



Auditory Insight®

Go-To-Market Strategy in Hearing Healthcare

The Essential Consumer-Patient Journey

Introduction from Nancy M. Williams, Auditory Insight President

Since our founding, Auditory Insight® has co-created market development and go-to-market strategies with our clients in all sectors of hearing healthcare: OTC and prescription hearing aids, cochlear implants, genetic testing, and gene/drug therapies for hearing restoration.

A core foundation to those strategies is insights from the consumer-patient journey. We define the journey as the set of lived experiences of people with hearing loss, from their first inkling of hearing difficulties until they integrate hearing interventions into their everyday lives.



We believe that the ongoing consumerization of hearing healthcare makes understanding the consumer-patient journey more essential than ever, even for interventions like cochlear implants and genetic testing. We explain why in this research note.

The note also:

- Details how to analyze the consumer-patient journey
- Explains how to translate insights from the journey into strategy development
- Provides a case example in genetic testing.

We look forward to discussing this Auditory Insight research note with our valued clients.

The New OTC Hearing Aid Category Will Hasten the Consumerization of Hearing Healthcare

In the past year, Sony has entered the new Over-the-Counter (OTC) hearing aid market, with EssilorLuxottica and Intel announcing plans for the category. Meanwhile, Apple continues to add hearing functionality to its AirPods Pro earbuds, although the company has not yet filed for Food and Drug Administration clearance.

The implication is the **continued consumerization of hearing healthcare**, in which the consumer-patient plays an increasingly active role in managing their hearing interventions.

High deductibles and lack of insurance coverage already has forced many patients in hearing healthcare to become consumers*, who evaluate their clinicians' recommendations not only on medical terms, but also financial. We see global brands competing in OTC hearing aids as accelerating this trend, with **these brands' presence having spillover effects for interventions like cochlear implants and genetic testing**. More consumer-patients will educate themselves about hearing loss and become decisive about how to address the condition.

In response, hearing healthcare companies need to address consumer-patient engagement in their market development strategies. This insight applies even if a company's primary audience is clinicians, such as audiologists, neurotologists, or genetic counselors.

["Consumerization of healthcare: We see you, Amazon,"](#)
Tracy Watts, Mercer blog entry, Feb 17, 2021.



AirPods Pro (2nd gen)
function as hearing aids
(directional mics,
programming with
audiogram)

EssilorLuxottica

Integrated glasses and
hearing aid solution powered
by Nuance acquisition to
launch 2H 2024



Filed patent for hearing
aid system - earbuds
connected to
smartphones,
computers, etc. which
handle audio processing

SONY

Sony Self-Fitting OTC
Hearing Aids retail online
as part of partnership with
WS Audiology

The Consumer-Patient Journey is Essential for Creating Market Development Strategy

At Auditory Insight®, we believe that a rigorous understanding of the consumer-patient journey is essential. **Insights from the journey identify opportunities to speed adoption and drive strategy development.**

Yet many executives, in our experience, neglect the consumer experience. The process of identifying consumer-patients, structuring conversations, and analyzing the data to create actionable results is complex.

Often, executives rely on perspectives from internal stakeholders and audiologists, who provide valuable points of view. But that approach misses insights from the consumer-patient experience, insights which **often provide the missing link to creating an effective market development strategy.**

When Auditory Insight® works with clients to analyze the journey, **our proprietary framework plays a central role.** Shown at right, for example, is a high-level view of our framework applied to adults indicated for prescription hearing aids.

Auditory Insight® Proprietary Framework for Consumer Journey with Prescription Hearing Aids

Awareness

Coming to terms with the possibility of hearing loss

Hearing Testing and Diagnosis

Engaging with a clinician who administers test

Intervention

Pursuing recommended treatment, usually a hearing aid

Acclimatization

Adjusting to wearing hearing aids on a regular basis

Integration

Assimilating wearing hearing aids in personal and professional lives

Auditory Insight's® Framework Has Multiple Dimensions

Auditory Insight's® proprietary framework for the journey analyzes the consumer-patient experience along multiple dimensions, in behavioral, psychological, and structural domains.

We have **deployed our framework across all sectors of hearing healthcare**—hearing aids, cochlear implants, and genetic testing—creating market development strategies for companies in hearing healthcare and hearing restoration.

Occasionally, clients suggest that we begin the market development strategy process with the ideal consumer-patient journey. But conceiving the ideal without grounding it in the actual risks not producing actionable insights.

In our practice, we start with the current journey, what the consumer-patient experiences today. We examine how they ultimately benefitted from their hearing health intervention, but also their denial, wasted time, and barriers to care along the way.

