Findings from consumer survey
The purpose of the study was to understand the concerns, needs and motivational drivers of the experienced hearing instrument user.*

The Experienced User Insights study was carried out in the spring of 2010 in co-operation with DecisionLab.

**Guiding research questions:**

1. Which opportunities do Hearing Care Professionals have to build loyalty, activate and retain their clients.

2. Which opportunities do Hearing Care Professionals have to motivate and convert existing clients into purchasing their next hearing solution with them.

*In this study, an Experienced User is defined as a person who has been fitted with a hearing solution at least once and who is using it full time. When reference is made to other user groups, these will be people using their hearing solution occasionally, people who bought a solution but don’t use it and finally, people who have never used hearing instruments but have hearing difficulties.
DEMOGRAPHICS
KILLING MYTHS
ABOUT OLDER
HEARING INSTRUMENT
USERS
Experienced users are significantly older than people from any other user group...

...and 69% of them have retired
Not surprisingly, the largest number of people among Experienced Users (45%) are over age 65 (compared with the age of the other user groups). It is also no surprise that the largest number of retirees are within the Experienced User group.

This confirms our expectations - but it does not continue to be as logical.

The following pages highlight some potentially surprising news regarding demographic insights on Experienced Users.
More Experienced Users than any other group perceive themselves as being very or somewhat **socially active**!

A significantly larger group of Experienced Users perceive themselves as being more active when compared with any other user group.

The group of people over age 65 where there are the highest percentage of retirees, is also the group that perceives themselves as being most active.

This finding contradicts conventional pre-suppositions, but it confirms a strong trend of changing behaviour among the older generation.

This indicates an opportunity to address and support Experienced Users as people with an active lifestyle.
69% of Experienced Users are not living alone!

The fact that two in three Experienced Users are living with a communication partner indicates the importance of, and opportunity to:

1) Address topics of relevance to the communication partner in marketing and in counselling situations.

2) Involve the communication partner when present in counselling situations.
CONCERNS OF TODAY’S EXPERIENCED USERS REVEAL STRONG CONNECTION BETWEEN RATIONAL AND EMOTIONAL NEEDS
Experienced Users are accustomed to most of the practical, rational issues regarding wearing, cleaning, and maintaining hearing instruments. They know what to expect in terms of sound quality. This seems to leave them more space for emotional concerns.

Experienced Users are more interested than Pre-users in the technological issues, e.g., benefits, but this interest is emotionally motivated: “Will it help me to participate more?”

Many of the Pre-user’s emotional concerns persist in the experienced user.

*A Pre-user is a person who experiences hearing difficulties, but has never used a hearing instrument.*
Despite already owning, and wearing hearing instruments, Experienced Users still have rational concerns

What concerns do you have about your hearing?

<table>
<thead>
<tr>
<th>Concern</th>
<th>Experienced User</th>
<th>Occasional User</th>
<th>Stopped Using</th>
<th>Never Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can I afford to get hearing instruments?</td>
<td>26.9%</td>
<td>25.0%</td>
<td>32.1%</td>
<td>24.9%</td>
</tr>
<tr>
<td>Will it get worse if I don’t do something about it?</td>
<td>22.6%</td>
<td>29.2%</td>
<td>27.9%</td>
<td>37.3%</td>
</tr>
<tr>
<td>Can something be done?</td>
<td>22.6%</td>
<td>24.4%</td>
<td>28.5%</td>
<td>28.2%</td>
</tr>
<tr>
<td>I am not concerned. I think it is normal</td>
<td>18.6%</td>
<td>19.0%</td>
<td>16.4%</td>
<td>16.1%</td>
</tr>
<tr>
<td>That people will think I look old or handicapped if I wear hearing instruments</td>
<td>15.7%</td>
<td>17.3%</td>
<td>17.0%</td>
<td>10.8%</td>
</tr>
<tr>
<td>Will I be a burden to other people?</td>
<td>15.7%</td>
<td>14.3%</td>
<td>10.3%</td>
<td>5.3%</td>
</tr>
<tr>
<td>What should I do and where can I get information?</td>
<td>12.0%</td>
<td>13.1%</td>
<td>12.7%</td>
<td>15.4%</td>
</tr>
<tr>
<td>When should I seek help?</td>
<td>4.9%</td>
<td>11.9%</td>
<td>9.7%</td>
<td>23.4%</td>
</tr>
</tbody>
</table>

Experienced Users’ demands are driven by emotional needs

Which benefits do you find most important?

