

22 August 2023

ASHA OTC Hearing Aid Survey

YouGov®

Full Report

“Embargoed Until September 12, 2023, 6 a.m. EST.”



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Objectives & Methodology

Research Objectives:

The survey aims to gather perceptions surrounding OTC hearing aids amongst American adults aged 40+, including those with hearing difficulties or having loved ones with hearing difficulties.

Research objectives include determining...

- Awareness & familiarity of OTC hearing aids
- Perceptions of and beliefs about OTC hearing aids
- Among those with hearing difficulties or with loved ones with hearing difficulties:
 - Past purchase or future intent to purchase
 - Triggers and barriers to purchase
 - Purchase locations
 - Impact of seeking professional help on purchase
 - Satisfaction among purchasers
 - Cost
- Cost estimation

Methodology:

Method: 10-min online survey

Sample size: n=2,228

Fieldwork: June 27th to July 7th, 2023

Qualifying Criteria:

- Nat Rep Adults 40+
- Primary Market: USA
- Subgroups:
 - Have hearing difficulties (n=1,253)
 - Have a loved one with hearing difficulties and influence over healthcare decisions (n=177)
 - OTC hearing aid purchasers (for self or loved one) (n=37)*
 - OTC hearing aid intenders (for self or loved one) (n=241)
- Applicable results are compared to a study conducted by YouGov on behalf of ASHA in September of 2021, prior to the FDA approving OTC hearing aids.

Executive Summary

Hearing Health

- More than half of American adults 40+, 56%, acknowledge lacking excellent hearing abilities, and just 8% having been treated.
- Almost half of American adults with hearing difficulties let their symptoms persist untreated for over 2 years. Moreover, for those with a loved one experiencing hearing loss symptoms, only about 1-in-5 sought medical help.
- The primary reason for not seeking professional help is not thinking it is “bad enough” to warrant care, followed by it not being a priority and cost.
- Nearly one-in-three indicate their quality of life has been negatively impacted by their hearing difficulties; 6-in-10 indicate the same for their family member. No significant differences are observed from 2021.
- More education is needed for all audiences around the need for rehab services and the effectiveness of hearing aids for all hearing problems.

OTC Hearing Aid Awareness & Usage

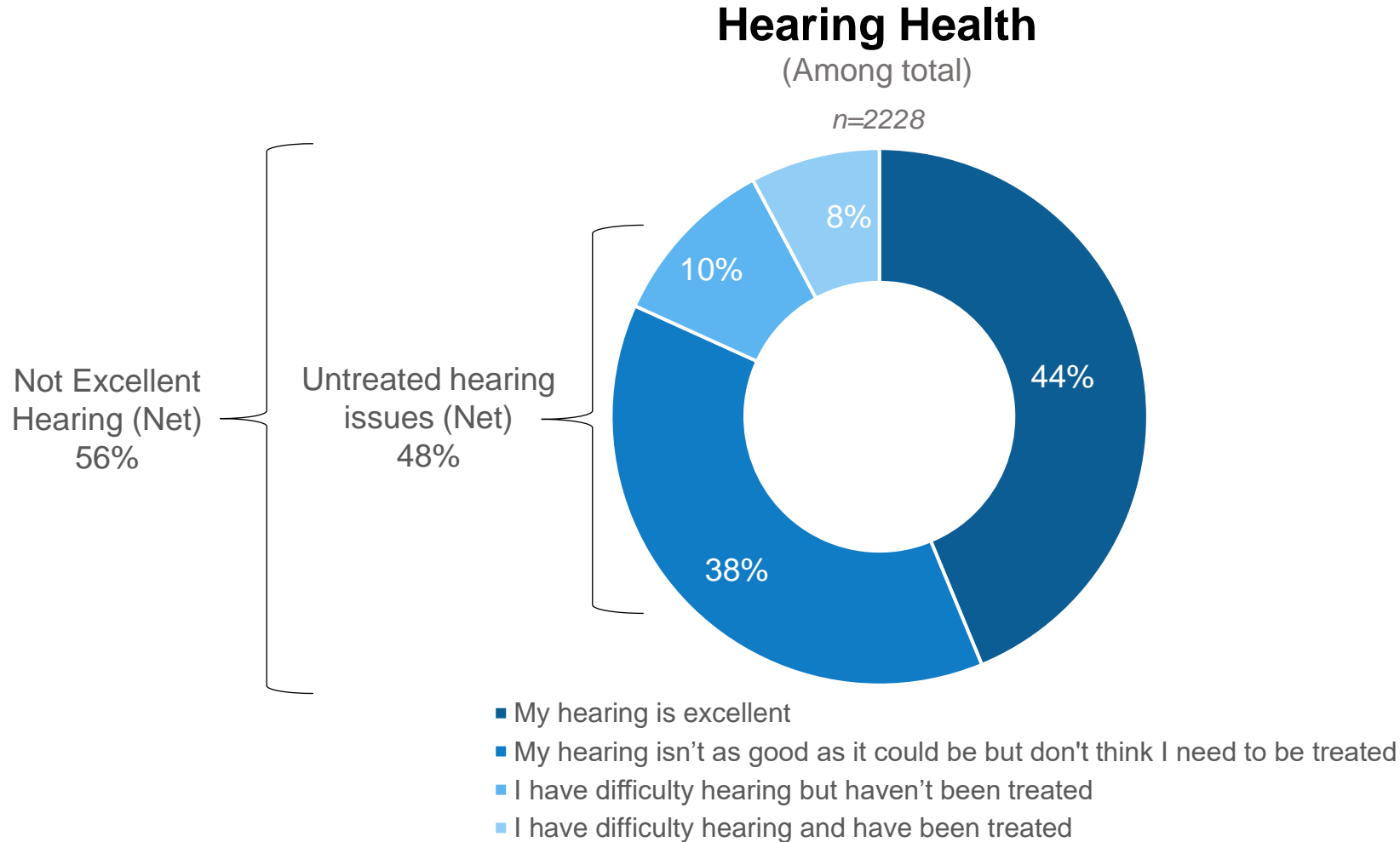
- Since the last study conducted in 2021, awareness of OTC hearing aids has increased.
- While misperceptions about OTC hearing aids still abound, progress is seen in communicating that OTC hearing aids are meant only for people with mild to moderate hearing loss.
- About 4-in-10 American adults perceive sound amplifiers and OTC hearing aids to be different, similar among all groups.
- Given recency of release, few have purchased an OTC hearing aid – just 2% of those with hearing difficulties.
 - Nearly half of purchasers reported being highly satisfied with their OTC hearing aids.
- Likelihood to purchase OTC hearing aids is similarly low, with just 4% of those with hearing difficulties stating an intent to purchase.
- Low likelihood to purchase is likely driven by a number of things, but one is a lack of confidence that a device could address the issue, and that people could choose the correct device themselves.

Satisfaction, Triggers and Barriers

- Factors that drive people towards OTC hearing aids are perceived cost effectiveness and availability without prescription.
- However, 7-in-10 purchasers do think it is important to receive professional guidance before purchasing an OTC hearing aid – commonly from physicians who specialize in hearing issues, audiologists and PCPs.
- Cost was the primary deterrent in not wanting to seek professional guidance prior to purchasing an OTC hearing aid.
- Buyers paid about \$233 on average for their OTC hearing aids, while intenders estimate they would spend about \$200.
- The estimated average cost for OTC hearing aids is approximately \$240. Perceptions that they are available for less than \$50 have increased since 2021.
- OTC hearing aids are purchased both online and in store, though intenders are more likely to say they will purchase in store.

Hearing Health

More than half of American adults, 56%, acknowledge lacking excellent hearing abilities, but just 8% have been treated.



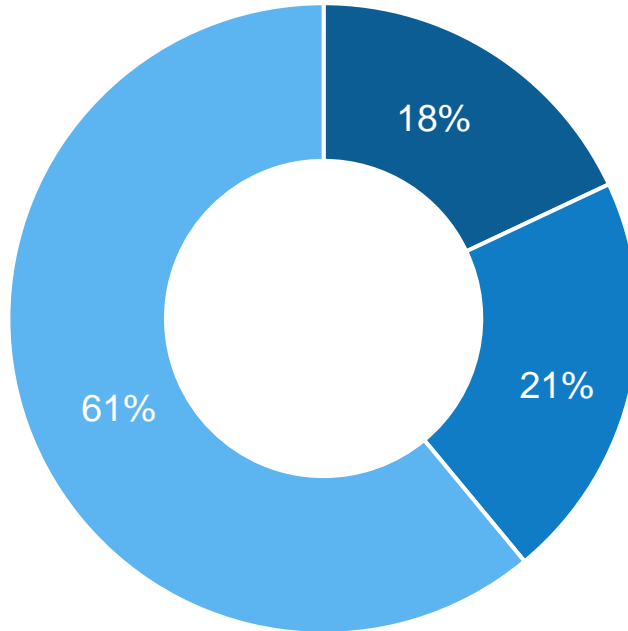
↑/↓ arrow denotes significantly higher/lower than 2021 survey at 95% CL

Among those who have excellent hearing themselves, just under 2-in-10 have a loved one with hearing difficulties, and influence over their healthcare decisions.

Loved One with Hearing Difficulties

(Among those with excellent hearing)

n=975



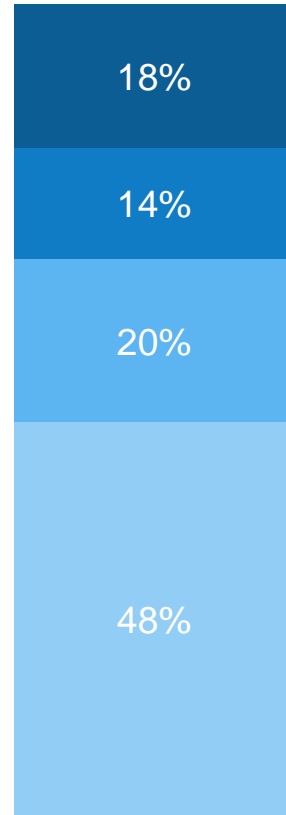
- Yes and I have influence on their healthcare decisions
- Yes, and I do not have influence on their healthcare decisions
- No, I do not

Almost half of American adults with hearing difficulties let their symptoms persist untreated for over 2 years. Moreover, for those with a loved one experiencing hearing loss symptoms, only about 1-in-5 sought medical help.

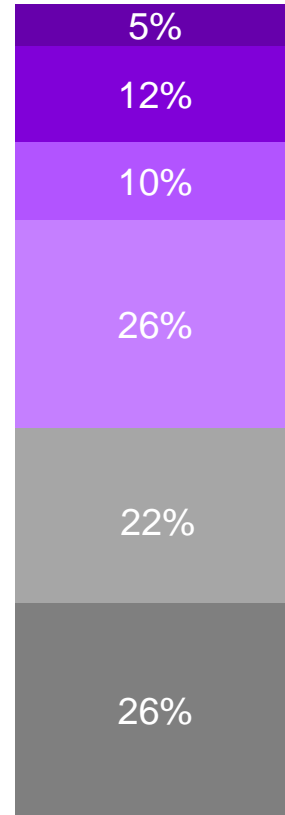
Duration of Hearing Loss Symptoms

(Among those with untreated hearing loss or influence over family member with hearing difficulty)

- Less than 6 months
- 6 months to a year
- 1-2 years
- More than two years
- They have sought medical help
- Not sure



Those with Hearing Difficulties
n=1079



Those with a Loved One with Hearing Difficulties
n=177

New question for this year hence no sig test

The primary reason for not seeking professional help is not thinking it is “bad enough” to warrant care, followed by it not being a priority and cost.