The consumer-patients' lived experiences provide a springboard to creating the ideal journey and market development strategy.

Auditory Insight® Proprietary Framework for Consumer-Patient Journey

BEHAVIORAL, PSYCHOLOGICAL, AND
STRUCTURAL DIMENSIONS

Awareness

Diagnosis

Intervention

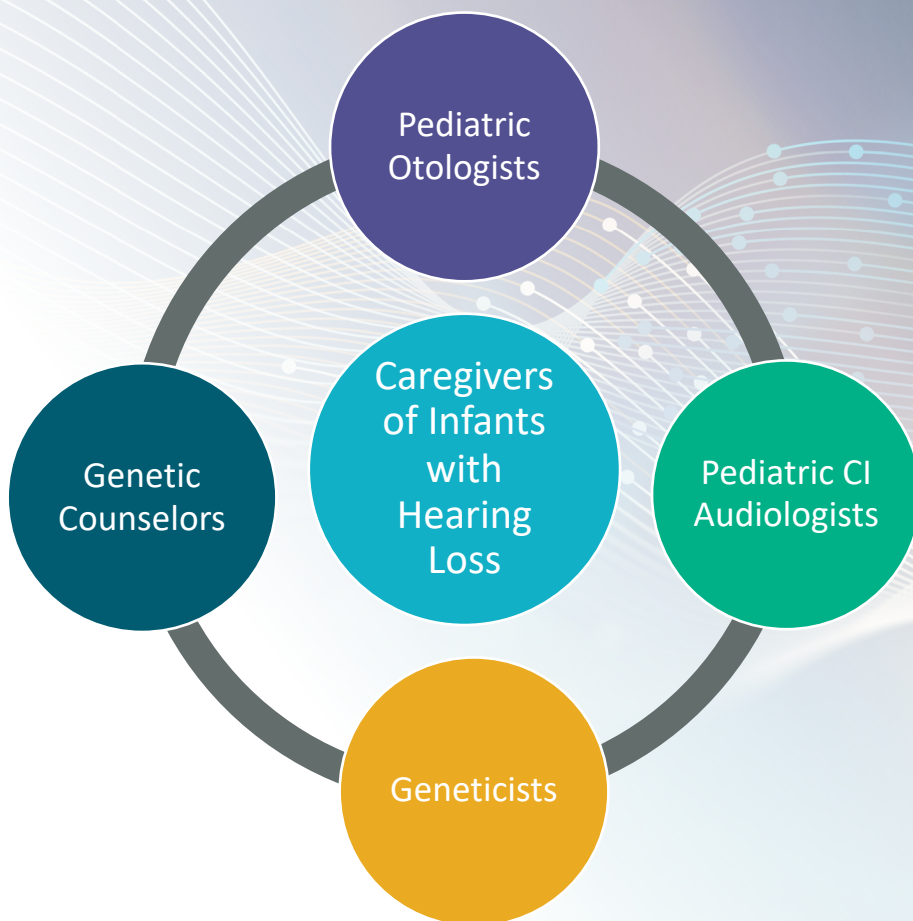
Acclimatization

Integration

Auditory Insight's® Work in Action in Genetic Testing

We often **integrate the consumer-patient journey with that of other hearing healthcare market stakeholders**. This comparative analysis has the potential to yield tremendous insight.

For a recent engagement with a gene therapy company addressing hearing loss, we created a market development strategy for genetic testing. We first explored the barriers to genetic testing from the perspective of otologists, CI audiologists, geneticists, and genetic counselors.



We then compared the clinicians' perspective to the barriers identified by parents of infants with hearing loss (the consumer-patient in this case). In fact, we conducted exploratory interviews with caregivers whose children had been treated by the very same clinicians in our study.

We discovered that one part of the clinical narrative triggered close to half of caregivers into refusing genetic testing for their infant, generating the opposite effect intended. On the flip side, few clinicians provided the one reason for genetic testing that united all the caregivers.