<table>
<thead>
<tr>
<th>Benefits</th>
<th>Experienced User</th>
<th>Occasional User</th>
<th>Stopped Using</th>
<th>Never Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hearing instruments that give me the most natural hearing possible - as nature intended.</td>
<td>59.6%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing instruments that help me to participate in conversations</td>
<td>47.4%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing instruments that make it less of an effort to listen</td>
<td>35.5%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing instruments that are as small as they can be and have the latest possible technology</td>
<td>27.1%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The ability to watch TV with others at the volume I need</td>
<td>24.9%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The ability to talk on the phone and hear the phone ring</td>
<td>24.4%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The ability to hear sound directly into both of my ears from my TV, landline and mobile phone, audio device like a music player and a personal computer</td>
<td>23.5%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing instruments that improve the sound quality when listening to music and watching a movie</td>
<td>17.5%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hearing instruments that are the smallest possible</td>
<td>17.7%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The benefits most appreciated and sought by Experienced Users are requests for technology to serve emotional needs.

For the Experienced User, a natural soundscape, ability to participate and effortless listening have high priority.
Experienced Users are more cost-conscious

What expectations did you have before your latest visit to the HCP?

<table>
<thead>
<tr>
<th></th>
<th>Experienced User</th>
<th>Never Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>I wanted to look around, see hearing instruments and check prices</td>
<td>33.6%</td>
<td>15.6%</td>
</tr>
</tbody>
</table>

Experienced Users are more concerned than Pre-users about value and price of hearing instruments.

Experienced Users are more than twice as likely to check and compare prices of hearing instruments when they visit the HCP.

Why did you visit more than one hearing care professional?

<table>
<thead>
<tr>
<th></th>
<th>Experienced User</th>
<th>Never Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>I wanted to compare prices on hearing instruments</td>
<td>54.0%</td>
<td>22.6%</td>
</tr>
</tbody>
</table>

Similarly, twice as many Experienced Users as Pre-users visit more than one HCP to compare prices.

Experienced Users also need to be reassured and empowered

Whereas Pre-users are generally concerned about all aspects of becoming a hearing instrument user, and the issue of wearing hearing instruments in general, Experienced Users are more preoccupied with emotional issues.

Despite already owning, and wearing hearing instruments, Experienced Users continue to feel insecure and concerned (disempowered) about their hearing loss and the possibilities or implications of changing their current situation.

This indicates an opportunity for hearing care professionals to reinforce their position as experts who can empower the user and provide security.

Experienced Users view technology benefits in a more emotional context, particularly when it comes to the promise of more benefits, and the price/value assessment and prioritization of changing their current situation.

This indicates an opportunity to tie specific life quality improvements to incrementally higher costs of hearing instruments.
What expectations did you have before your latest visit to the hearing care professional?

<table>
<thead>
<tr>
<th>Expectation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I wanted to look around, see hearing instruments and check prices</td>
<td>33.6%</td>
</tr>
<tr>
<td>To get general information about hearing difficulties and implications</td>
<td>19.8%</td>
</tr>
<tr>
<td>To get information about specific hearing instruments</td>
<td>18.6%</td>
</tr>
<tr>
<td>To talk to someone who understands what I am experiencing</td>
<td>20.4%</td>
</tr>
<tr>
<td>To get general information about the benefits of hearing instruments</td>
<td>33.0%</td>
</tr>
<tr>
<td>To satisfy other people e.g. my family who asked me to contact a hearing care professional</td>
<td>15.0%</td>
</tr>
</tbody>
</table>

Expectations before the latest visit to the HCP were both rational and emotional.

Experienced Users are interested in a mix of information about product improvements, and advice and guidance on making a change to their current situation.

This indicates an opportunity for hearing care professionals to share new possibilities in technology, service or other, and to reinforce their position as experts who can provide security, confidence, and good advice as a life quality provider.
EASY TO INTEREST – CHALLENGING TO PLEASE!
Experienced Users take a continuous interest in improving their hearing in key areas

Which hearing difficulties do you experience?

