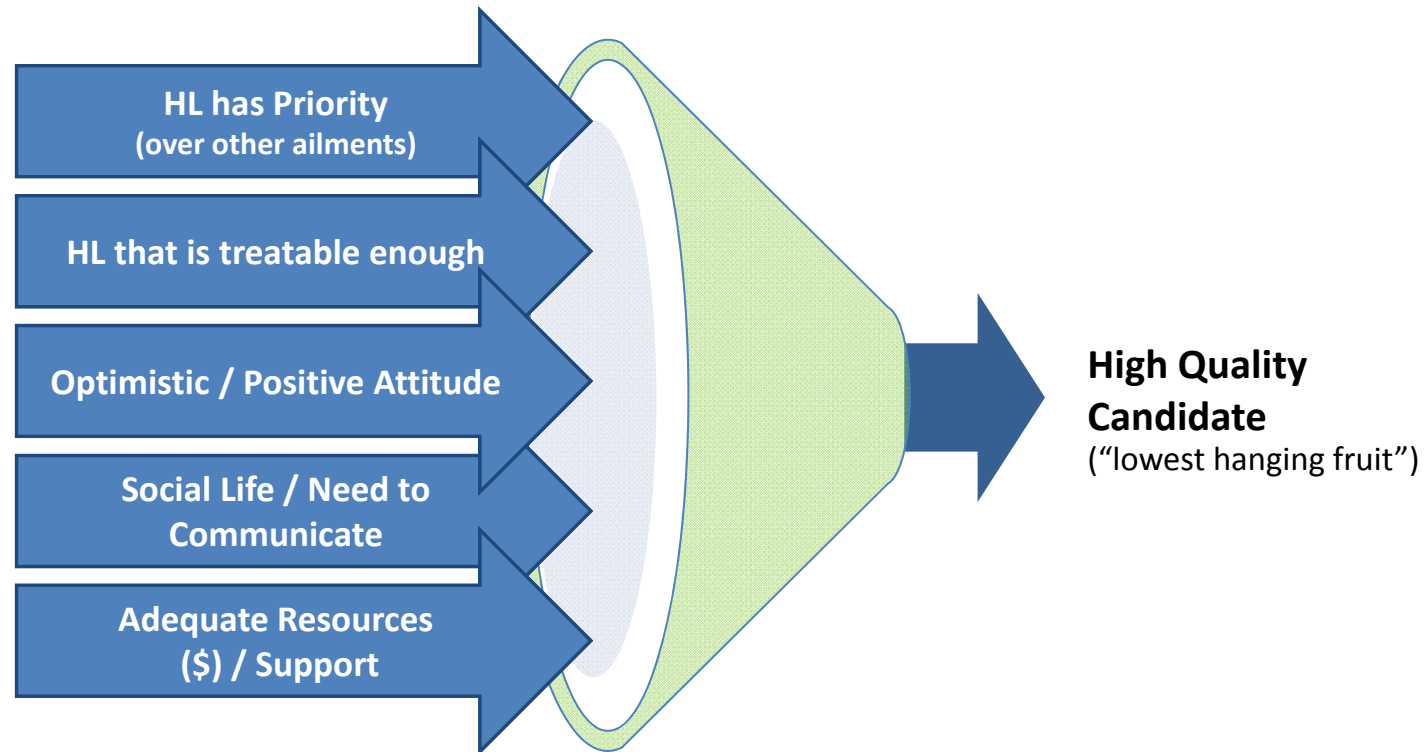
“The first step towards getting somewhere is to decide that you are not going to stay where you are.”

J. Pierpont Morgan (American financier, banker, philanthropist and art collector.)

“Exploring the Consumer’s Journey”

## Results

### Beyond Emotion and Change to Candidacy



## “Exploring the Consumer’s Journey”

# Results

### Initial Steps

- Hearing Loss Viewed as Medical Condition
- Hearing Care Professional Establishes the Expectations
- People feel “Sucked In”
- “Don’t See It” to “Want to Hear It”

“Exploring the Consumer’s Journey”