Reason for Not Seeking Professional Help

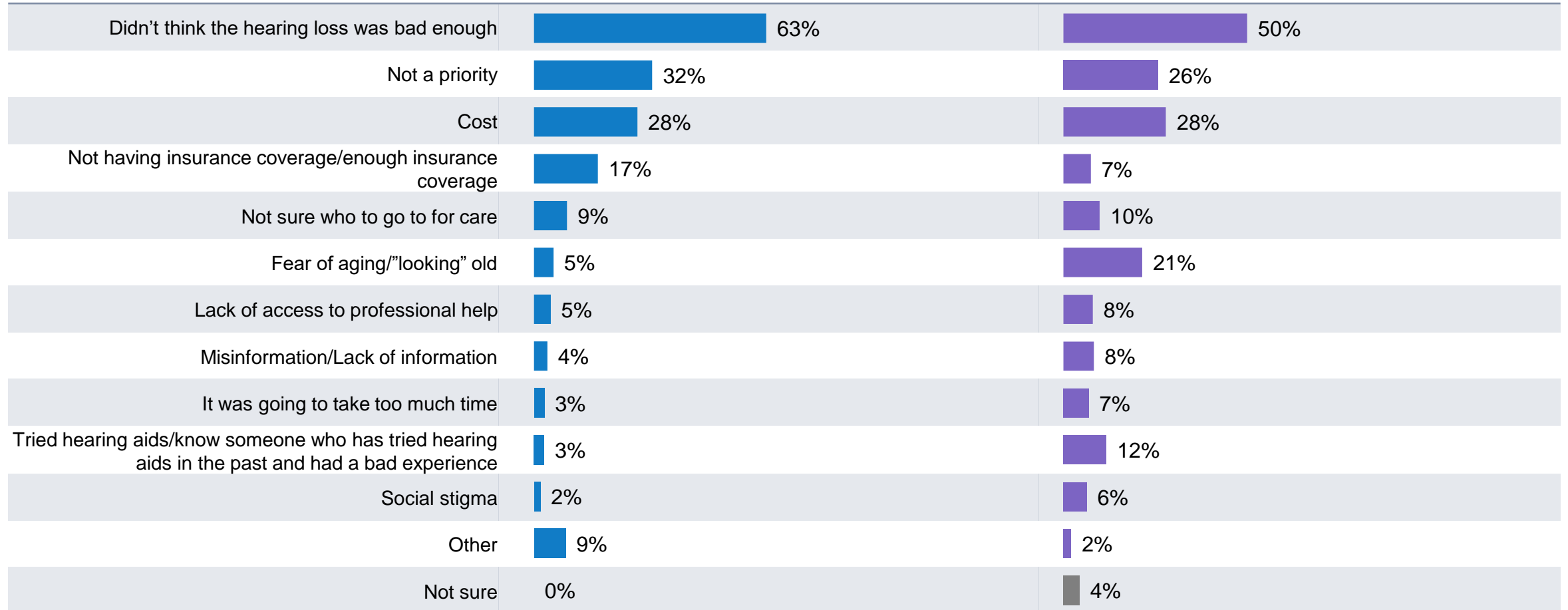
(Among those with untreated hearing loss)

Those with Hearing Difficulties

n=1079

Those with a Loved One with Hearing Difficulties

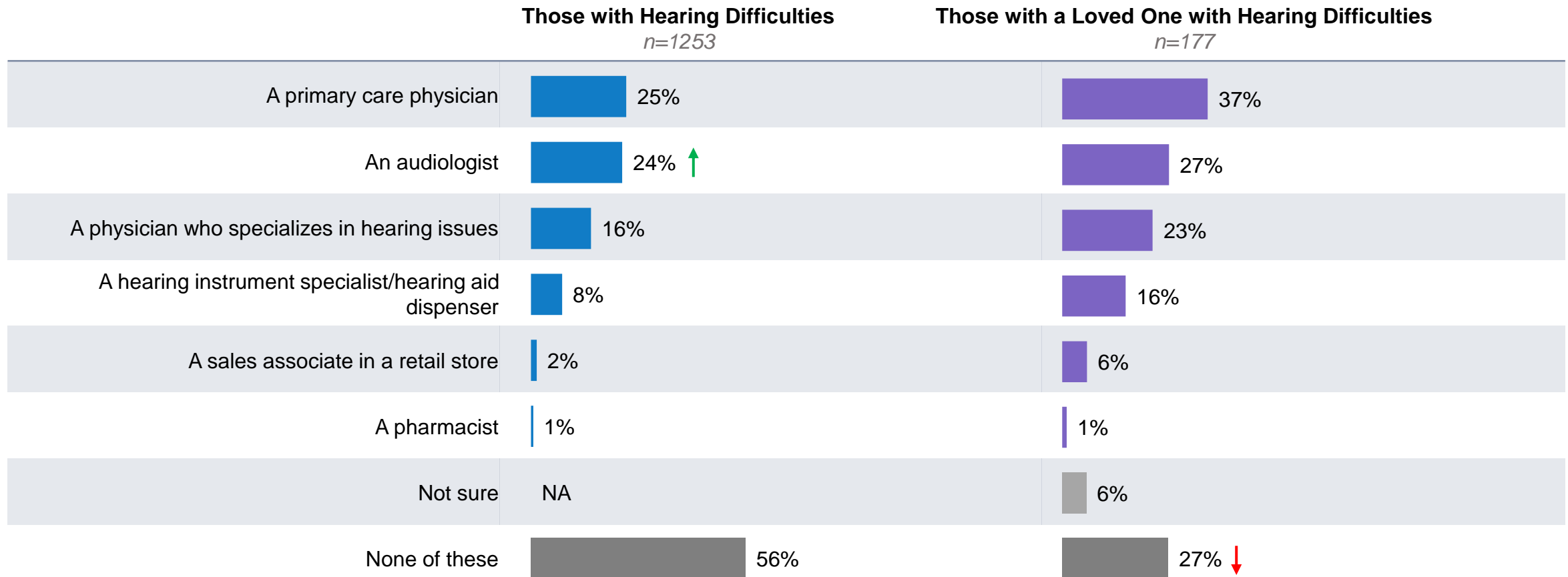
n=99



As we've seen previously, PCPs and audiologists are most often consulted. Audiologist ticks up this wave for self, while there is a notable decrease in not seeking specialized assistance among those answering about a loved one.

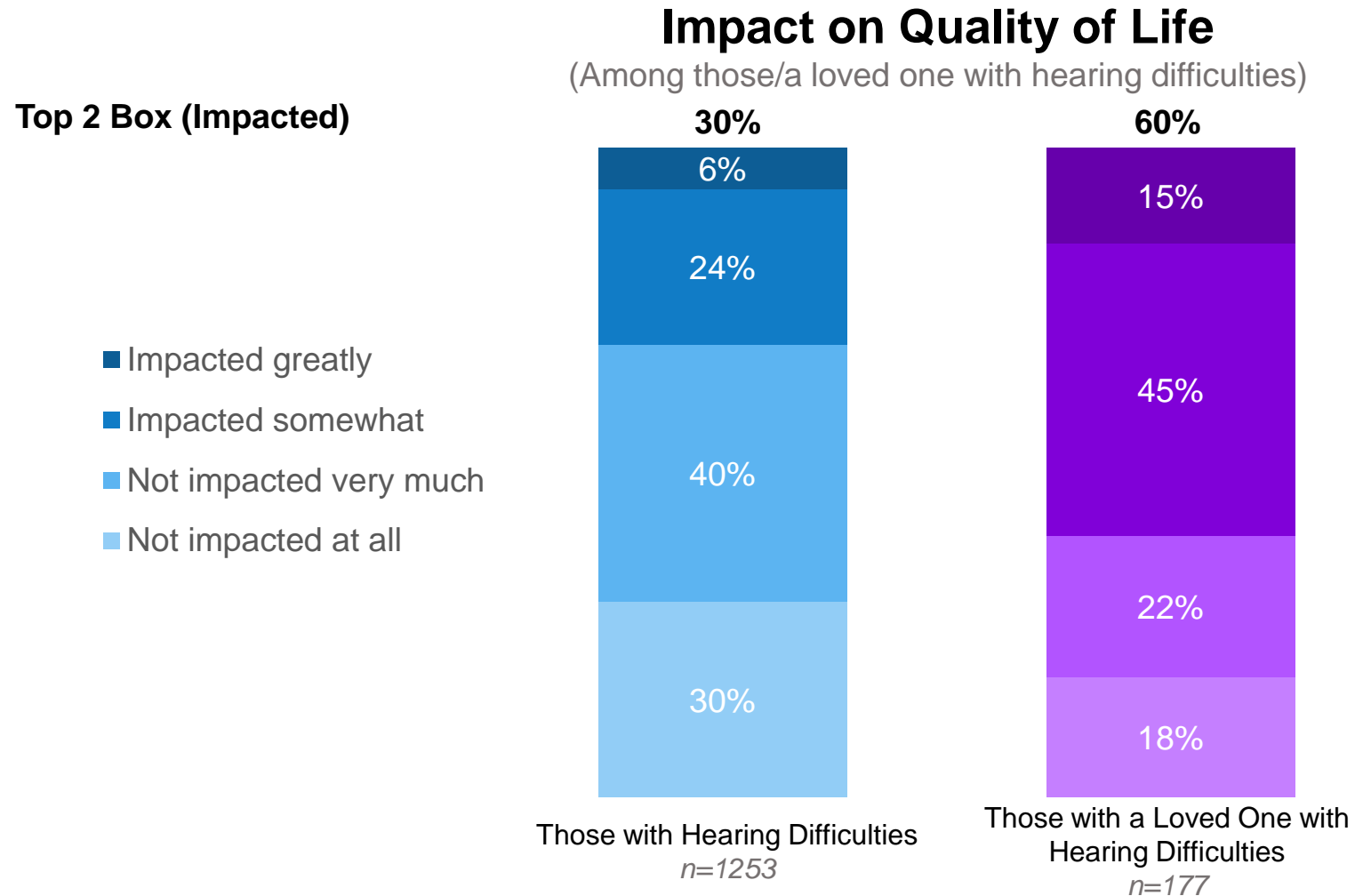
People Discussed Hearing Difficulty With

(Among those/a loved one with hearing difficulties)



**Pharmacist was introduced as an option in the current wave
 ↑/↓ arrow denotes significantly higher/lower than 2021 survey at 95% CL

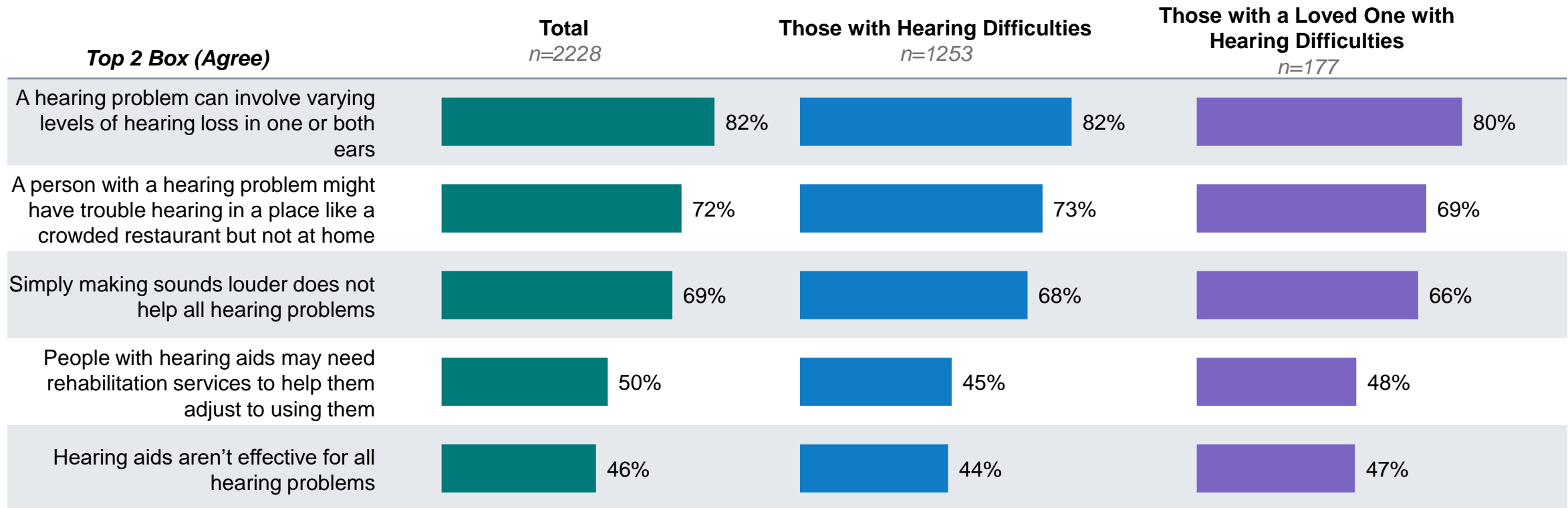
Nearly one-in-three indicate their quality of life has been negatively impacted by their hearing difficulties; 6-in-10 indicate the same for their family member. No significant differences are observed from 2021.



