



CEA's Consumer Research: Personal Sound Amplification Products

Institute of Medicine – Committee on Accessible and
Affordable Hearing Health Care for Adults Workshop

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Consumer Electronics Association®

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About CEA

- Represents the \$286 billion U.S. consumer electronics industry
- More than 2100 member companies
- Producer of CES - the Global Stage for Innovation
- Deep involvement in accessibility issues at the Consumer Electronics Show (CES), with its CEA Foundation, and before U.S. regulators



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CEA's Accessibility Work

Regulatory

- Implementation of the Communications and Video Accessibility Act of 2010
- CEA recently re-appointed to FCC's Consumer Advisory Committee and the newly-formed Disability Advisory Committee

Standards

- CEA created the standard for closed captions nearly 25 years ago
- Received Technology and Engineering Emmy Award from the National Academy of Television Arts and Sciences in 2005 for our work in digital and analog television closed captioning standardization
- CC standards have been revised 10 times since first published by CEA
- Partnering w/manufacturers, audiologists, researchers and other stakeholders to develop performance criteria and measurement protocols for PSAPs

CEA Foundation

- A way for the industry to give back and change lives
- Mission is to improve the lives of seniors & people with disabilities
- Recent grants include: Gallaudet University, American Foundation for the Blind, BridgingApps, Lighthouse Guild



Personal Sound Amplification Products (PSAPs)

PSAPs are over-the-counter electronic products that enable users to amplify sounds in order to hear better.



CEA's interest:

To increase the availability of personal sound amplification products (PSAPs) alongside hearing aids in order to give people with mild hearing loss more options and increased quality-of-life.

PSAP Study Objectives

- Determine current ownership and use of PSAPs across a variety of situations and environments
- Understand the portfolio of products consumers use for sound amplification (including both hearing aids and PSAPs)
- Establish consumer interest in using PSAPs across a variety of situations and environments
- Understand channels for exposure and purchasing of PSAPs

Why Study PSAPs?

- Almost **half (46%)** of online U.S. adults have some level of hearing loss
- There are two main options to assist: hearing aids and PSAPs
 - Hearing aids can be prohibitively expensive (\$1,000 to \$6,000 plus medical appointments)
 - PSAPs offer a lower barrier to entry (\$100 to \$600 per device)
- FDA's 2009 Guidance distinguished between hearing aids and PSAPs for regulatory purposes
 - But FDA's pending 2013 Guidance makes it difficult to market PSAPs to manufacturers' target audience
- CEA has urged the FDA to clarify its guidance



The Study

- CEA has a robust market research function
- Study administered via Internet web form between June 3 to June 10, 2014 to an online national sample of 3,459 adults (age 18 and over)
- Report focuses on the 1,551 U.S. adults (age 18 and over) with diagnosed hearing loss or at least a little trouble hearing
- Online format (to facilitate accessibility)
- Designed in partnership with hearing loss professionals



Key Conclusions

- Cost is a major barrier to consumers seeking help for hearing difficulty
 - Many are unwilling to pay the entry price of \$1,000 for hearing aids

Figure 5 – Amount Willing to Spend on Hearing Health Care or Devices

	Diagnosed w/ Hearing Loss (A)	A Lot/Some Hearing Difficulty (B)	A Little Hearing Difficulty (C)
\$0	21%	22%	43% AB
\$1–\$99	8%	18% A	14% A
\$100–\$299	16%	28% A	26% A
\$300–\$499	6% C	4%	3%
\$500–\$999	17% C	18% C	7%
\$1,000–\$2,499	16% C	10%	7%
\$2,500–\$4,999	12% BC	0%	1%
\$5,000+	4% BC	0%	0%
Average	\$925 BC	\$265	\$211
Don't know	48%	49%	50%

Percentages based on those that provided a dollar amount (i.e., did not answer "don't know")

Base: Online U.S. adults. (n= 362) | Diagnosed with hearing loss; (n= 248) | With a lot/some trouble hearing; (n=941) | With a little trouble hearing

Letter denotes significantly higher percentage compared to other group

Q6. How much would you be willing to spend on hearing health care or devices that help you hear better in the next 12 months?

Additionally...

Key Conclusions

Figure 10 - Reasons for Not Owning a Hearing Aid

	Diagnosed w/ Hearing Loss (A)	A Lot/Some Hearing Difficulty (B)	A Little Hearing Difficulty (C)
Not concerned enough about hearing difficulties to purchase a hearing aid	33%	45% A	71% AB
Cost of medical devices associated with hearing difficulties	31% C	35% C	12%
Not covered by medical insurance or Medicare	23% BC	13% C	5%
I don't want to be bothered with hearing aids	15% C	17% C	8%
I don't care for the look of hearing aids	11%	12%	7%
I think hearing aids don't work well	7%	5%	3%
Cost of medical appointments	6%	21% AC	9%
Unaware of hearing aid option	5%	10% C	4%
Other	24% BC	13%	16%

Base: Online U.S. adults who do not own a hearing aid and (n=229) | Have been diagnosed with hearing loss; (n=215) | Have a lot/some trouble hearing; (n=864) | Have a little trouble hearing

Letter denotes significantly higher percentage compared to other group

Q9. You indicated you do not own a hearing aid. Which of the following, if any, are reasons you do not own a hearing aid?

Key Conclusions

- Yet, there is a demand for PSAPs among consumers with trouble hearing
 - Nearly 40% would be interested in an over-the-counter product
- Retailers are the preferred (73%) purchase channel for non-prescription hearing devices
 - Additionally, most (84%) consumers with trouble hearing would consult a medical or hearing professional about their hearing loss

Key Conclusions

- Most use PSAPs for listening to TV, but there is strong interest in using them for a wider range of activities
 - 41% report willingness to use PSAPs every day, in *any* listening situation.
- Consumers with hearing difficulty support the ability to purchase PSAPs in the same way they purchase reading glasses

Other Findings

- Reasons for **not** seeking medical care for hearing difficulties
 - 52% with a lot of trouble hearing say that hearing difficulties are not bad enough to do anything about it
 - 34% with a lot of trouble hearing cite costs, and 29% also cite separate cost of doctor's appointments
 - 21% with a lot of trouble hearing say they're not sure what options are available
 - Other reasons include not wanting to wear a hearing aid; social stigma; and they don't think the hearing aid will work
- Most (68%) of those with only a little trouble hearing are **not** planning to address their hearing issues in the future.
 - Ironically, those *already* using a hearing device of any kind are most likely to seek further help for their hearing loss

Contact

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Thank you!



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