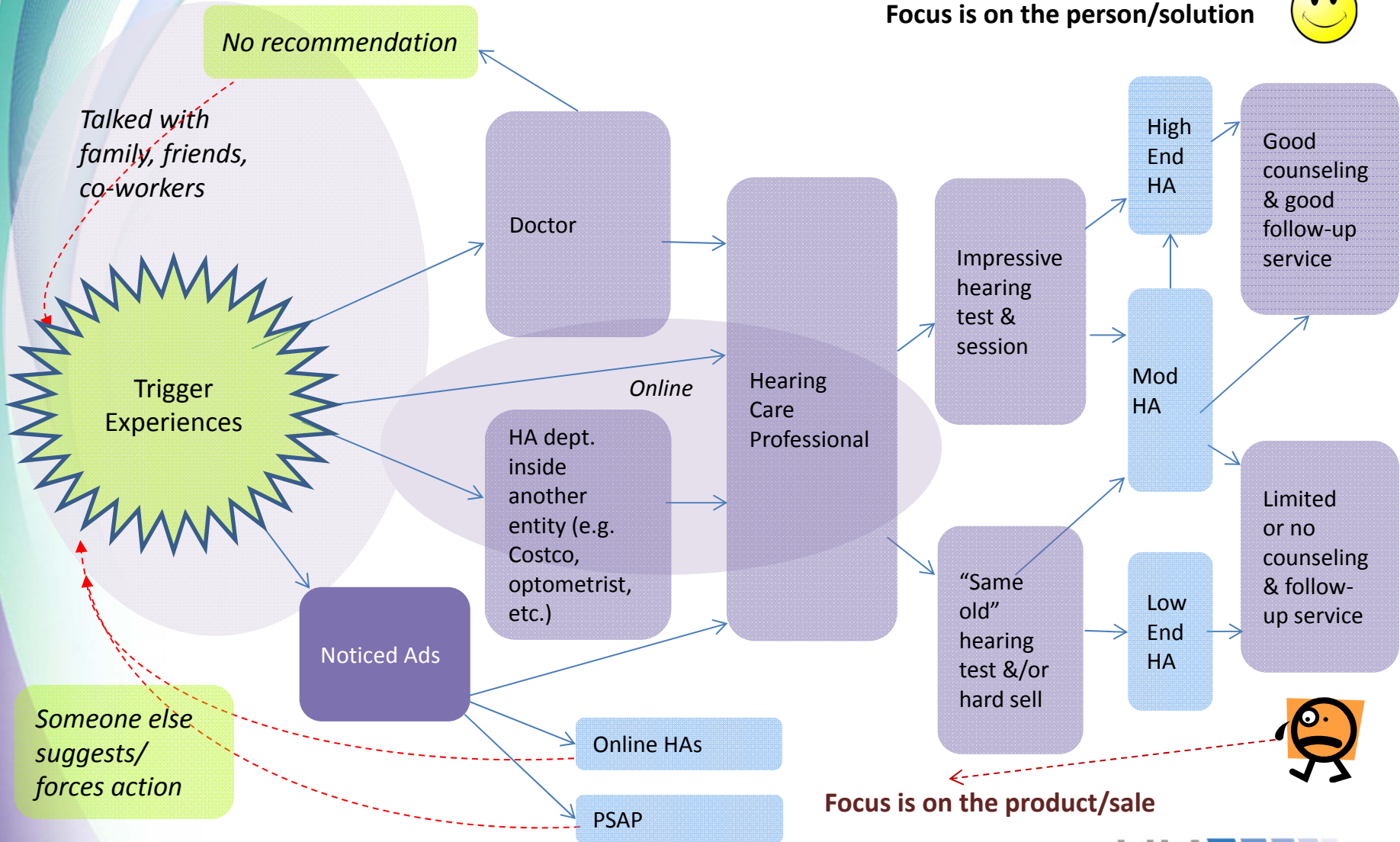
## Results

It’s a Journey and We Need to Meet Them Wherever They Are

- Hearing Loss Viewed as Medical Condition
- Recognize the Phase
- Respect the Pace
- Change the Awareness from “Hearing Aids Make Me Look Old” to “Hearing Loss Makes Me Look Old”

# The Map of the Active Patient Journey

Focus is on the person/solution 



“Exploring the Consumer’s Journey”

## Results

“If not us, who? If not now, when?”

- Position Hearing as a Medical Issue
- Engage in the Community
- Make It Easy for People to Take Baby Steps
- Maximize Learning and Listening Opportunities





Thank you!