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Signia Expert Series:  
***Competing in Today's Disruptive  
Audiological Environment***

***Presented by Aryn Amlani, PhD***

- 
- This course is offered for Continuing Education Units (CEU)s for Total Access Online members.
    - Stay logged in for the duration of the course to be eligible to earn CEU credit.
    - Take the exam following course completion to earn credit.
    - For questions or assistance, contact 800-753-2160.
  - Please visit the AudiologyOnline website for other live and recorded events from Signia.

<http://www.audiologyonline.com/ce/signia-siemens>

## Learning Outcomes

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Upon completing this course learners will be able to.....

- Describe how economic and marketing principles support growth opportunities in the hearing aid market
- Describe how professional services rendered, and not price, is the primary factor in the procurement of audiology services and technology.
- Discuss strategies that increase audiology awareness, service and technology adoption rates, and, ultimately, total revenue.

## Introducing....

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***Amyl Amlani, PhD***





# COMPETING IN TODAY'S DISRUPTIVE AUDIOLOGICAL ENVIRONMENT: TOOLS FOR SUCCESS

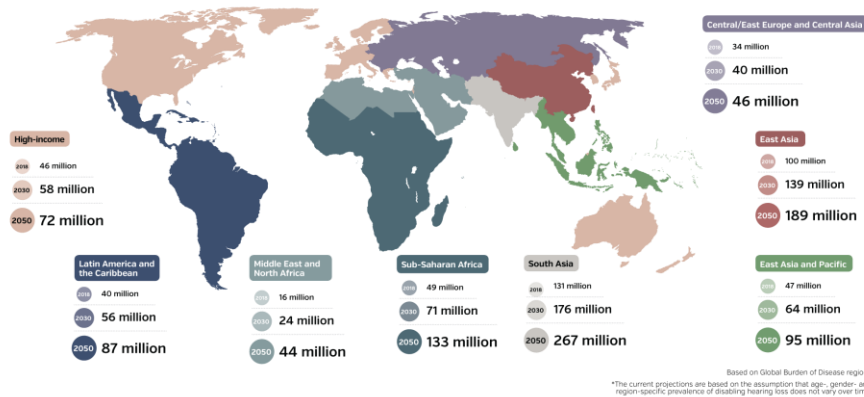
Amy M Amlani, PhD  
Signia Expert Series - Live Webinar  
14 June 2019



## Disclosures

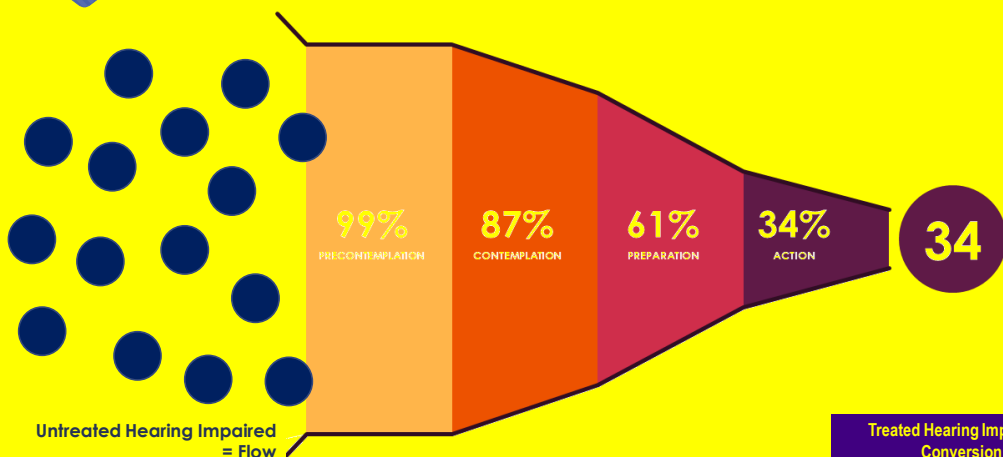
- Financial
  - Employee at Audigy
  - Former Employee at:
    - University of Arkansas for Medical Sciences
    - University of North Texas
  - Sponsored funding from Audioscan, Signia, Unitron
- Non-Financial
  - Editor – Economics Section, HHTM

## Projected number of people with hearing loss in different world regions until 2050



The map shows the current and projected number of people with hearing loss in different regions. Projections show that the number of people with disabling hearing loss will increase in all regions.

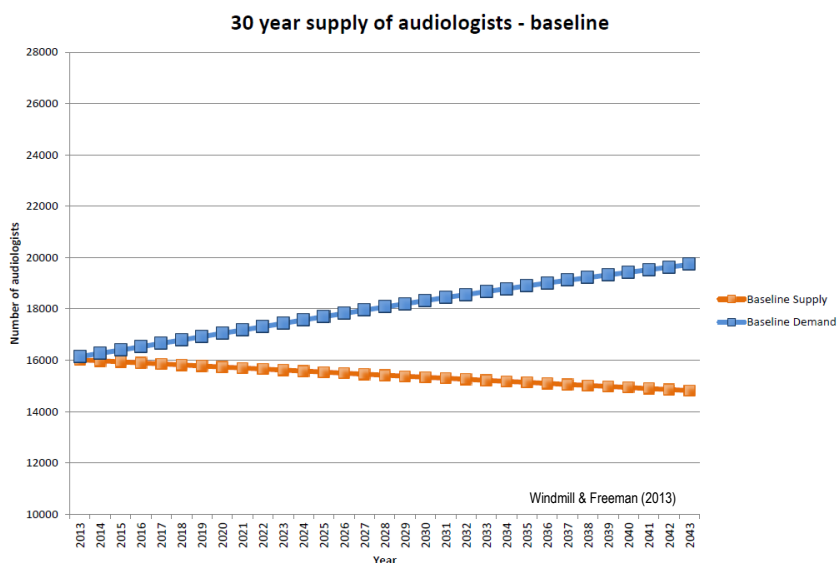
## Patient Flow and Conversion – Global

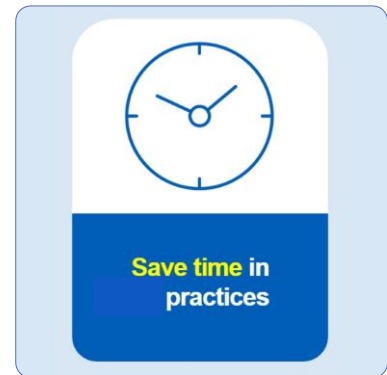
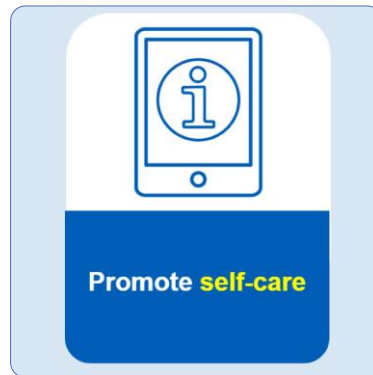


Country	Hearing loss prevalence (% of HI in population)	Adoption rate (% of HI with HAs)	Bilateral rate (% of HA owners w/ 2 HAs)
Germany	12.1%	34.9%	75%
France	9.3%	34.1%	70%
UK	9.7%	42.4%	61%
Italy	11.7%	25.2%	57%
Switzerland	8.0%	41.4%	72%
USA	10.6%	30.2%	72%

Hougaard et al (2016) - EuroTrak

## PATIENT UPTAKE - GLOBAL





<https://twitter.com/NHSDigital/status/1037696162755735555>

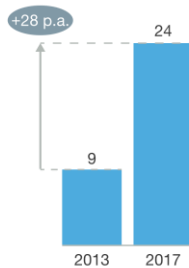
## NEW AGE IN HEALTH CARE



### Retail clinic use is steadily growing

#### Consumers who report using retail clinics

%

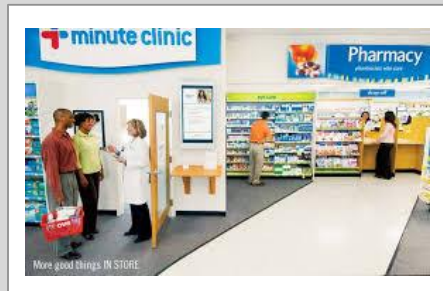
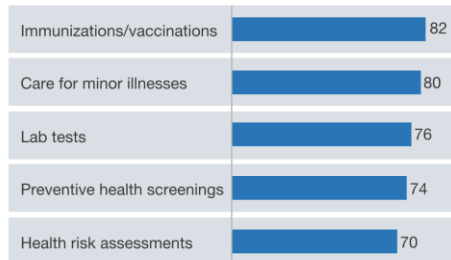