- Difficult to follow conversation in noisy situations: 68%
- Difficult to understand what people say: 42%
- Must really concentrate to hear someone talk or whisper: 31%
- Difficult to hear or understand the television: 28%
- Feel that people are mumbling: 13%

How do these experiences affect you?

- I need to ask people to repeat themselves: 66%
- I don’t always understand questions correctly: 28%
- I need to use extra energy to compensate: 27%
- I get annoyed with myself: 24%
- I tend to withdraw in social situations: 18%
- I’m told that I cannot hear: 15%
- I get embarrassed: 14%
- I don’t feel competent, in control or confident: 8%

Improvements most likely to encourage an upgrade

- Nearly two thirds want to hear more clearly in noisy situations.
- Nearly half want better sound quality.
- Nearly one third want hearing instruments that are as small as they can be with the latest possible technology.
- Nearly 1 in 4 would like less listening effort.
- Nearly 1 in 4 would like the higher ability to link to communication devices.
- 1 in 5 would like more discrete or stylish hearing instruments.
Communicate benefits!

Experienced Users have chosen to do something about their hearing difficulties because they have been negatively affected by their experiences. Even though they benefit from, and have built experience in using hearing instruments, a relatively large share of them continue to seek improvements.

This indicates opportunities, in both marketing and counselling, to communicate new benefits in the key areas troubling Experienced Users the most.

More than half of Experienced Users would contact a Hearing Care Professional if they were offered a free trial of hearing instruments and/or a free hearing test.

What kind of offerings would make you contact a hearing care professional?

<table>
<thead>
<tr>
<th>Offering</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get a risk free trial of hearing instruments</td>
<td>51.0%</td>
</tr>
<tr>
<td>Get a two week, risk free trial of hearing instruments</td>
<td>50.7%</td>
</tr>
<tr>
<td>Get a free hearing test</td>
<td>50.4%</td>
</tr>
<tr>
<td>Book a free appointment with an expert</td>
<td>39.0%</td>
</tr>
<tr>
<td>A special offer</td>
<td>30.7%</td>
</tr>
<tr>
<td>Invitation to product demonstration</td>
<td>25.8%</td>
</tr>
<tr>
<td>Contact us to go through your options and get good advice and guidance</td>
<td>19.1%</td>
</tr>
<tr>
<td>Invitation to open-house event</td>
<td>15.0%</td>
</tr>
<tr>
<td>Participate in an event for people with difficulties hearing</td>
<td>10.2%</td>
</tr>
</tbody>
</table>

When compared to any other user group, Experienced Users are significantly more interested in being updated on the benefits of product improvements and new solutions.

This indicates an opportunity to use conventional offers to incentivise Experienced Users to contact you to make an appointment.
Almost every fourth Experienced User did not buy a hearing solution at the first visit because their needs and expectations were unmet. The opportunity to have a free trial is a positive key driver of why people did not buy at the first visit.

In less positive cases, building trust can play a key role in minimising the need for a second opinion and ensuring that they come back to you to make the purchase.

Why didn’t you buy at first visit?

- I wanted more information: 31.2%
- I realized that getting hearing instruments is more expensive than I thought: 30.5%
- It was too expensive: 24.7%
- I wanted a second opinion: 17.5%
- I wanted to discuss the decision with my relatives, friends etc.: 15.6%
- I didn’t have a chance to try any of the hearing instruments: 11.0%
- I didn’t believe that hearing instruments would give me any significant improvements: 5.2%

Why did you visit a second HCP?

- I wanted to have a second opinion: 56.8%
- I wanted to compare prices on hearing instruments: 54.0%
- The hearing care professional didn’t have the hearing instruments I wanted: 13.6%
- I didn’t like the atmosphere in the clinic: 9.7%
- I didn’t feel they understood my needs and concerns: 8.5%
- The staff didn’t seem competent: 4.0%

More Experienced Users are created by exceeding expectations.

Please evaluate your experience with the consultation from your visit with the hearing care professional.

Gave me the feeling that I could trust them
Gave me the time I needed to talk about what I am experiencing
Listened and understood my needs and concerns
Gave me the time I needed
Was not pushy
Explained my options well and their benefits clearly in relation to the costs
Gave me the option to try out the instruments
Showed interest in me and my life beyond my hearing loss
Gave me the information I needed about hearing and the symptoms of hearing loss in general
Allowed me to try different instruments before making a decision

The opportunity to have a free trial is a positive key driver of why people did not buy at the first visit.