More education is needed for all audiences around the need for rehab services and the effectiveness of hearing aids for all hearing problems.

Agreement With Hearing Attitudes

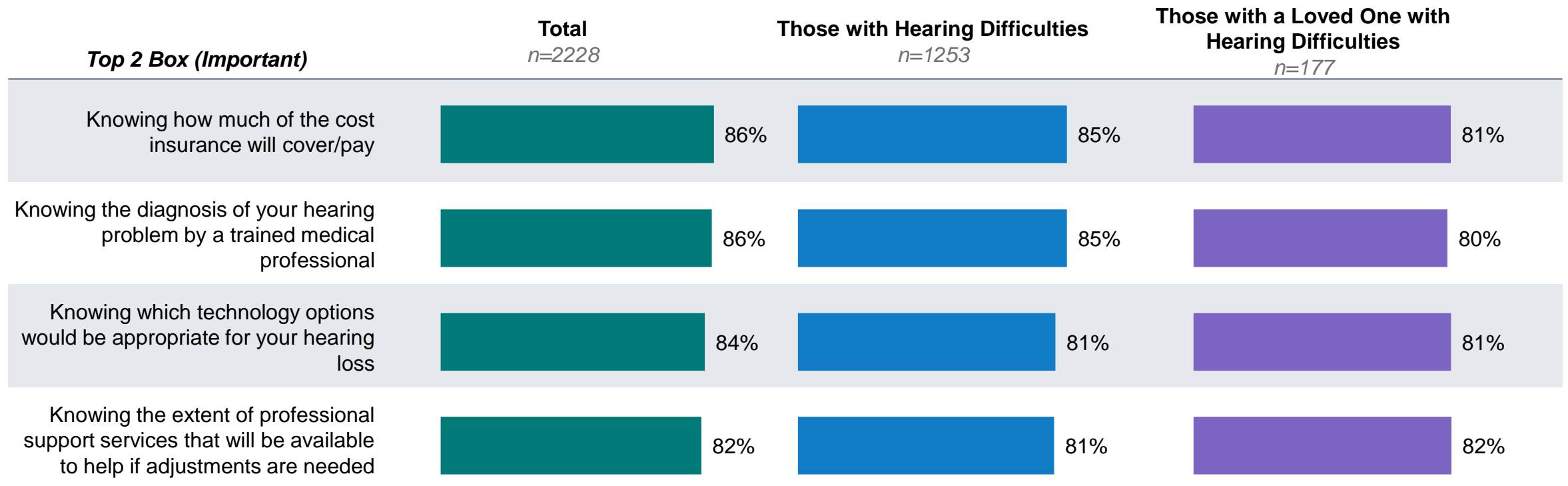
(Among total)



All factors investigated are highly important to know prior to purchasing a hearing aid. No significant differences are observed from 2021.

Importance of Factors Prior To Hearing Aid Purchase

(Among total)



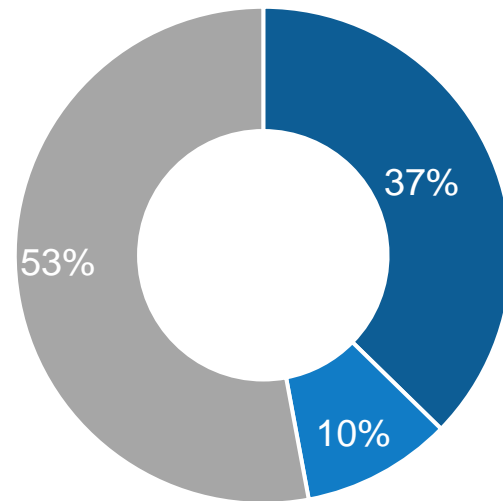
Nearly half of those who have spoken with an audiologist have been prescribed a hearing aid, and most use it. For those answering for a loved one, nearly three-quarters have been prescribed a hearing aid, and most use it.

Traditional Hearing Aid Prescription/Usage

(Among those who have discussed hearing difficulty with audiologist)

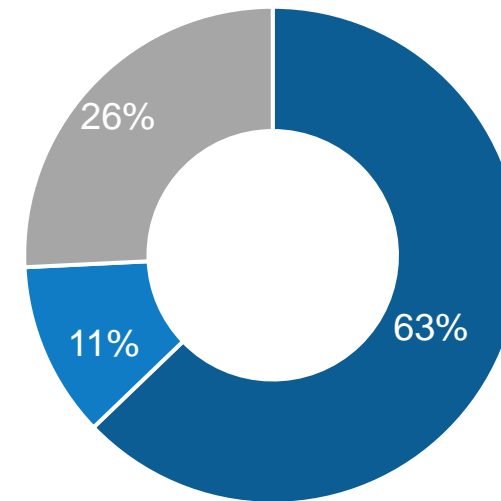
Those with Hearing Difficulties

n=298



Those with a Loved One with Hearing Difficulties

n=55



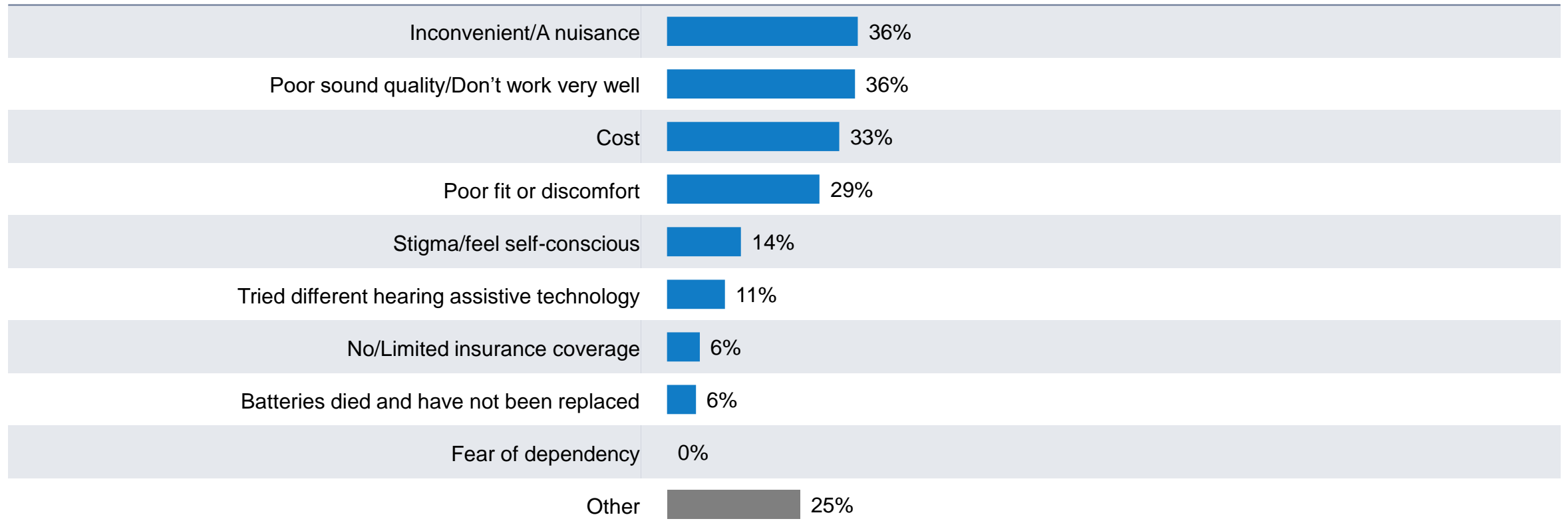
- Yes, have been prescribed a traditional hearing aid and use it
- Yes, have been prescribed a traditional hearing aid but don't use it
- No, have not been prescribed a traditional hearing aid

A small portion of American adults or adults with loved ones facing hearing issues chose not to use prescribed traditional hearing aids, most commonly due to inconvenience, poor sound, cost and poor fit/discomfort.

Reasons for Not Using Traditional Hearing Aid

(Among those who prescribed traditional hearing aid and do not use)

*n=36**



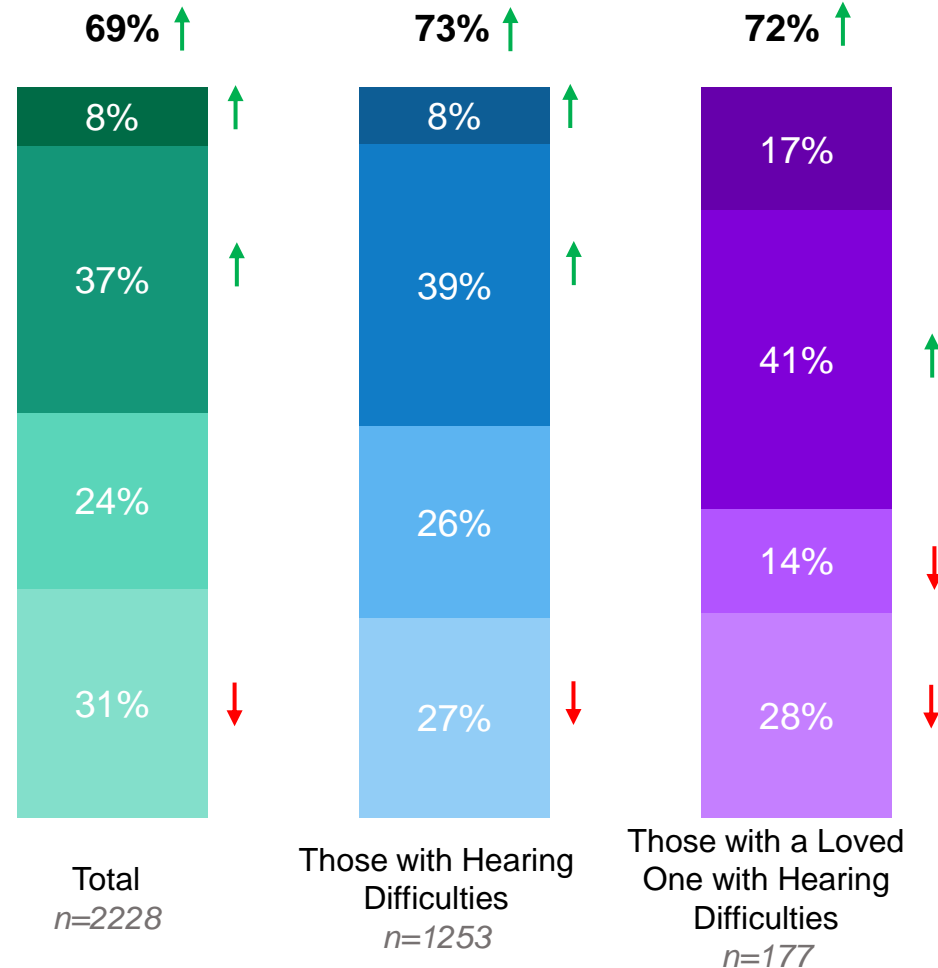
▶ OTC Hearing Aid Awareness & Usage

Awareness of OTC hearing aids has increased since 2021 across all groups.

Awareness of OTC Hearing Aids (Among total)

Net: Aware

- have heard a great deal about them
- I have heard a little bit about them
- I have not heard very much about them
- I have not heard anything about them at all



↑/↓ arrow denotes significantly higher/lower than 2021 survey at 95% CL

While misperceptions about OTC hearing aids still abound, progress is seen in communicating that OTC hearing aids are meant only for people with mild to moderate hearing loss.