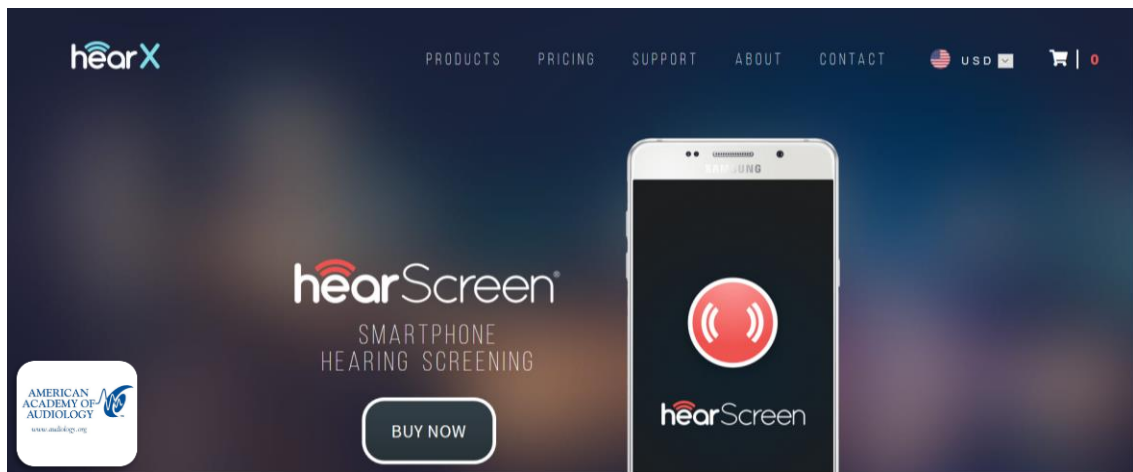
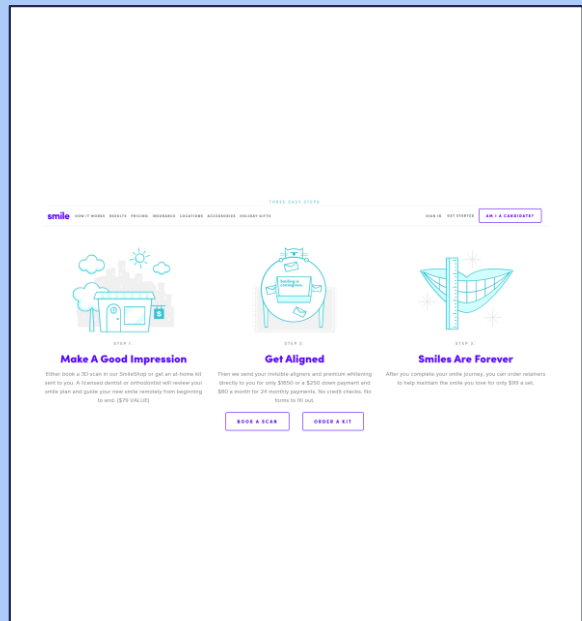
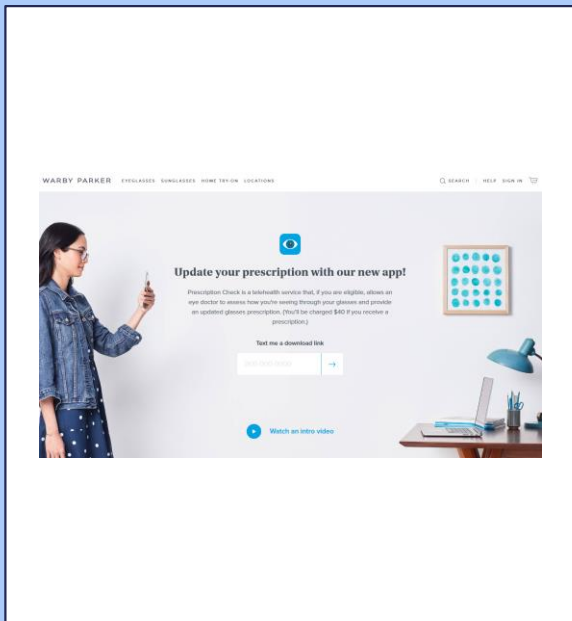
p.a., per annum.

McKinsey&Company | Sources: McKinsey 2013 and 2017 Consumer Health Insight Surveys

#### Consumers willing to seek various types of care at a retail clinic

%






**PSAP Plus Hearing Enhancer**

**\$99.95** Per

- ✓ Two Listening Modes
- ✓ Adjustable Frequency Tuning feature adjusts bass and treble
- ✓ Powered by Lucid™ smart technology

**MORE INFO**



**AMERICAHEARS**



**90 DAY**  
**With You All**  
**the Way**  
PLEDGE

## Category 1: Preset Interface

(No audiogram; preset settings; no/limited specialist support)

**Unique to you,  
fine-tuned by you**

Create a personal hearing profile and program your optimal settings from the comfort of home with our free and easy-to-use app.

## Category 2: Customizable Interface

(audiogram online/app; profile-based settings/adjustments; specialist support available)



## HEARING BUDS PERSONALIZED FOR YOU

Introducing IQbuds™ BOOST with Ear ID™ – innovative hearing buds that learn and automatically adapt to your unique hearing profile. BOOST will transform the way you hear and connect to your world. The perfect enhanced hearing device for when you're not yet ready for a hearing aid.



**NUHEARA**

### EAR ID™ – TRANSFORM YOUR HEARING IN 3 EASY STEPS

From the comfort of your home and in less than 10 minutes, Ear ID allows you to assess your own hearing and then automatically calibrates the buds to your own personal hearing profile.



#### SELF FIT

Use the Ear ID app to assess your hearing. The app will create your own personal hearing profile.

#### SELF ASSESS

Use the Ear ID app to assess your hearing. The app will create your own personal hearing profile.

#### AUTO CALIBRATE

Use the Ear ID app to assess your hearing. The app will create your own personal hearing profile.

### INTRODUCING FOCUS

Bring the sound directly in front of you into sharper focus.



Focus uses "audio beamforming" technology to isolate and enhance sounds directly in front of the BOOST user, ensuring clear conversation clarity in noisy environments.



COMING APRIL 2019

### IQstream TV™ - HEAR TV BETTER



IQstream TV streams crystal clear stereo sound from the TV to your IQbuds™ BOOST so you can listen at the volume you want while others can listen at the volume they want.

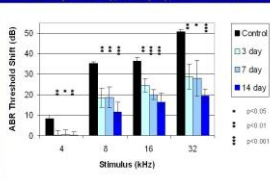
LEARN MORE

## Category 3: Expert Interface

(audiogram online/app; expert-like interface; optional specialist support)

### Otoprotection across frequencies

Continued 4 hr noise exposure:  
4.16 kHz noise at 113 dBSP  
4 mg/kg SPI-1005, ABR at 9 wks post noise,  
n=8 (3 & 14d), n=6 (7d), SEM shown



**Stanford MEDICINE** Stanford Initiative to Cure Hearing Loss  
Otolaryngology - Head & Neck Surgery

HOME RESEARCH BLOG MAKE A GIFT CONTACT US

### Four Key Areas

#### Stem Cell Therapy

Stem cell therapy could grow a new inner ear from a patient's own cells. ABR will be used to monitor the progress of the new inner ear.

#### Gene Therapy

Gene therapy could prevent the loss of the most sensitive forms of hearing loss are caused by mutations in only 1 gene.

#### Molecular Therapy

New drugs could prevent the loss of the most sensitive forms of hearing loss are caused by mutations in only 1 gene.

#### Targeted Neural Stimulation

Even with a hearing aid, neural stimulation requires by the hearing brain cells.

**Auris Medical** Cochlear Implants

Company Pathways Product Candidates Newsroom Investors

### Pipeline

Auris Medical is developing several pharmaceutical products for the treatment of inner ear disorders and central nervous system disorders.

We are focused on the development of ototoxicity inhibitors for the treatment of otitis media with effusion (OME) and for the prevention of ototoxicity-induced hearing loss and vestibular dysfunction. These programs have gone through the Phase I trials and will move into phase II development in 2019.

In addition, Auris Medical is developing a novel drug development platform (ADP) to enable faster drug development and to enable faster drug development.