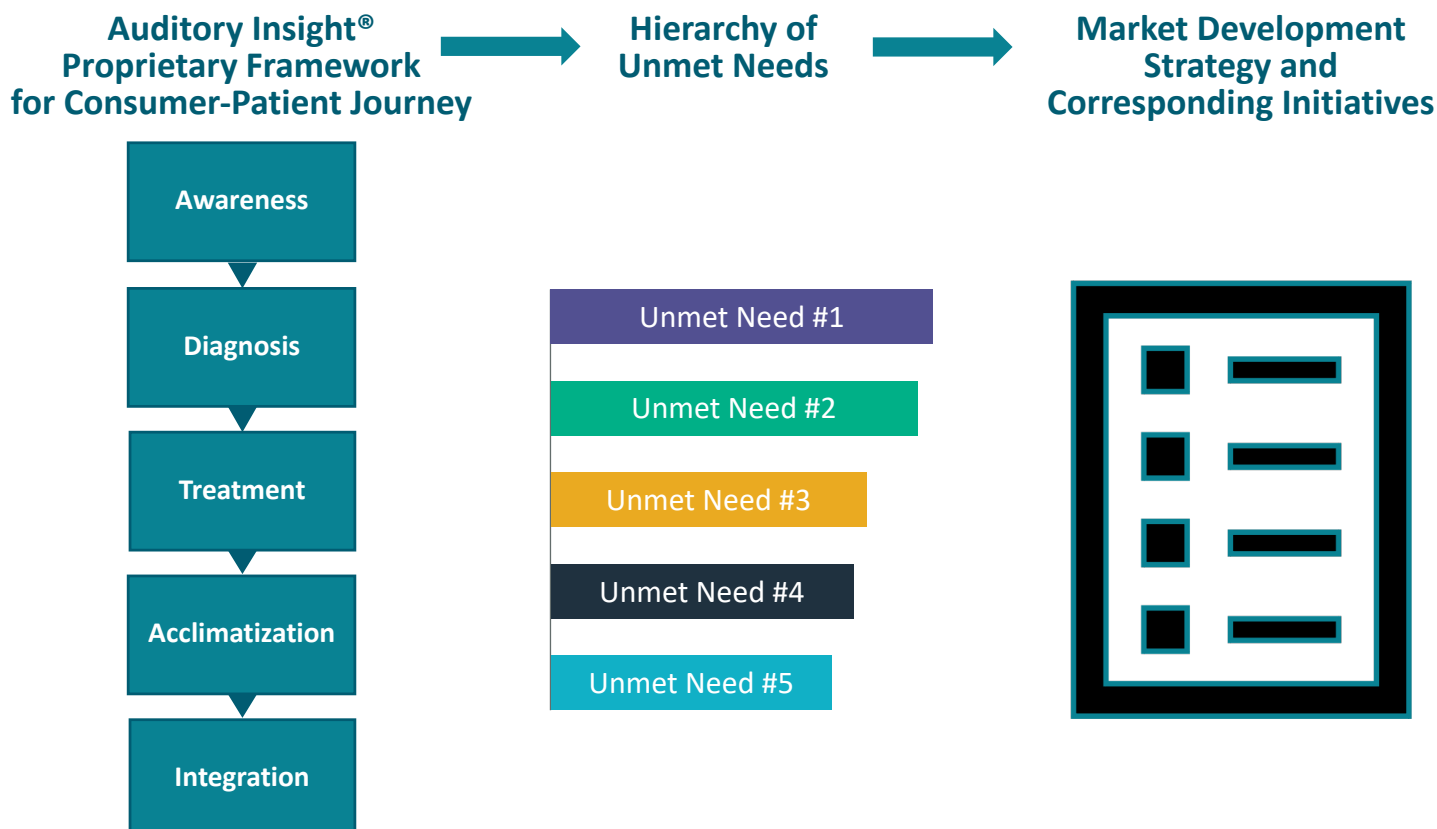
These insights drove an important recommendation for clinician education and support in our market development strategy.

We Translate the Consumer-Patient Journey into Strategy

Once we complete the consumer-journey analysis, **we create a summary page encapsulating the journey along its key dimensions**. Clients use this output to incorporate the consumer-patient perspective into hundreds of decisions throughout the organization, from clinical development to new product planning.

Just as importantly, the consumer-patient journey provides a bedrock for the market development strategy. **Translating insights from the journey to strategy development requires art as much as science**. At Auditory Insight®, we often create a hierarchy of unmet needs to help make that translation.

The result? A market development strategy reflecting current realities and company goals, while addressing the needs of the key market stakeholders, including the consumer-patient.



Auditory Insight® Helps Create Value for Clients in Their Mission to Address Hearing Loss

Auditory Insight partners with senior leaders of device and pharma companies to develop successful market development and commercialization strategies. The firm also advises growth equity and private equity firms to create portfolio value in hearing healthcare.

Auditory Insight's® helps fuel growth by bringing clarity to market opportunities. The firm's strategic advice has contributed to its clients raising \$600M in funding rounds and IPOs in the last five years.



Auditory Insight®

Strategy consulting in hearing healthcare.

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