OTC True/False Statements

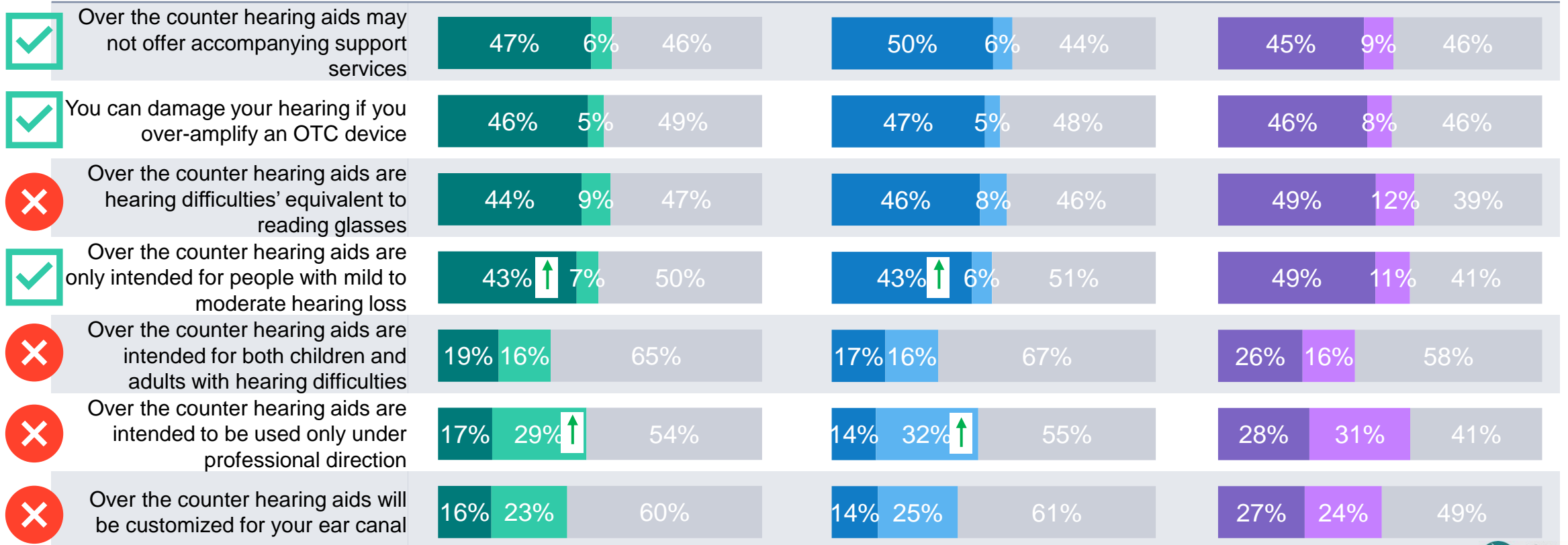
(Among total)

Total
n=2228

Those with Hearing Difficulties
n=1253

Those with a Loved One with Hearing Difficulties
n=177

■ TRUE ■ FALSE ■ Don't know/Not sure ■ TRUE ■ FALSE ■ Don't know/Not sure ■ TRUE ■ FALSE ■ Don't know/Not sure



↑/↓ arrow denotes significantly higher/lower than 2021 survey at 95% CL

About 4-in-10 American adults perceive sound amplifiers and OTC hearing aids to be different, similar among all groups.

Familiarity With OTC Hearing Aid & Sound Amplifier Differences

(Among total)

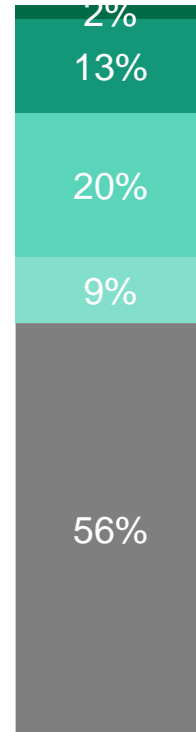
Net: Think there are differences

42%

43%

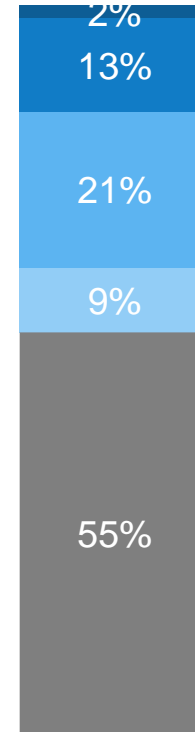
50%

- I don't think there are any differences
- I think there are a few differences but not many
- I think there are a lot of differences
- I think they are completely different
- Not sure



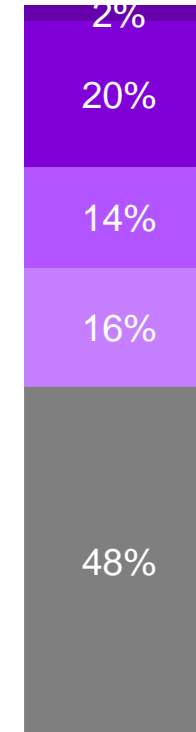
Total

n=2228



Those with Hearing Difficulties

n=1253



Those with a Loved One with Hearing Difficulties

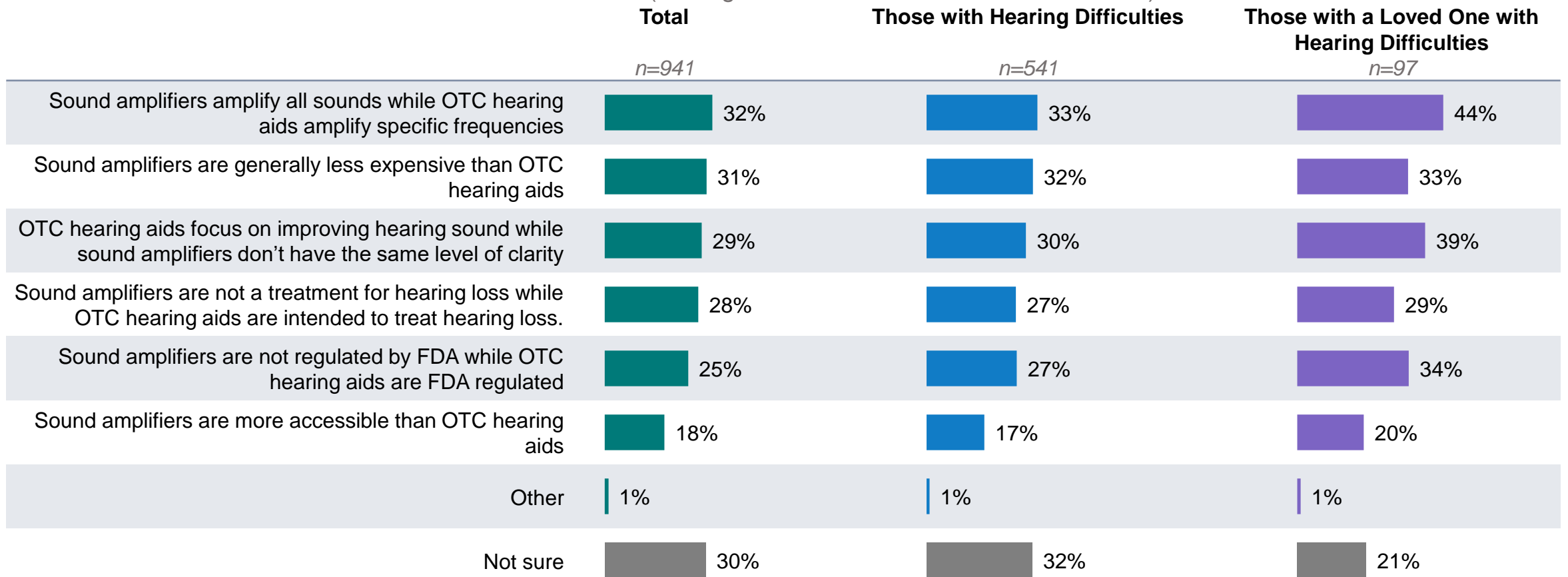
n=177

New question for this year hence no sig test

Among those who think OTC hearing aids and sound amplifiers differ, nearly one-third say sound amplifiers amplify all sounds vs. specific frequencies, and that sound amplifiers are generally less expensive. An equal number are unsure of the exact differences.

Differences Between OTC Hearing Aids vs Sound Amplifiers

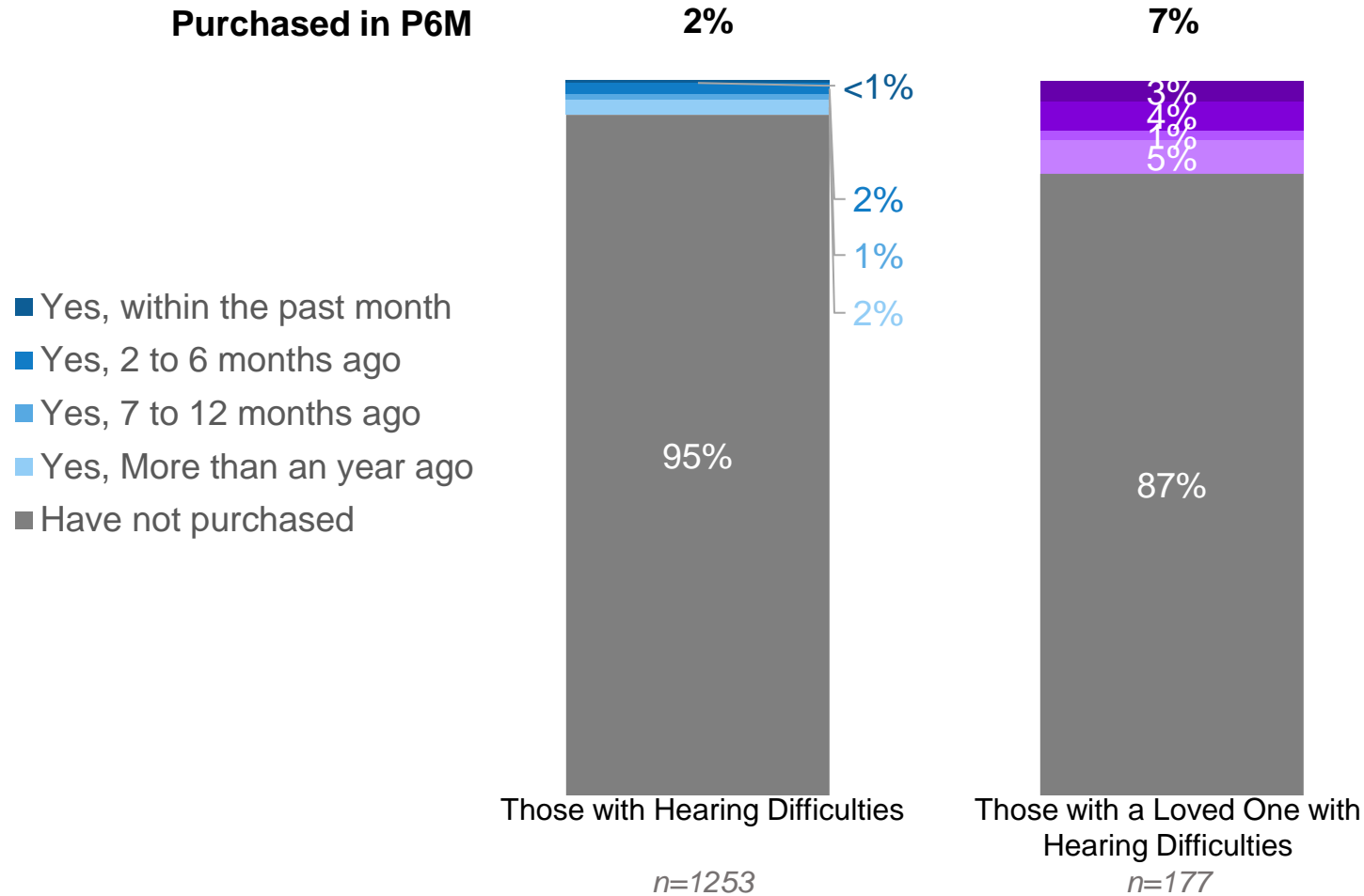
(Among those who think there are differences)



Given recency of release, few have purchased an OTC hearing aid – just 2% of those with hearing difficulties.