Product	Indication	Phase	Next Key Milestone
AM-101	Otitis Media with Effusion (OME)	Phase I	Phase II
AM-102	Otitis Media with Effusion (OME)	Phase I	Phase II
AM-103	Otitis Media with Effusion (OME)	Phase I	Phase II
AM-104	Otitis Media with Effusion (OME)	Phase I	Phase II
AM-105	Otitis Media with Effusion (OME)	Phase I	Phase II
AM-106	Otitis Media with Effusion (OME)	Phase I	Phase II
AM-107	Otitis Media with Effusion (OME)	Phase I	Phase II
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AM-200	Otitis Media with Effusion (OME)	Phase I	Phase II

Product Candidates

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Products



Service Delivery

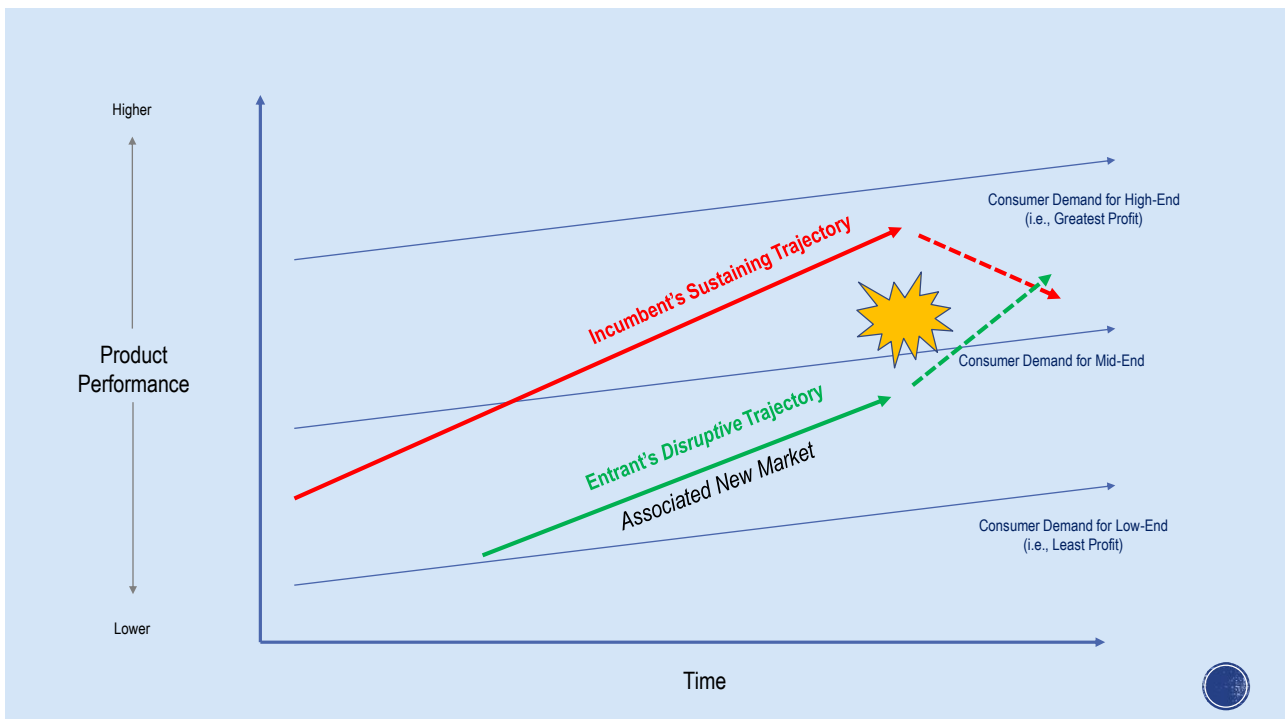
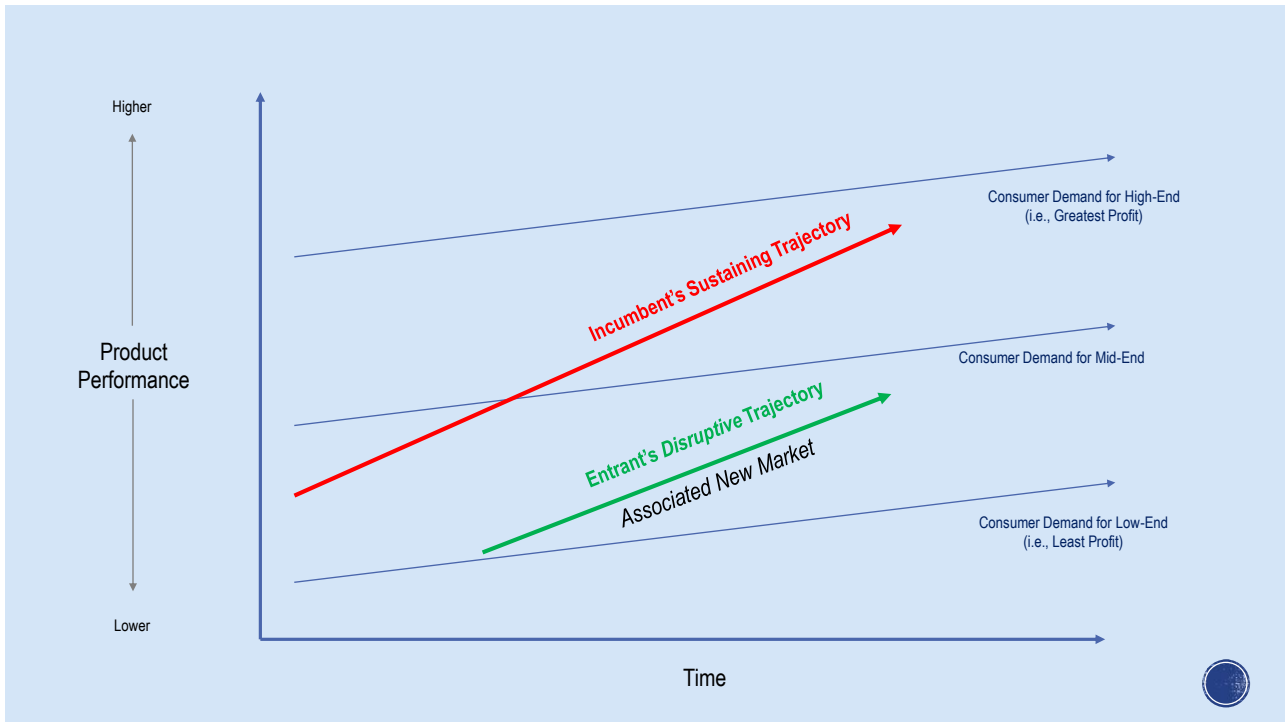


Patient Care



# DISRUPTION DEFINED





# HOW DOES MARKET DISRUPTION AFFECT THE PROFESSION...?

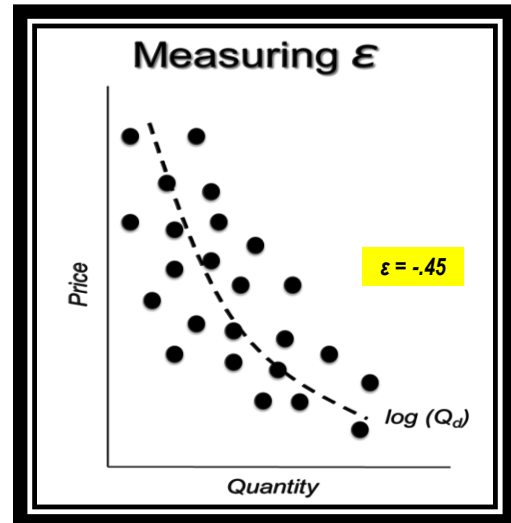
- The contemporary role of the hearing healthcare provider is deeply tied to technology (hearing aid devices and diagnostic equipment)
  - The cost of the disruptive technology will approach **zero** – this is an unsustainable business model given “*traditional*” business practices
- Creation of **new** market segments, several of which will require “*traditional*” business practices to re-think their:
  - Content and messaging
  - Create a new business case (i.e., service-based)
  - Value proposition (“hearing aids” vs. “improved QOL”)
  - Pricing



# DEMAND AND HEARING AID MARKET

- Demand function ( $\epsilon$ ), overall, within the hearing aid market is inelastic (Aaron, 1987; Lee & Lotz, 1998; Amlani & De Silva, 2005; Amlani, 2010)

- Elastic demand means that consumers are price sensitive (i.e.,  $\epsilon > |1|$ )
  - Appreciable decline in quantity sold when price is increased
  - Appreciable increase in quantity sold when price is decreased
- Inelastic market means that consumers are not price sensitive (i.e.,  $\epsilon < |1|$ )
  - No appreciable decline in quantity sold when price is increased
  - No appreciable increase in quantity sold when price is decreased

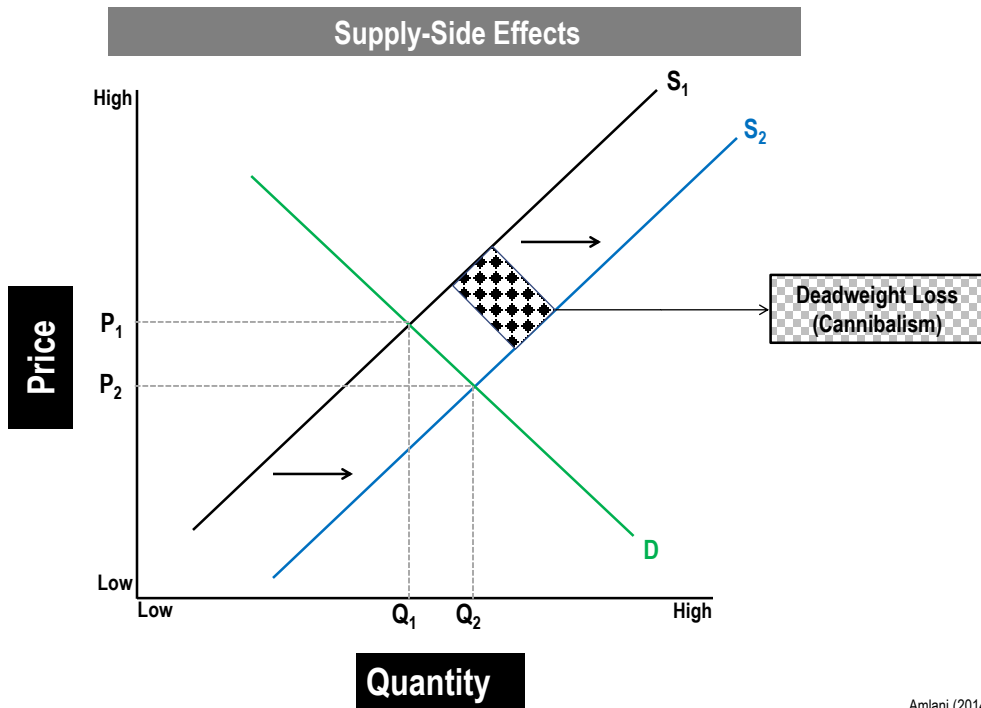


$$\text{Total Revenue} = \sum (\text{Price}_i \times \text{Quantity}_i)$$

Demand	Raise Prices	Reduce Prices
Elastic	Total Revenue Decreases	Total Revenue Increases
Inelastic	Total Revenue Increases	Total Revenue Decreases

Amlani (2008)

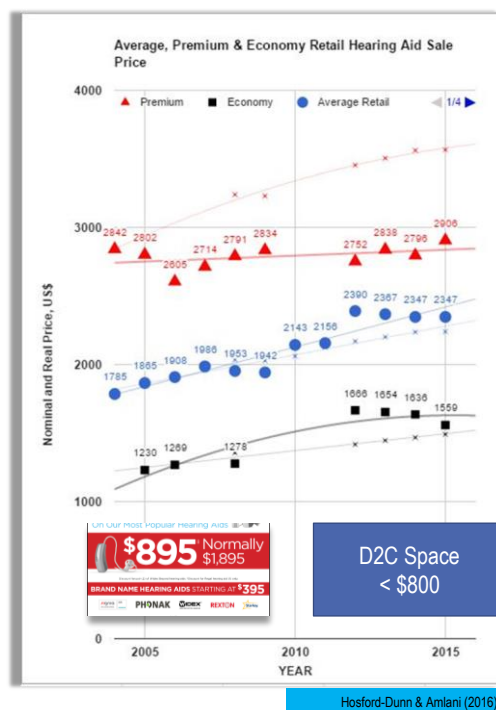
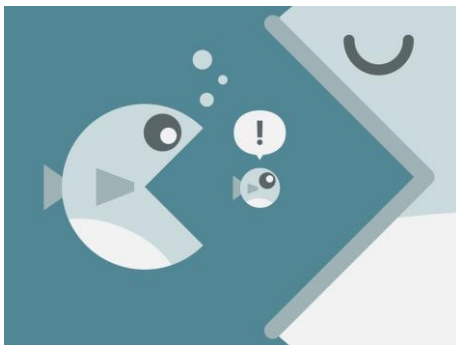
*Caveat: Over-charging is not being advocated. Over-charging for a product or service can result in no gain or a loss in revenue and in perceived value of the provider and practitioner.*



Amlani (2014)



## CANNIBALIZATION



Hosford-Dunn &amp; Amlani (2016)





## THE HearingReview

NEWS PRODUCTS BUYER'S GUIDE RESOURCE CENTER BLOGS

BLOG

### The Need for Standards in Audiology

Published on February 18, 2019



Opinion | March 2019 *Hearing Review*

Why up-to-date practice standards for the profession of audiology are necessary

By John A. Coverstone

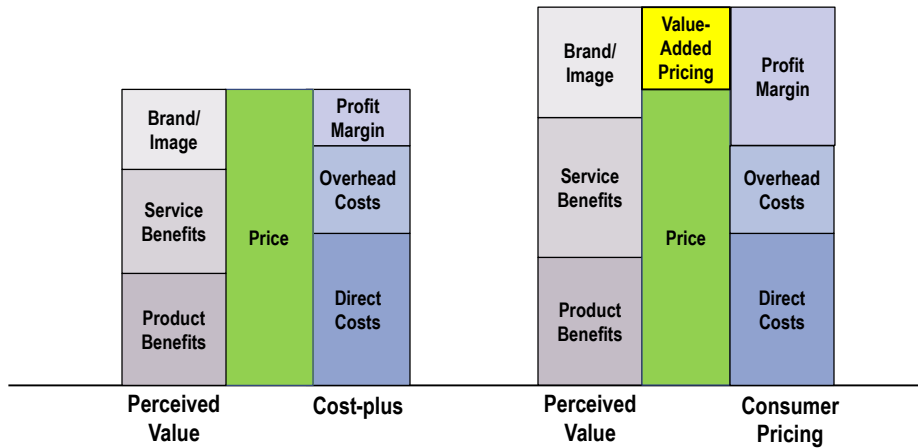


**Cost-Plus Pricing**

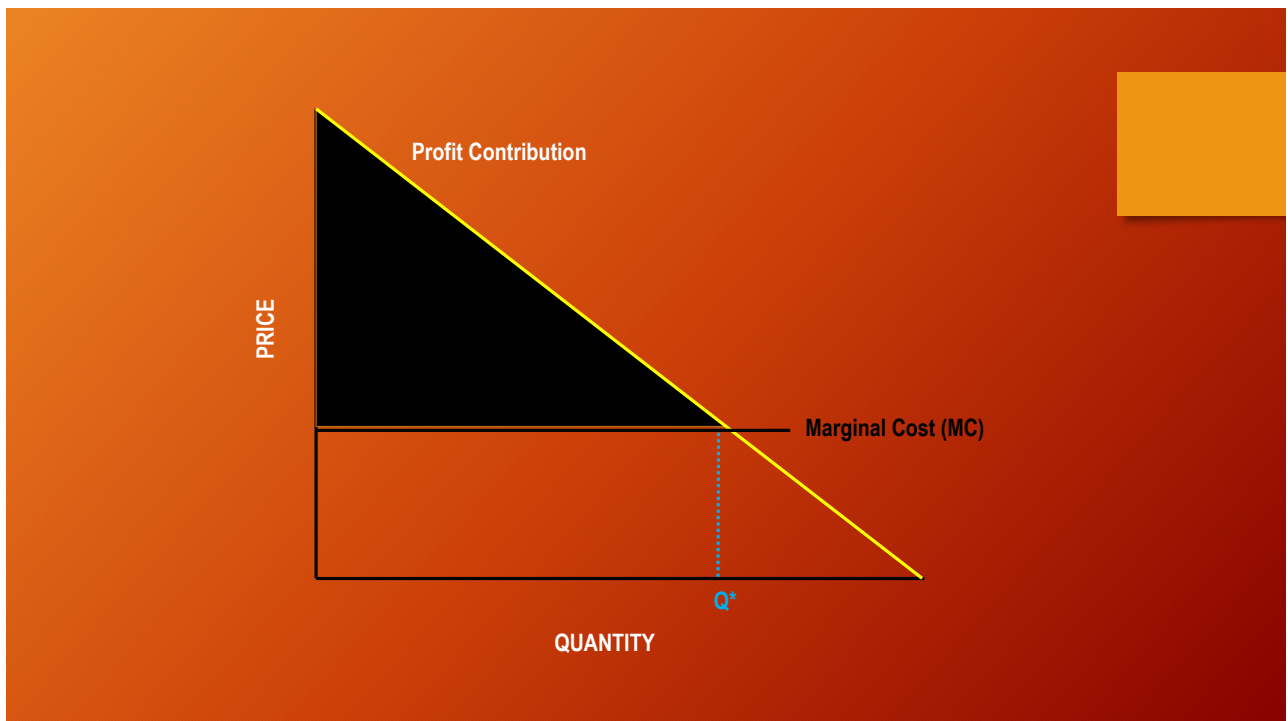
The selling price is determined by adding a specified markup to a product's unit cost