OTC Hearing Aid Purchase

(Among those/a loved one with hearing difficulties)



New question for this year hence no sig test

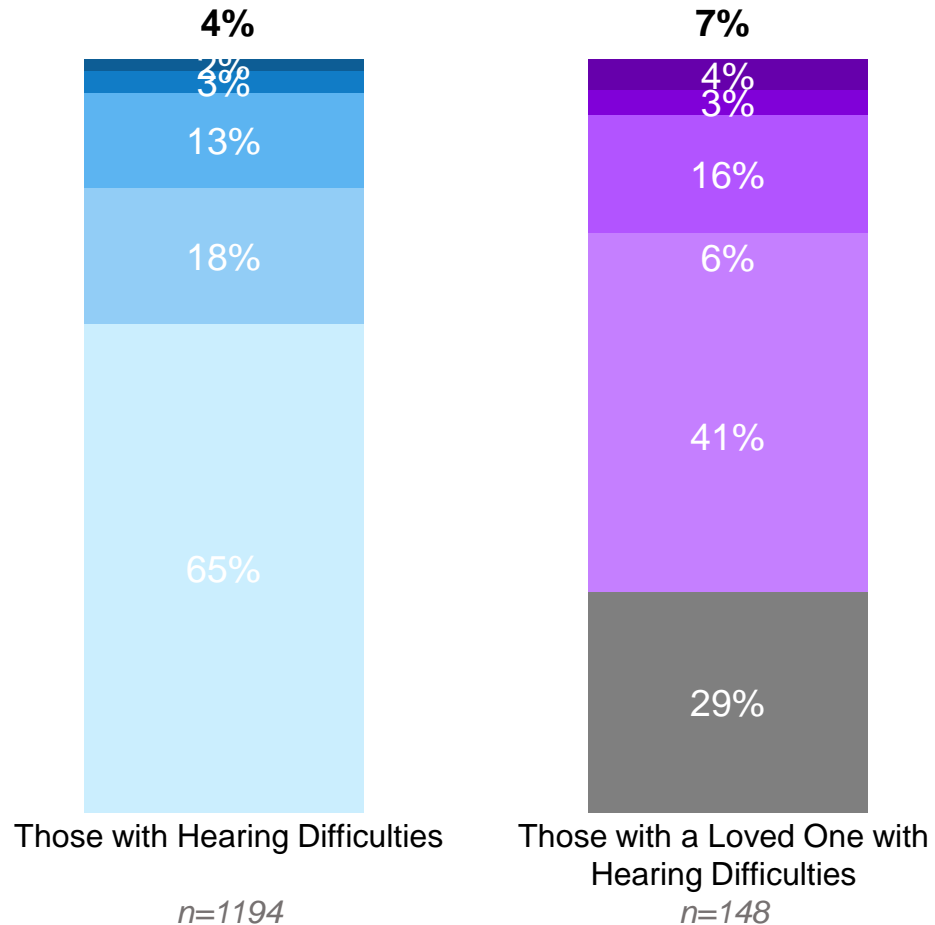
Likelihood to purchase OTC hearing aids is low, with just 4% of those with hearing difficulties stating an intent to purchase.

Likelihood to Purchase OTC Hearing Aid in Next Year

(Among those who have not purchased OTC hearing aid)

Top 2 Box (Likely)

- 1 Extremely likely
- 2
- 3
- 4
- 5 Not at all likely
- Not sure



New question for this year hence no sig test

Slightly more than 1-in-5 are confident that a device could assist with managing hearing loss, nearly a quarter of those at least somewhat confident a device could assist are confident they could choose the correct device.

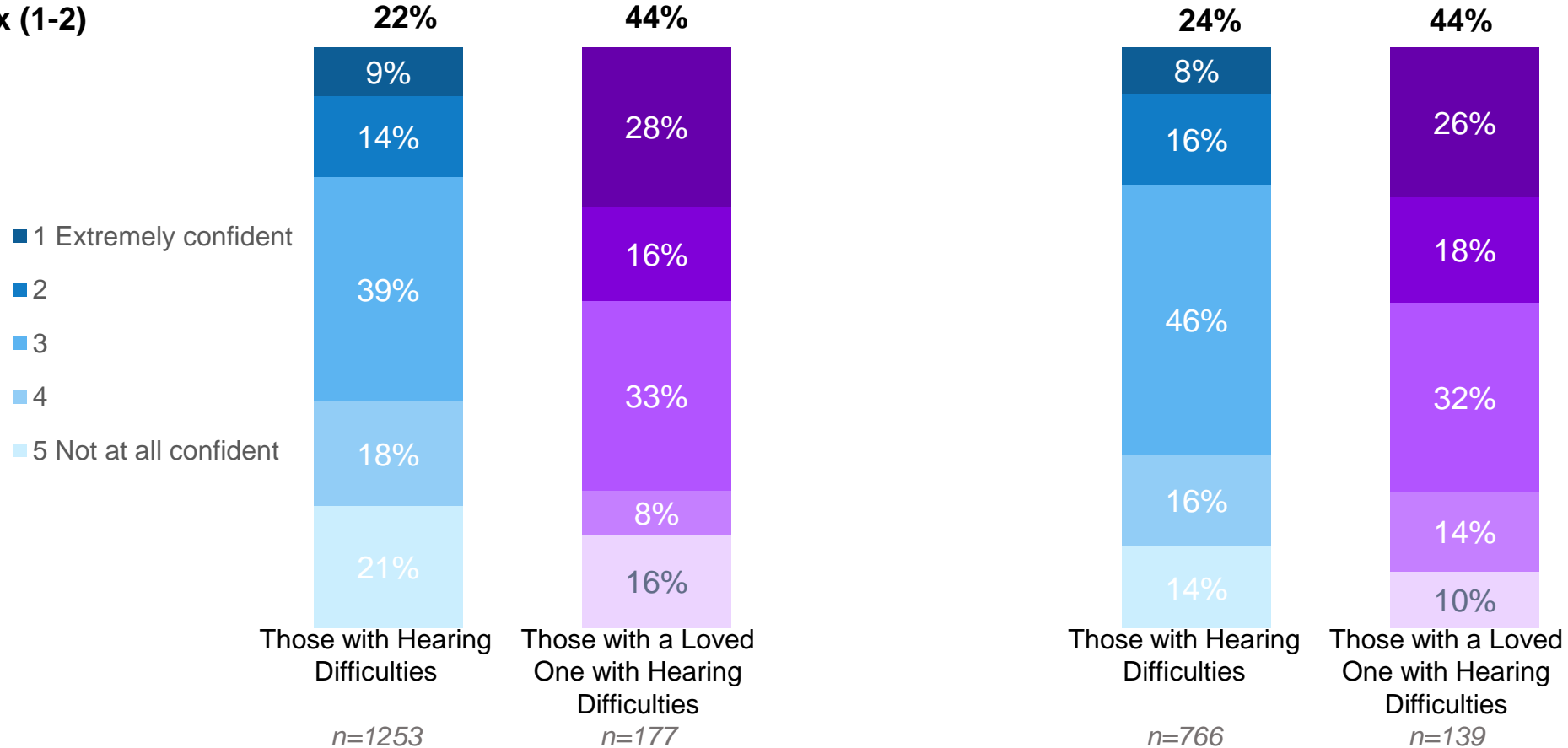
Confidence That a Device Could Assist With Managing Hearing Loss

(Among those/a loved one with hearing difficulties)

Confidence in Ability to Choose the Right Device to Manage Hearing Loss

(Among those who are at least somewhat confident device could assist)

Top 2 Box (1-2)



New question for this year hence no sig test

► Satisfaction, Barriers & Triggers

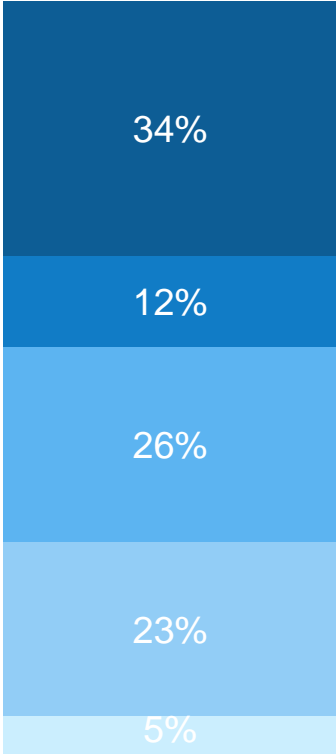
Nearly half of purchasers reported being highly satisfied with their OTC hearing aids.

Satisfaction With OTC Hearing Aid Performance

(Among buyers of OTC hearing aids)

Top 2 Box (Satisfied) 46%

- 1 Extremely Satisfied
- 2
- 3
- 4
- 5 Extremely Dissatisfied



n=37*

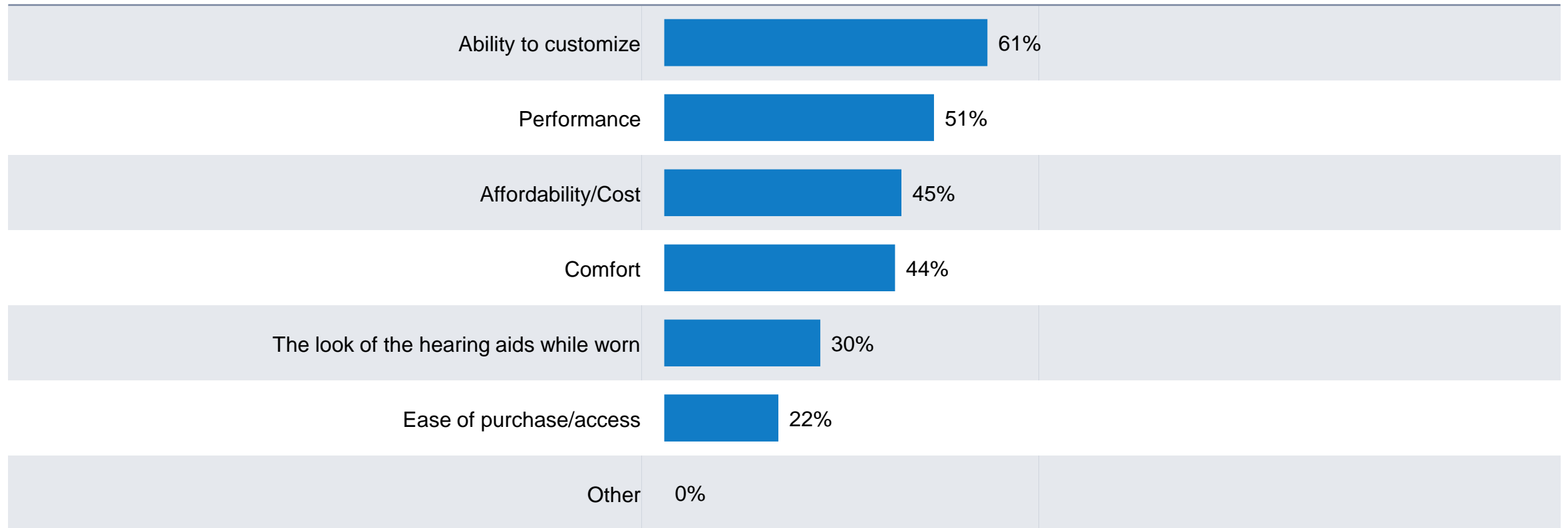
**Small base size, findings are directional in nature
New question for this year hence no sig test*

Customization followed by performance fuelled satisfaction levels for OTC hearing aid purchasers.

Reasons for Satisfaction

(Among satisfied recent buyers)

*n=20***



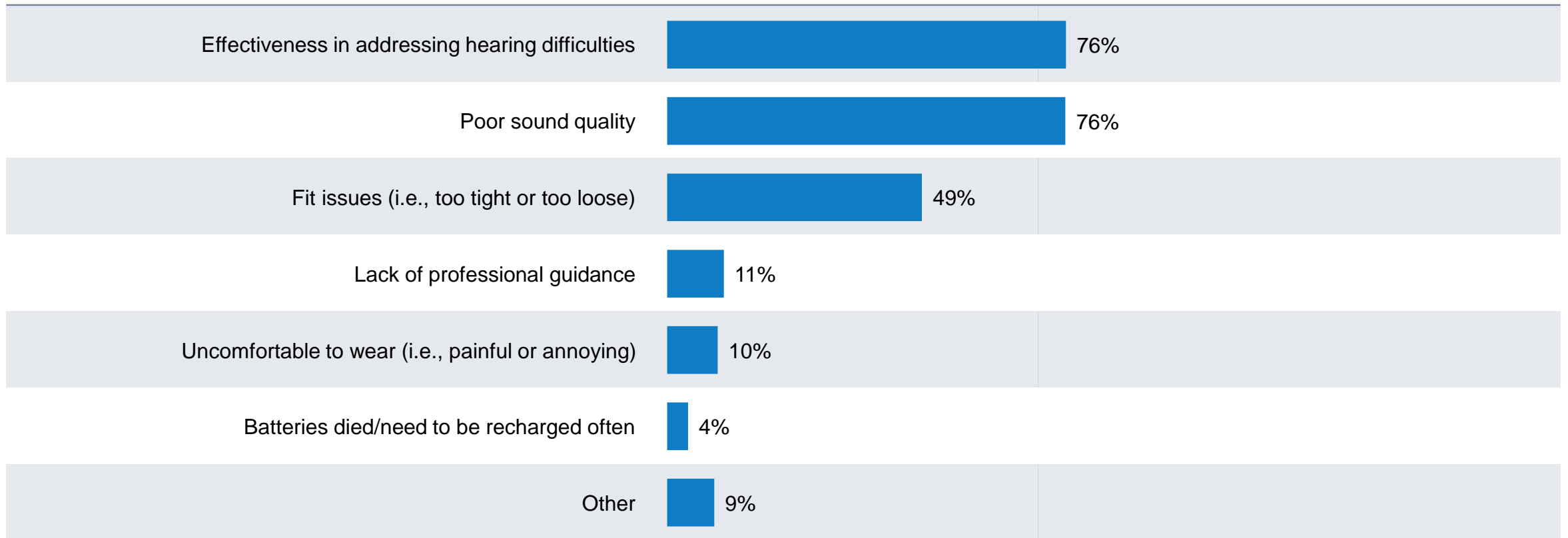
**Small base size, findings are directional in nature
New question for this year hence no sig test*

Lack of effectiveness and poor sound quality were cited as the main reasons for dissatisfaction.