**Value-Based Pricing**

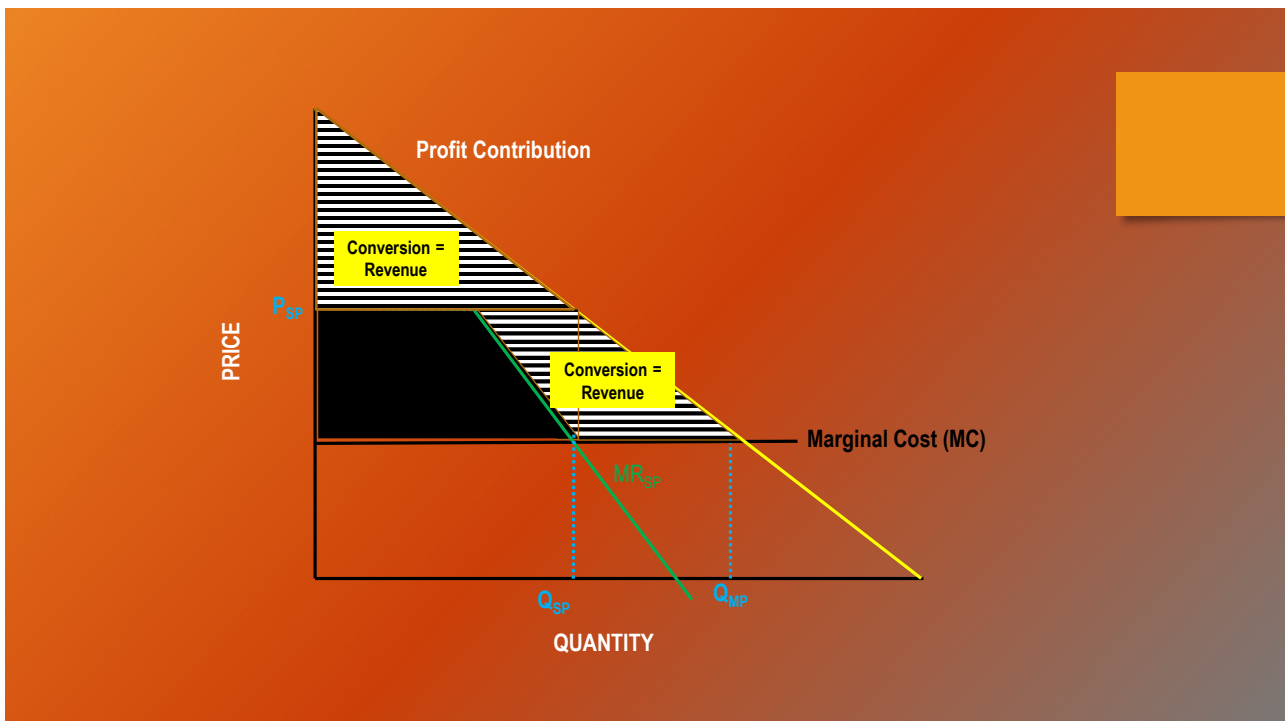
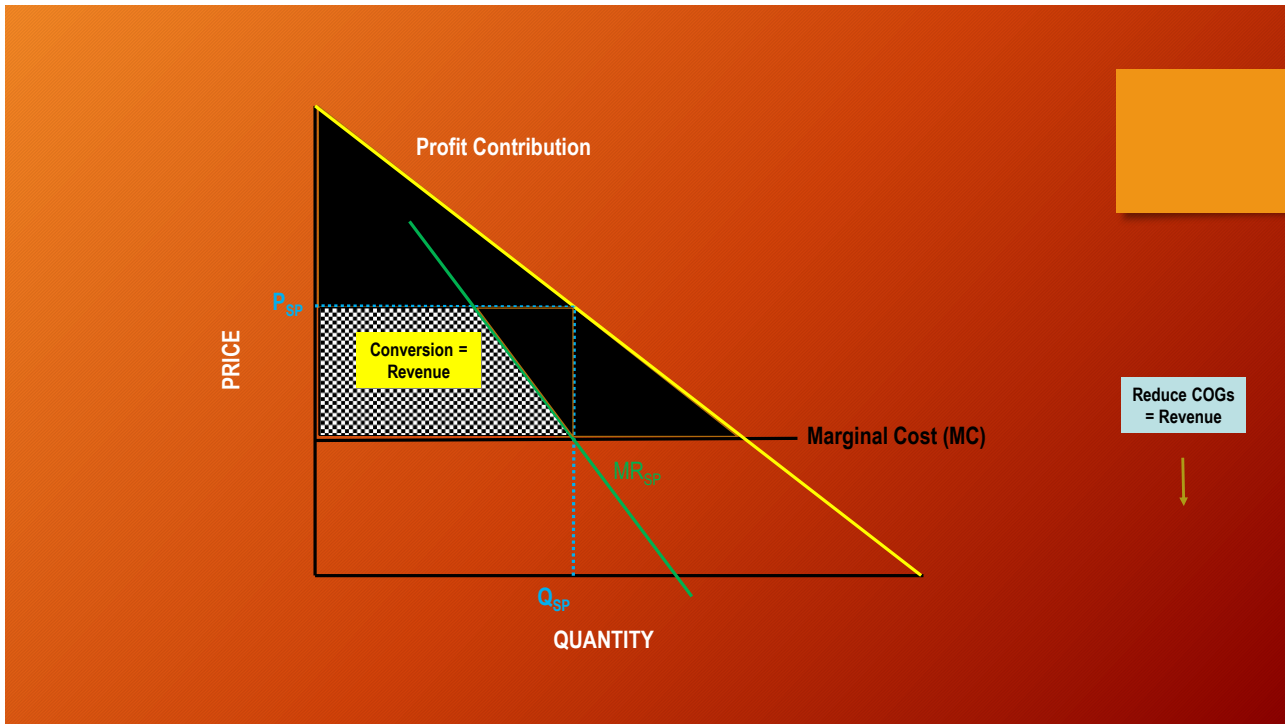
The selling price is based on the service and product benefits perceived



Amlani (2019)







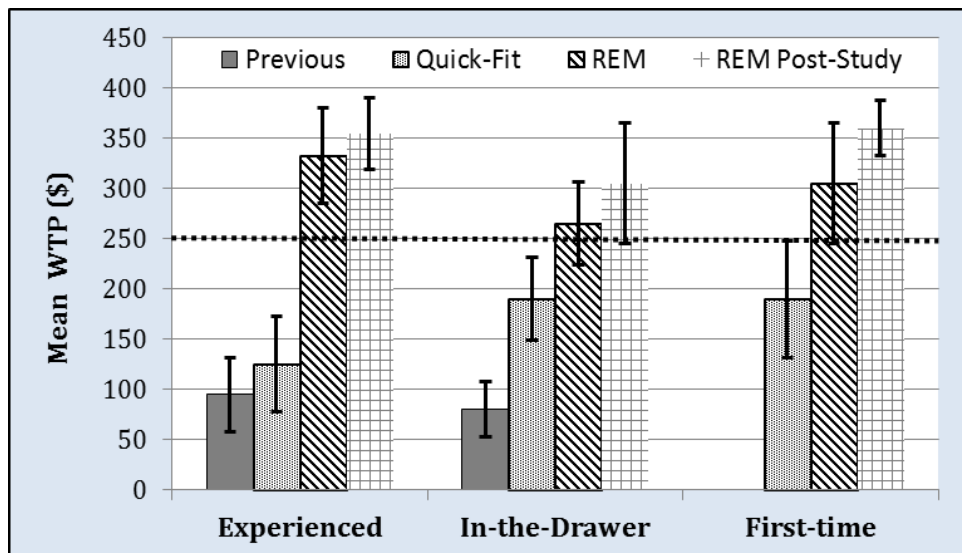
The *difference* is



## HOW DOES MARKET DISRUPTION AFFECT THE PROFESSION...?

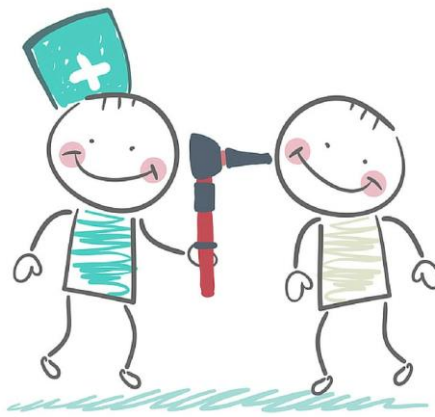
- The contemporary role of the hearing healthcare provider is deeply tied to technology (hearing aid devices and diagnostic equipment)
  - The cost of the disruptive technology will approach **zero** – this is an unsustainable business model given “*traditional*” business practices
- Creation of new market segments, several of which will require “*traditional*” business practices to re-think their:
  - Content and messaging
  - Create a new business case (i.e., service-based)
  - Value proposition (“hearing aids” vs. “improved QOL”)
  - Pricing