Reasons for Dissatisfaction

(Among dissatisfied recent buyers)

*n=7***



**Small base size, findings are directional in nature*

New question for this year hence no sig test

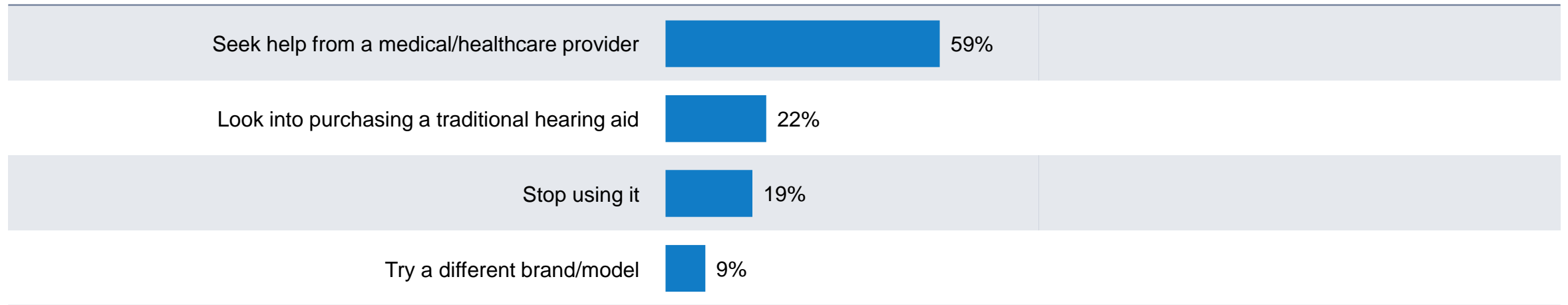
**** low base size**

The most common next step to address dissatisfaction would be to seek medical care.

Actions if Dissatisfied

(Among dissatisfied recent buyers)

*n=7***

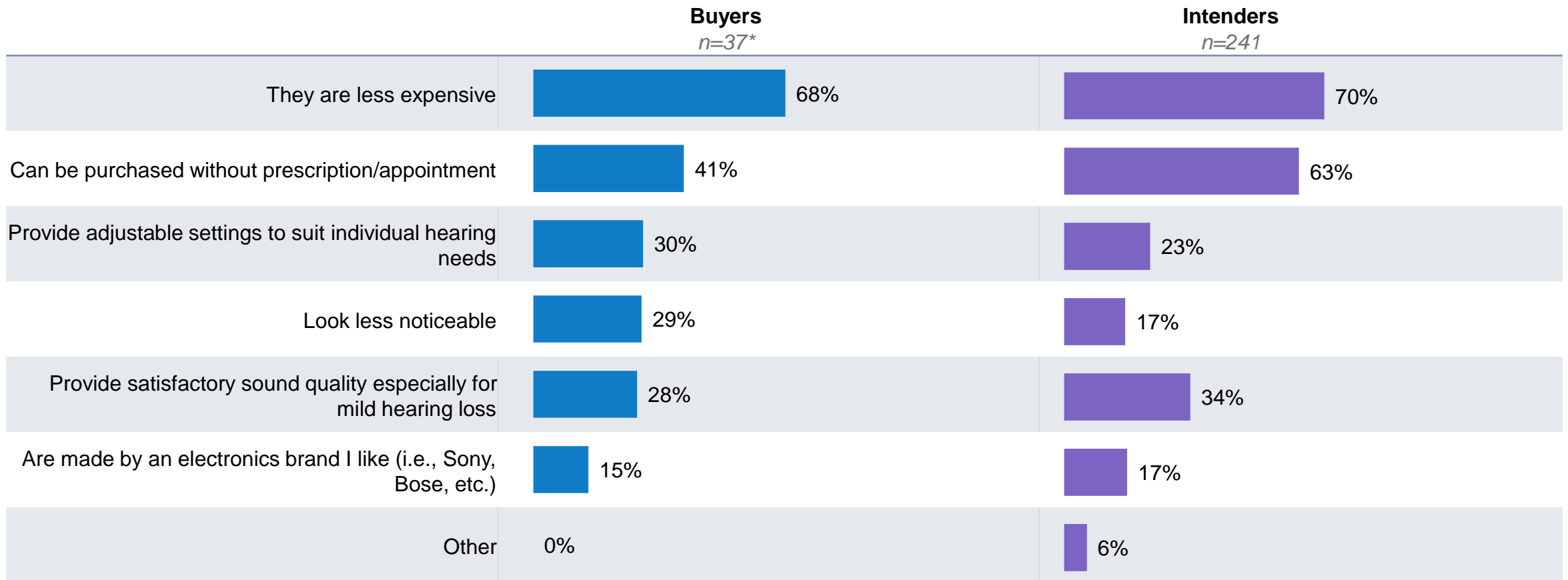


**Small base size, findings are directional in nature
New question for this year hence no sig test*

Perceived cost effectiveness and availability without prescription are key preference drivers.

Reasons for Preferring OTC

(Among buyers and purchase intenders)



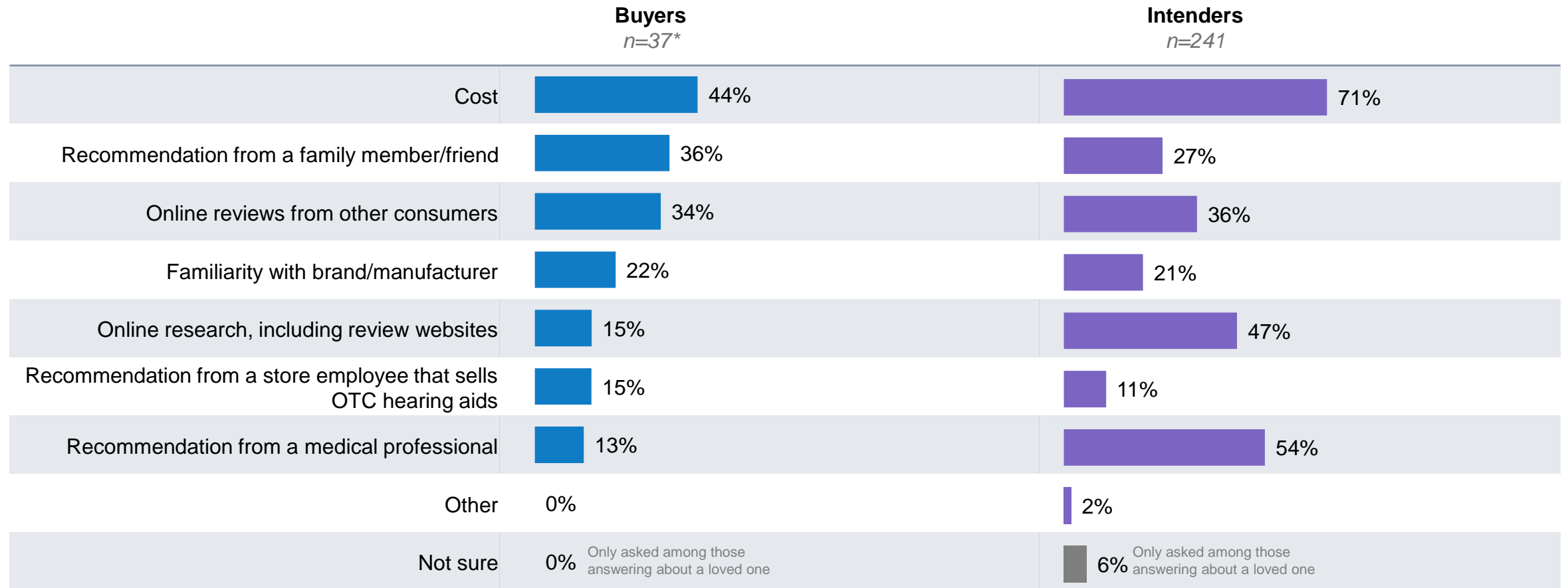
**Small base size, findings are directional in nature*

New question for this year hence no sig test

Cost plays the largest role for buyers and intenders alike.

Purchase Influencers

(Among buyers and intenders of OTC hearing aids)

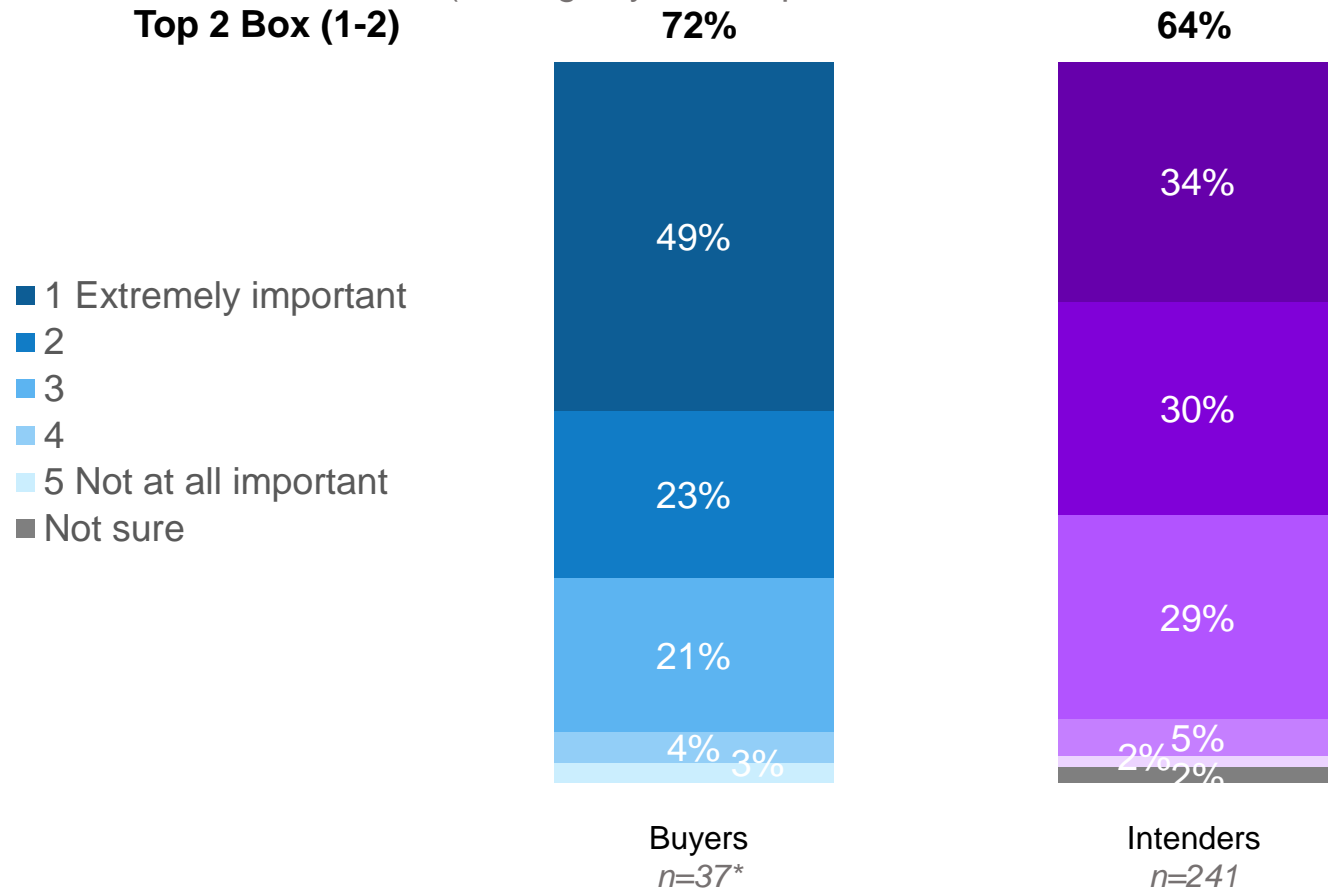


**Small base size, findings are directional in nature
New question for this year hence no sig test*

7-in-10 purchasers think it is important to receive professional guidance before purchasing an OTC hearing aid.