Amlani et al (2016)

## ADDING VALUE TO THE PATIENT EXPERIENCE



# SYSTEMATIC REVIEWS



*Models of behaviour –  
psychological  
determinants of change  
at the level of the  
individual*



*Theories of change –  
how behaviour can  
change over time*



*Frameworks for behavioural change – how to influence  
behaviour change in a target group or population*

## MODELS/ THEORIES OF HEALTH BEHAVIOR



## Review Article

## Applying theories of health behaviour and change to hearing health research: Time for a new approach

Neil S. Coulson<sup>1</sup>, Melanie A. Ferguson<sup>2</sup>, Helen Henshaw<sup>2</sup> & Eithne Heffernan<sup>2</sup><sup>1</sup>Division of Rehabilitation and Aging, School of Medicine, Queen's Medical Centre, University of Nottingham, Nottingham, UK and <sup>2</sup>National Institute of Health Research, Nottingham Hearing Biomedical Research Unit, Nottingham, UK

In summary, the evidence for the predictive capabilities of the HBM is arguably weak, particularly when considered in relation to other models (i.e. Theory of planned behaviour / Theory of reasoned action). There are likely to be a range of reasons that include (but not limited to), inadequate construct definition and measurement, lack of clarity with regards how the various components should be combined to predict behaviour, and weaknesses in the predictive validity of the HBM's key components (Armitage & Conner, 2000).

In summary, whilst the TTM has been the focus of a considerable amount of research attention it has also received unprecedented levels of criticism, with some authors (e.g. West, 2005) arguing that we should abandon the model completely. The vast majority of this criticism has been levelled at the 'stages of change' construct within the model, arguing that these stages are in fact 'pseudo stages'.

## HEALTHCARE JOURNEY

## RETAIL JOURNEY

**TODAY'S IMPAIRED LISTENERS DO NOT VIEW DECREASED HEARING SENSITIVITY AS A MEDICAL CONDITION, BUT AS A CONSUMER DECISION**

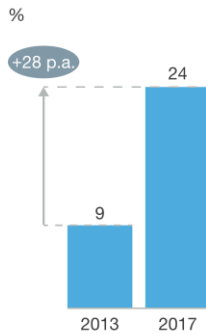
**(THAT IS, NOT A CHANGE IN BEHAVIOR, BUT THE NEED FOR A STRATEGY TO OVERCOME A STATE)**



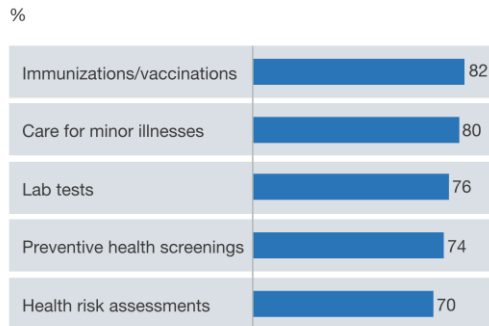


## Retail clinic use is steadily growing

### Consumers who report using retail clinics



### Consumers willing to seek various types of care at a retail clinic



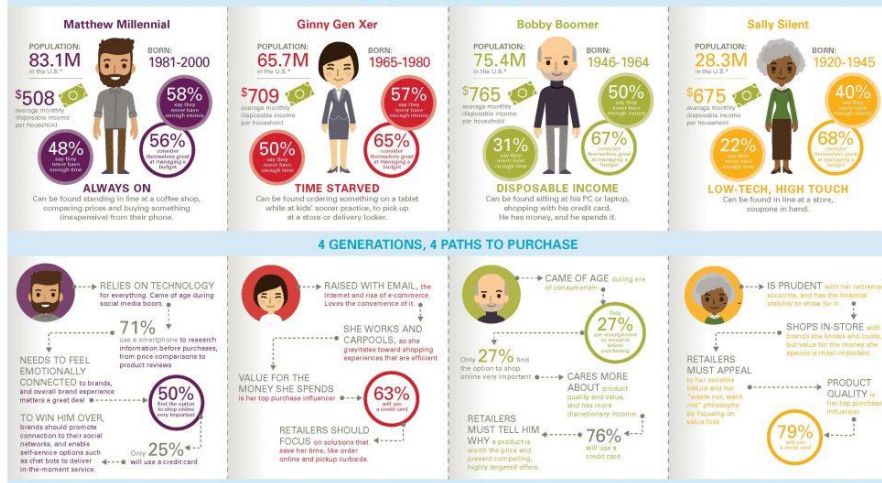
p.a., per annum.

McKinsey&Company | Sources: McKinsey 2013 and 2017 Consumer Health Insight Surveys

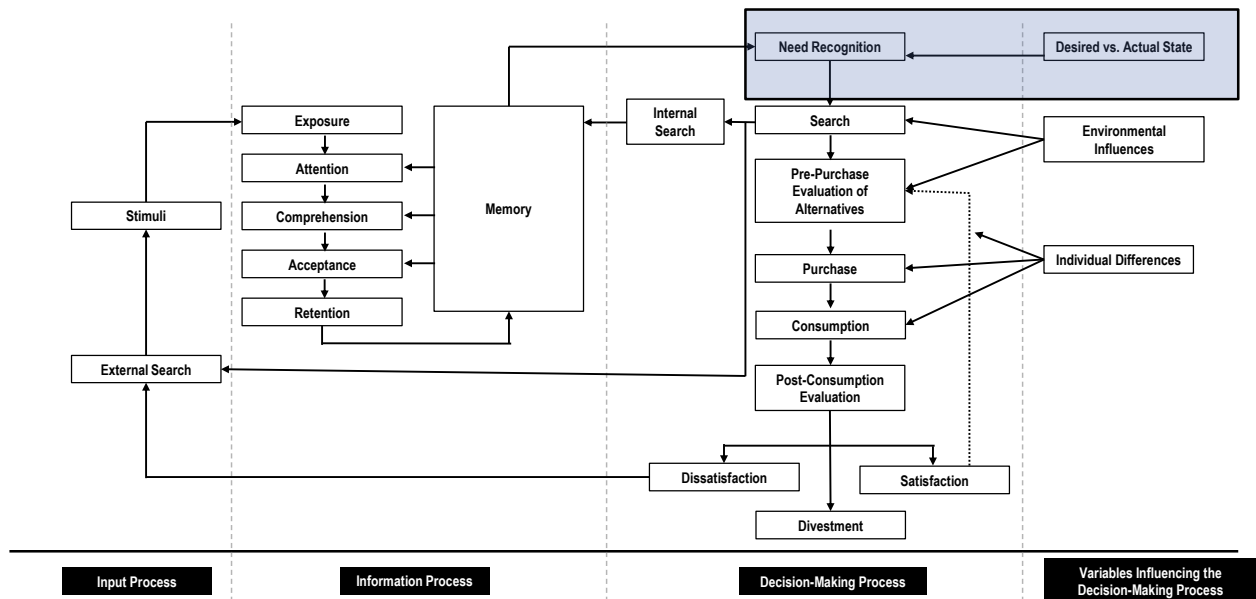
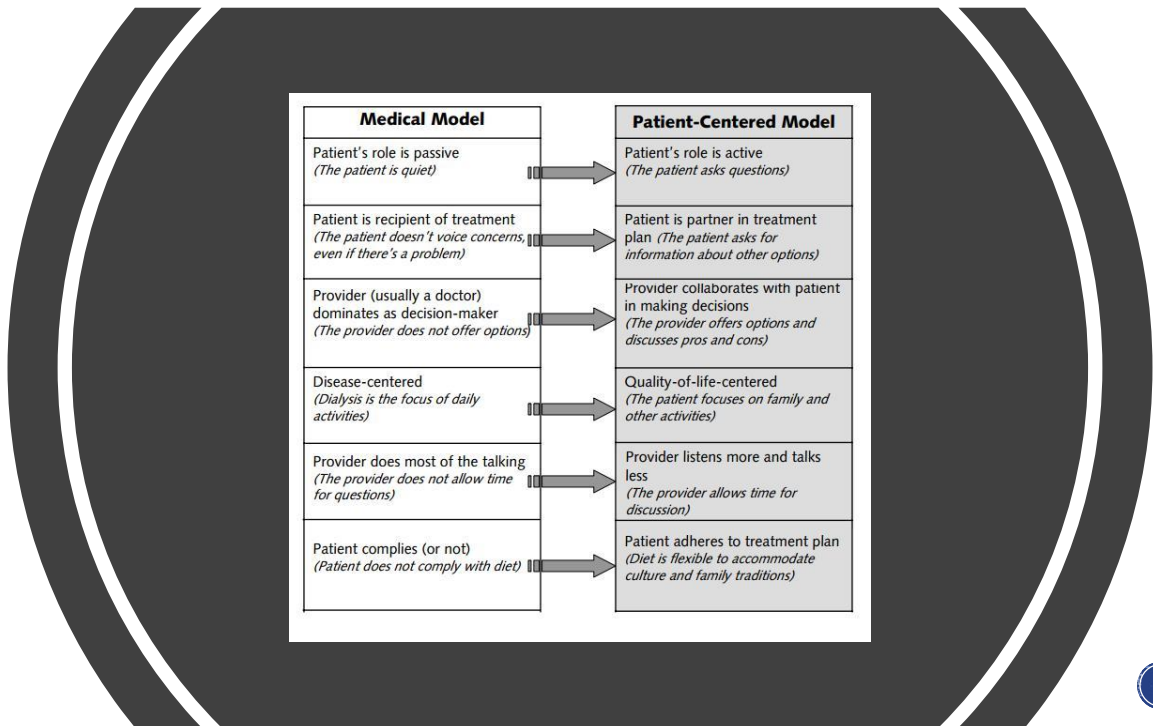


## LIFESTYLES AND LIFE STAGES ON THE PATH TO PURCHASE.

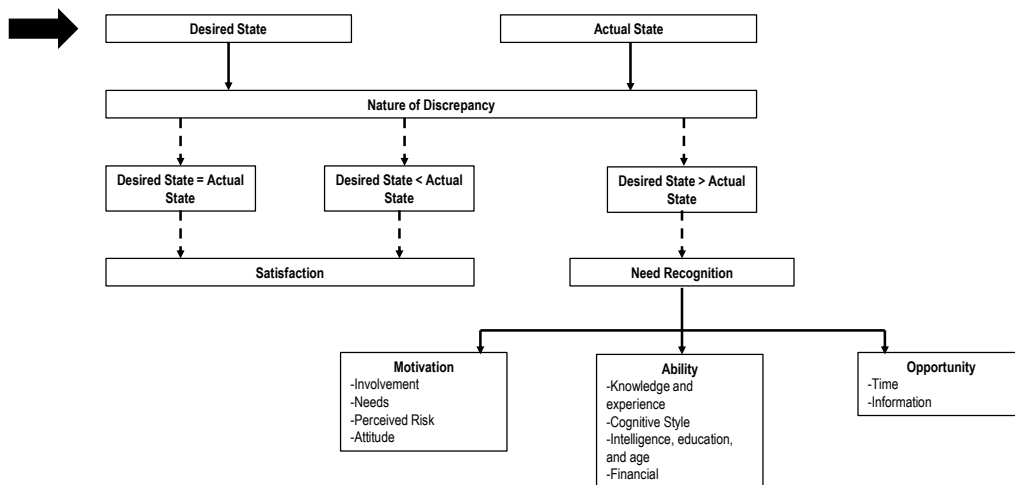
### A GENERATIONAL PERSPECTIVE



BASED ON 2017 RESEARCH FROM: AllianceData, AllianceData, LoyaltyOne, EPSILON



Consumer Decision Model (Blackwell et al, 2001)...*Consumer Behavior* (Book)  
Amlani (2015)...*Seminars in Hearing*



Need Recognition

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## CONSUMER DECISION MODEL - METHODOLOGY

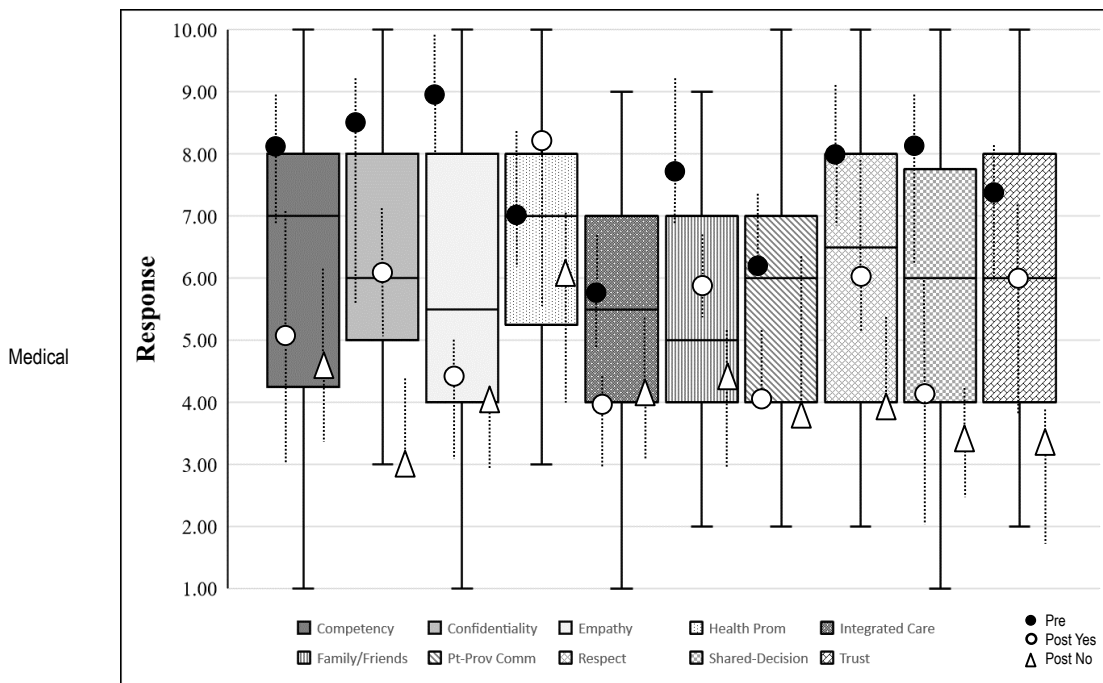
- 618 adult listeners completed online questioning
  - Females = 426 (Mean = 58.4 years; SD = 6.2)
  - Males = 186 (Mean = 63. years; SD = 5.3)
- Survey open from October 2015 – December 2016
- Participants completed the survey twice:
  - Pre-appointment = desired (i.e., what was expected)
    - Survey requested to be taken within 14 days of appointment (Mean = 7.6, SD = 3.8)
  - Post-appointment = actual (i.e., what was received)
    - Survey requested to be taken within 14 days of appointment (Mean = 3.3, SD = 2.1)

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**Q1. In your opinion, a hearing healthcare provider is best classified under the heading of (a) medical, (b) rehabilitation, or (c) consumer electronics?**

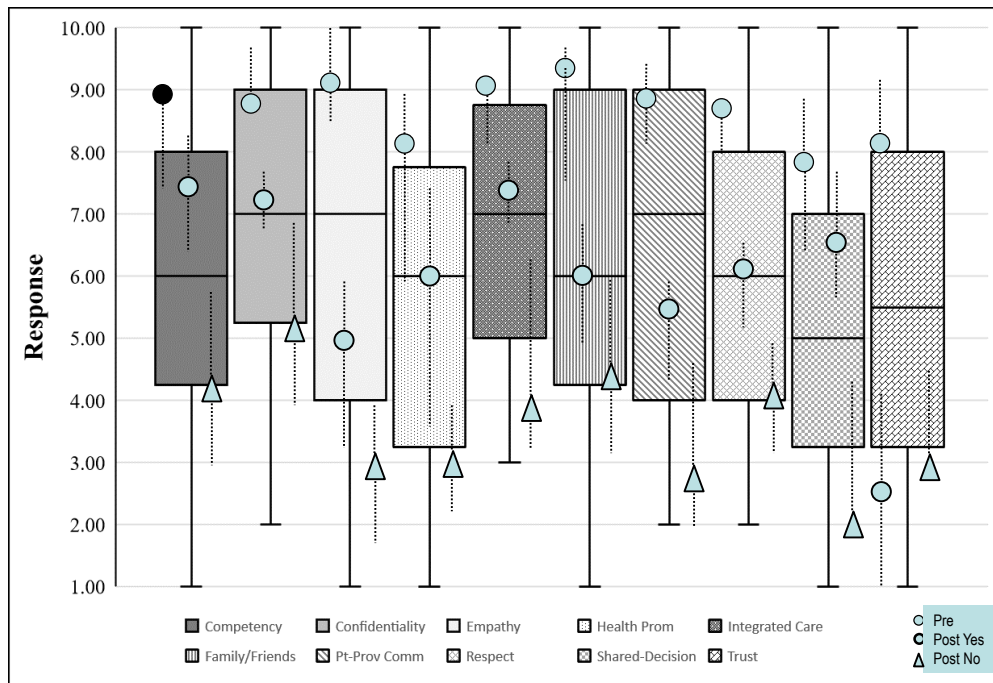
"Perceived" Provider Seen	Sample Size (n)	Interest in Amplification
Medical	142	95
Rehabilitation	389	187
Consumer Electronics	87	72