Importance of Guidance Prior to Purchase

(Among buyers and purchase intenders of OTC hearing aids)



**Small base size, findings are directional in nature
New question for this year hence no sig test*

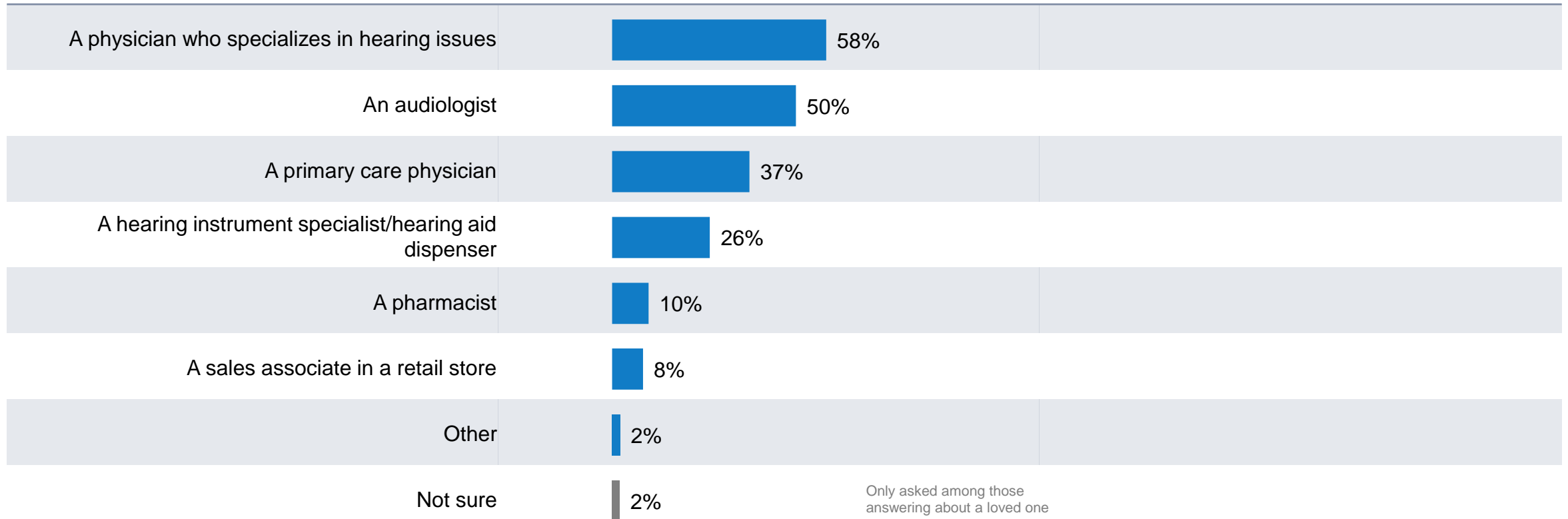
Physicians who specialize in hearing issues are the top choice, followed by audiologists and then PCPs.

Comfortable Seeking Guidance From

(Among those who think it is least somewhat important to receive guidance)

Important to receive guidance

n=272

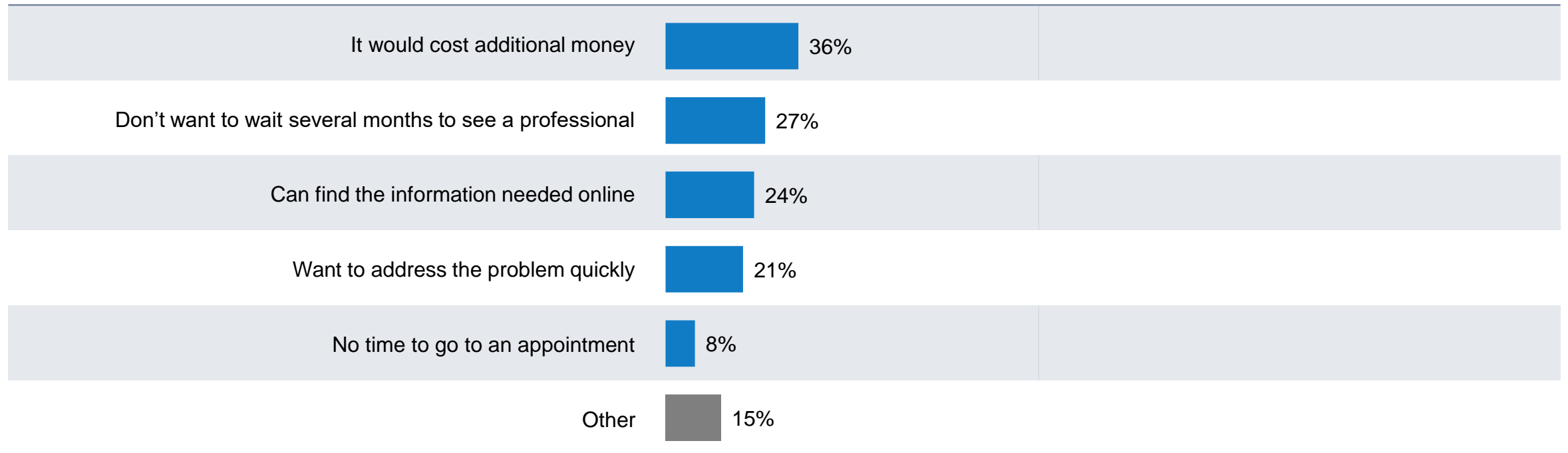


Cost was the primary deterrent in not wanting to seek professional guidance prior to purchasing an OTC hearing aid.

Reason for Not Wanting Professional Guidance

(Among those who think it is not important to receive guidance)

*n=18***



**Small base size, findings are directional in nature*

New question for this year hence no sig test

Buyers paid about \$233 on average for their OTC hearing aids, while intenders estimate they would spend about \$200.

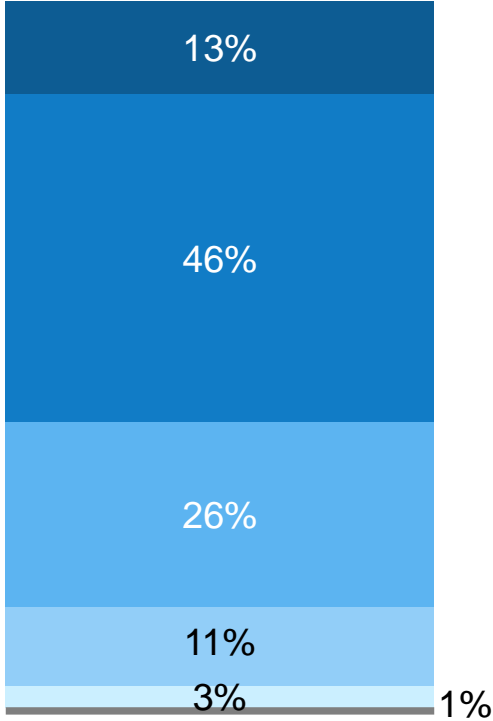
Amount paid for OTC hearing aids

(Among buyers of OTC hearing aids)
n=37*

Average

\$233

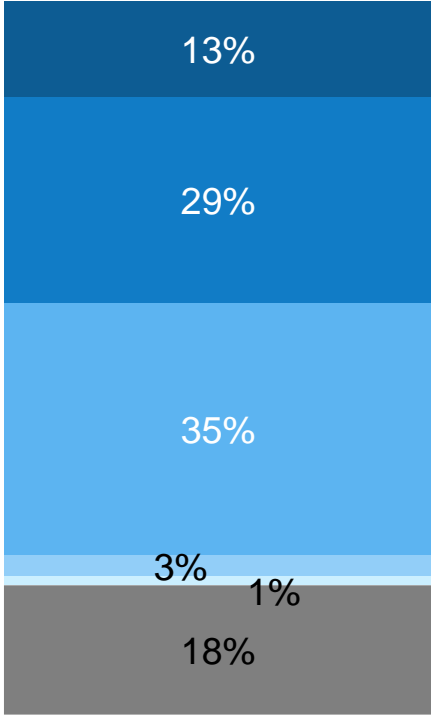
- Less than \$50
- \$50 to \$100
- \$101 to 500
- \$501 to 1000
- \$1,001+
- Don't know/Not sure



Amount willing to pay for OTC hearing aids

(Among future purchase intenders)
n=241

\$201

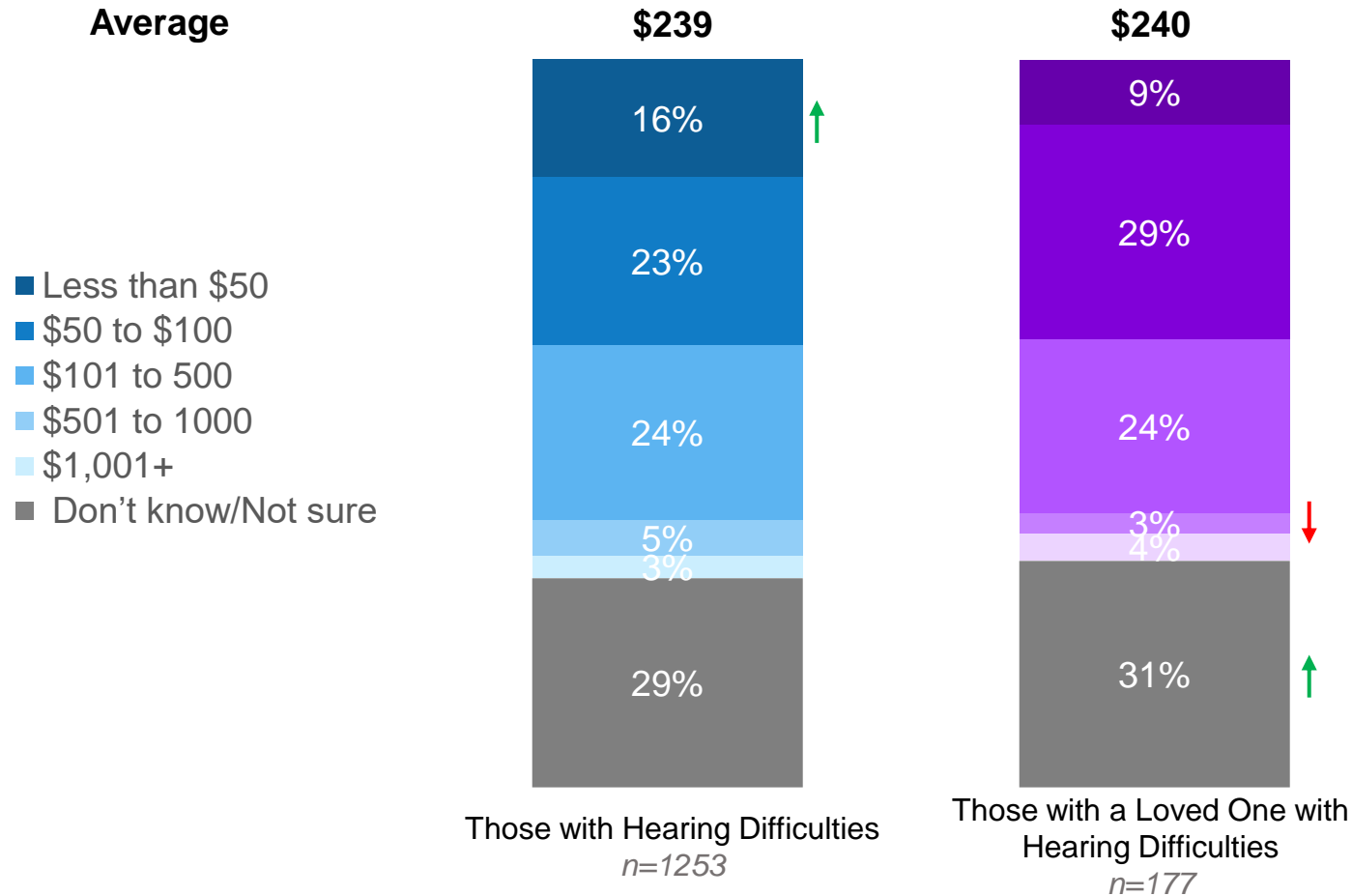


*Small base size, findings are directional in nature
New question for this year hence no sig test

The estimated average cost for OTC hearing aids is approximately \$240. Perceptions that they are available for less than \$50 have increased since 2021.