Amlani (in review)



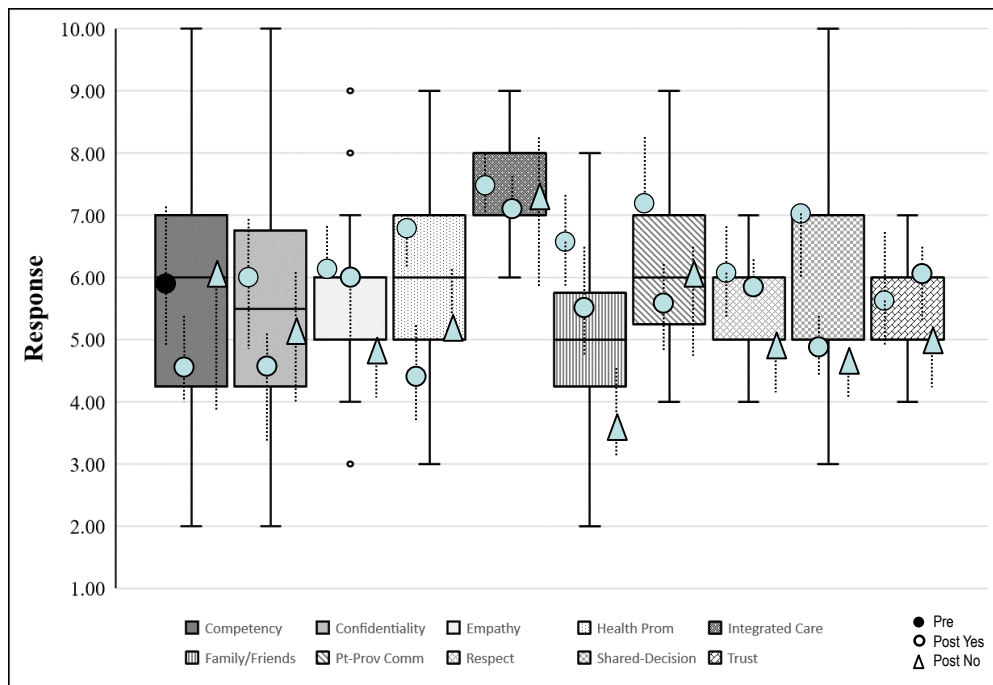
Rehab



Amlani (in review)



CE



Amlani (in review)



	Medical (n = 142)		Rehabilitation (n = 389)		Consumer Electronics (n = 87)	
Respondent Perception	Pre	Post	Pre	Post	Pre	Post
Receptive towards Treatment	142	50	389	173	87	64
Apathy towards Treatment	0	92	0	216	0	23
Receptive towards Amplification	95	36	187	29	72	49
Apathy towards Amplification	47	40 (7 changed minds)	202	197 (5 changed minds)	15	4 (11 changed minds)

Amlani (in review)

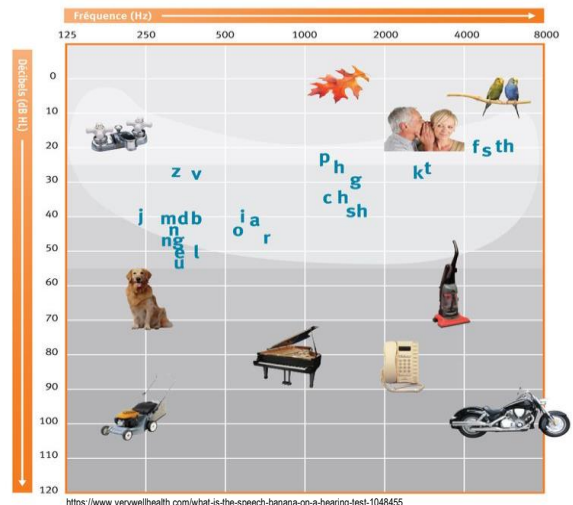
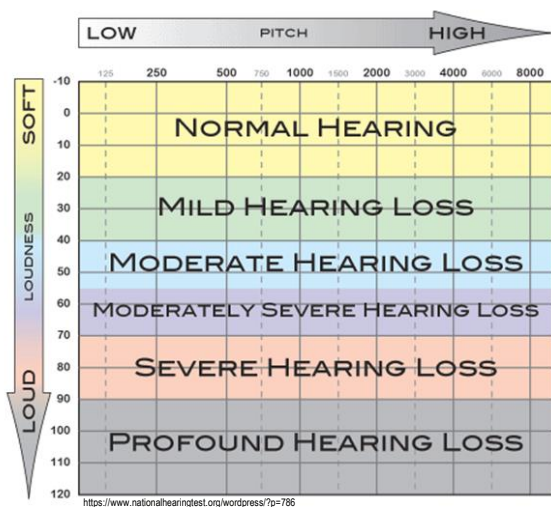


# Social Sense

- Change in Terminology  
-Hearing Difficulties vs “Hearing Loss”
- Hearing Evaluation Perceived as “Pass” or “Fail”  
-Acknowledge difficulties, provide solution
- Being Empathetic  
-Patients demonstrate high levels of anxiety



**Curtis Alcock**

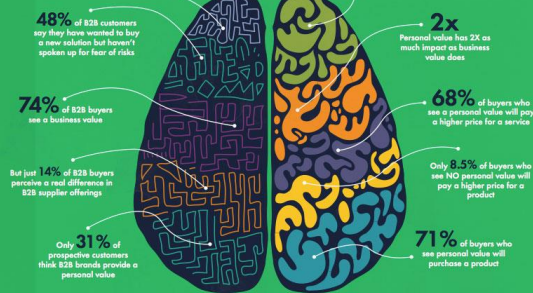


**Includes:**

- 100% Digital Signal Processing
- 3 Environmental Listening Programs
- Automatically Increases Soft Sounds and Reduces Loud Sounds
- Reduces Background Noise
- Reduces Listening Effort
- Reduces Whistling
- One-Year of Fitting Adjustments
- Two-year Repair and Loss Warranty

**Includes:**

- 100% Digital Signal Processing
- 3 Memories
- 12 Channels, 8 Bands
- Independent Wide-Dynamic-Range Compression
- Adaptive Directionality
- Adaptive Noise Reduction
- Adaptive Feedback Control
- Professional Fee
- Two-Year Manufacturer's Warranty

**HOW EMOTION INFLUENCES B2B BUYING****Business Value vs Personal Value**

In B2B buying, emotions matter even more than logic and reason.

DATA SOURCE: <http://www.nasacivibeard.com/related-resources/content/b2b-emotion/pd/brand-emotion-whitepaper-full.pdf>

People don't buy for logical reasons. They buy for emotional reasons.

Zig Ziglar

© Zig Ziglar



### Signs of Low Emotional Intelligence



Being Argumentative



Not Listening



Blaming Others



Emotional Outbursts

verywell



- Dominating speaking time
- Interrupting the patient
- Non-active listening
- Overemphasizing technical aspects of device care
- Inability to deal with emotion-alden aspects related to rehabilitation

(Ekberg, 2014; Grenness, et al, 2014; Grenness, et al, 2015; Knudsen, et, al., 2010; Laplante-Levesque, et al, 2014; Munoz, et al, 2014, and Munoz, et, al, 2015)



## Story Telling



communication  
partner



Bronze



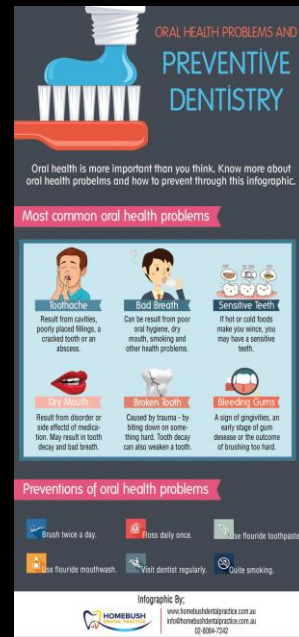
Gold



Universal

**SERVICE PACKAGES**





***“I’ve learned that people will never forget what you said, people will forget what you did, but people will never forget how you made them feel.” – Maya Angelou***





# SUMMARY

- Service provision is the key to success in the “*new*” hearing healthcare arena
  - Provide services that meet the needs of your *patient’s journey while* maintaining a *professional standard of care*
  - Avoid cannibalizing your efforts, including free hearing tests
- Strengthen your brand and market position based on the values of your patient’s needs
- **YOU** control your own fate



# THANK YOU

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Signia Expert Series:  
***Competing in Today's Disruptive  
Audiological Environment***

***Presented by Aryn Amlani, PhD***

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**Thank you!!!**