Expected Cost of OTC Hearing Aid

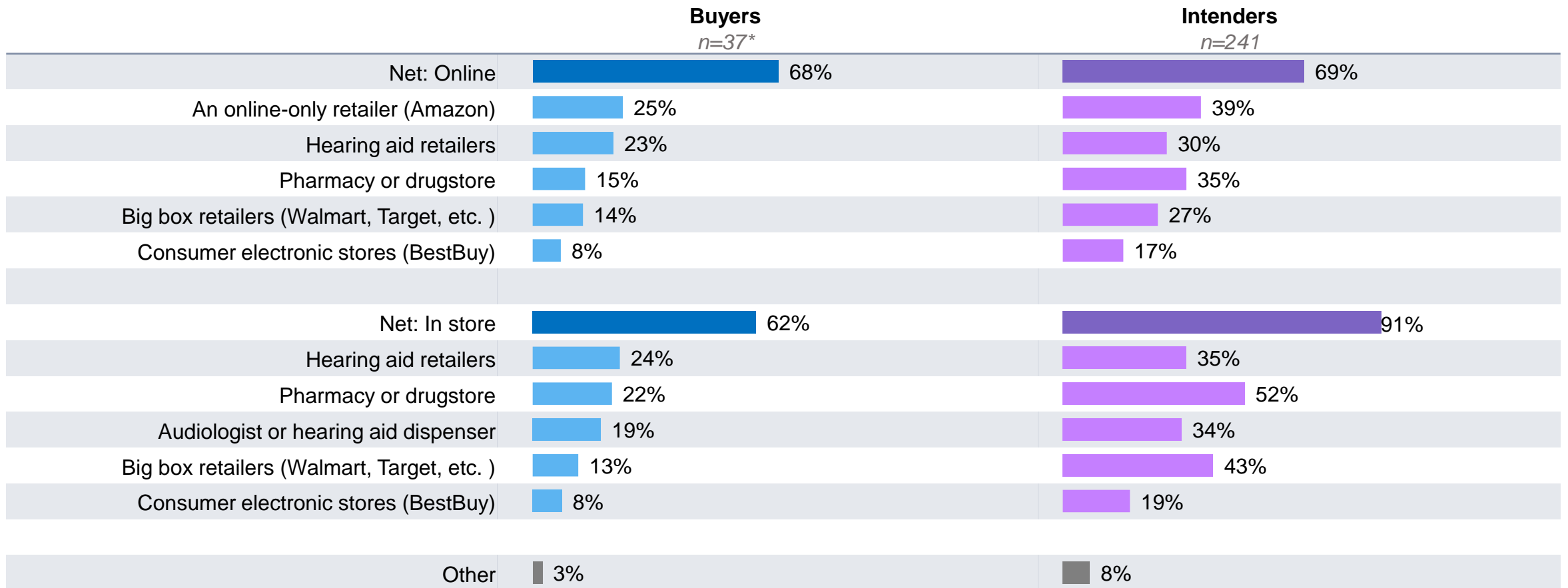
(Among those with hearing loss or influence over family member with hearing difficulty)



OTC hearing aids are purchased both online and in store, though intenders are more likely to say they will purchase in store.

Place of Purchase

(Among buyers and intenders of OTC hearing aids)



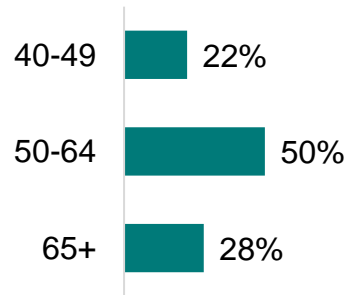
**Small base size, findings are directional in nature*

New question for this year hence no sig test

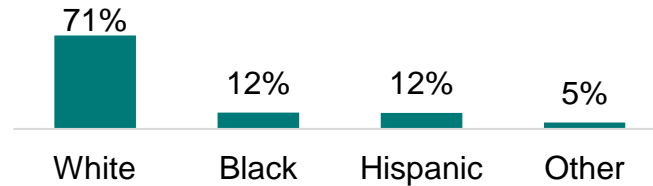
Demographics

Demographic Profile – Total

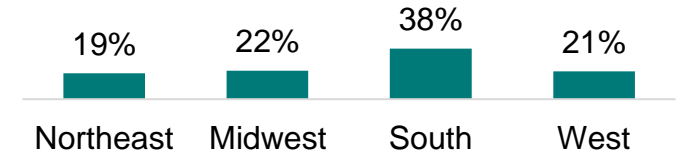
Age



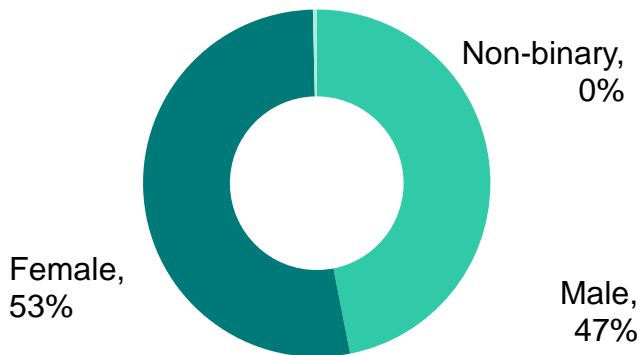
Race



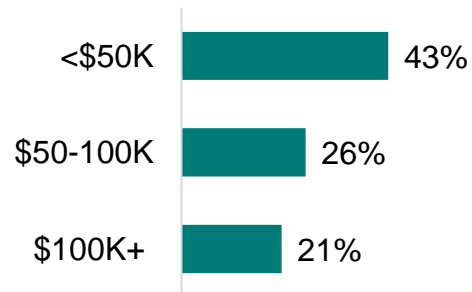
Region



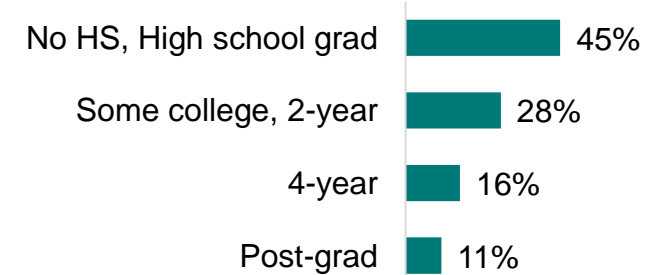
Gender



Income

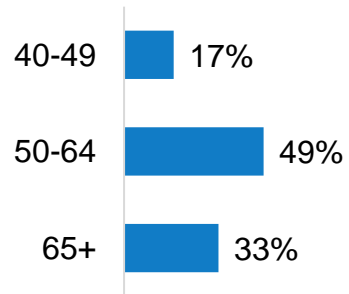


Education

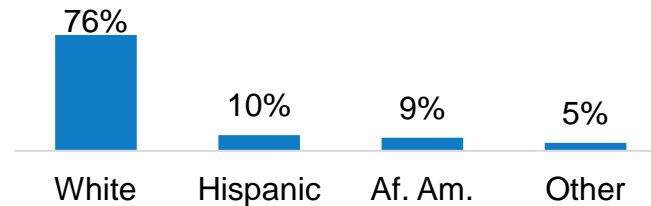


Demographic Profile - Those with Hearing Difficulties

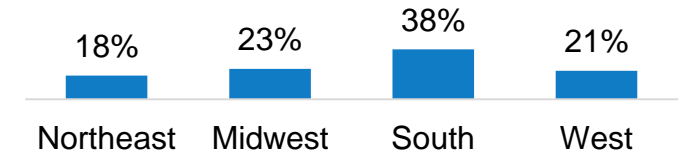
Age



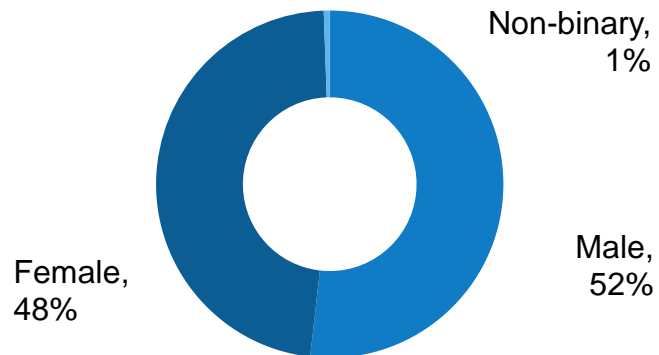
Race



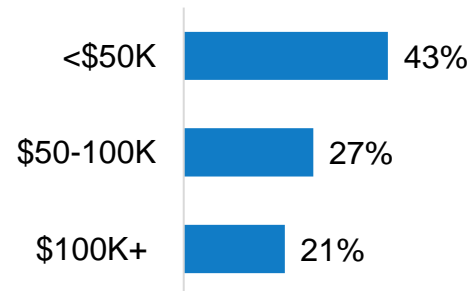
Region



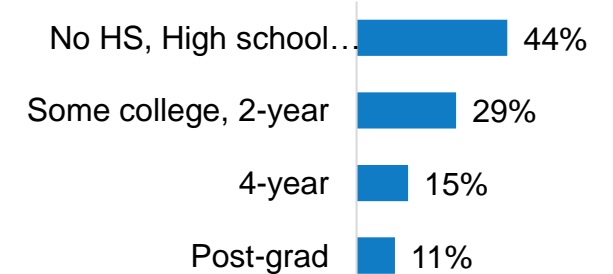
Gender



Income

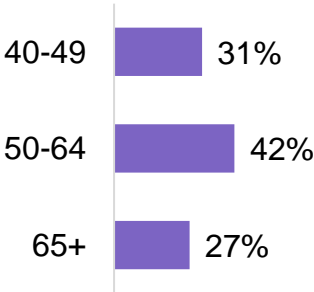


Education

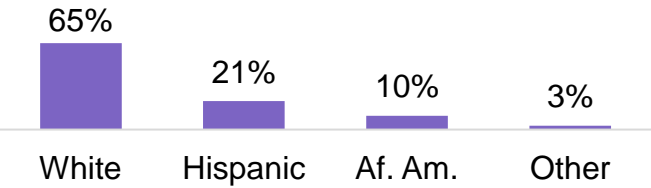


Demographic Profile - Those with a Loved One with Hearing Difficulties

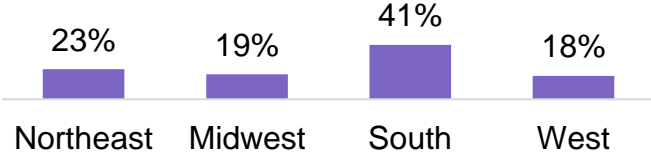
Age



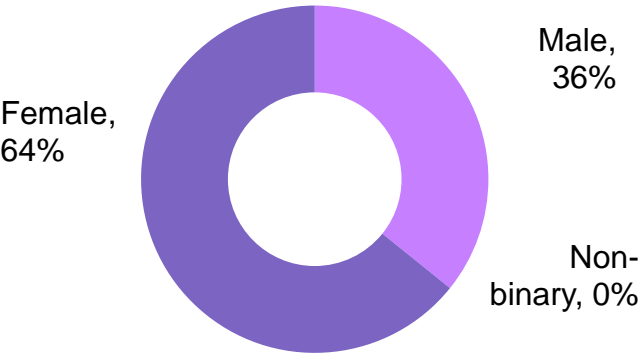
Race



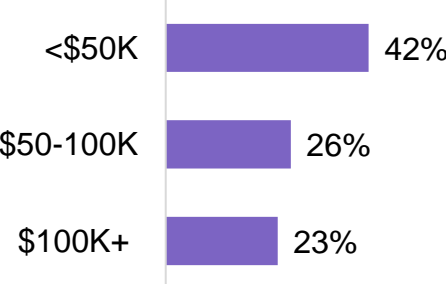
Region



Gender



Income



Education