In less positive cases, building trust can play a key role in minimising the need for a second opinion and ensuring that they come back to you to make the purchase.
Exceeding expectations: from monologue to dialogue...

While many Experienced Users indicate that they had a good experience, those who bought on their first visit (54%) had a significantly better experience on all parameters than those who did not buy.

Today’s modern users require a more emotional connection with their hearing care professional. This is part of the strong current trend that the professional-client relationship is changing from monologue to dialogue.

Hearing care professionals must emphasize certain key parameters of service, if they are to exceed expectations and make a lasting, good impression:

- **Trust**
- **Empowerment**
- **Time**
- **Understanding**

- This indicates the importance of listening and understanding their needs and concerns.
- Giving them the time that they need.
- Being able to explain the price/value of products and service in a straightforward and trustworthy way.
- Keeping in touch regularly with prospective clients with opportunities customised to their individual needs.
WHAT YOU WANT IS WHAT YOU SEE...
We tested 6 communication directions in order to identify which tone of voice, images and key messages would most likely motivate the respondents to take action.

Is your hearing keeping you in isolation? Step out into a whole new world. Set yourself free. Nothing should hold you captive, not even hearing loss. Modern hearing solutions help improve your hearing in a natural way so you can reconnect with those around you.

Is your hearing keeping you in isolation? Step out into a whole new world. Set yourself free. Nothing should hold you captive, not even hearing loss. Modern hearing solutions help improve your hearing in a natural way so you can reconnect with those around you.

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We tested 6 communication directions in order to identify which tone of voice, images and key messages would most likely motivate the respondents to take action.

Be empowered
Modern hearing solutions are the key to restoring your equilibrium in life... and you are not alone with the problem.

Less effort
Modern hearing solutions are petite, discreet and effective...

Let’s communicate
Want to learn more? Call now to experience the difference with a risk free consultation and trial.
Which of these programs would you sign up to, in order to keep you updated on hearing, new insight and product improvements?

**Hearing reminder**
Sign up for our reminder service. You’ll receive an annual invitation for a free consultation and hearing test with your hearing care professional.

**Hearing test follow-up**
Sign up for our follow-up program and stay right up-to-date with your hearing. You’ll be able to see what is happening with your hearing, compare past test results and learn more about what products could be suitable for you.

**Hearing newsletter**
Sign up for our newsletter and stay informed about all the latest news on hearing, including information gained through our insights and user survey results, trends, product improvements and real-life user experiences.

Experienced Users like to stay updated on hearing related topics and to try new products for free
Every second Experienced User would sign up to a newsletter to stay informed about all the latest news on hearing, including information gained through insights, survey results, trends, product launches and real-life user experiences.

45% would sign up to a follow-up programme to stay up-to-date with their hearing, compare test results and learn more about which products could be suitable for them.

Every third Experienced User would find it interesting to receive reminders in the shape of an annual invitation for a free consultation and a hearing test.

The above more than indicates the opportunity to maintain the relation between the Hearing Care Professional and the Experienced Users through various types of database mailings containing the information they are looking for.
79% of Experienced Users use the Internet when searching for health related information

When searching for health related information, 4 in 5 Experienced Users use the Internet.

This indicates an opportunity to use the Internet as a medium, and to always have:

1) Updated information on the Internet.
2) Updated contact data on the Internet.

What kind of information do you find important when browsing websites?

<table>
<thead>
<tr>
<th>Information</th>
<th>Experienced User</th>
<th>Occasional User</th>
<th>Stopped Using</th>
<th>Never Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discover the possibilities</td>
<td>66.5%</td>
<td>58.0%</td>
<td>62.9%</td>
<td>45.2%</td>
</tr>
<tr>
<td>Explore our product range</td>
<td>51.0%</td>
<td>37.5%</td>
<td>50.6%</td>
<td>30.4%</td>
</tr>
<tr>
<td>Facts about hearing</td>
<td>37.7%</td>
<td>39.2%</td>
<td>36.5%</td>
<td>46.7%</td>
</tr>
<tr>
<td>Test your hearing</td>
<td>36.0%</td>
<td>40.3%</td>
<td>34.7%</td>
<td>57.7%</td>
</tr>
<tr>
<td>Consequences of an untreated hearing loss</td>
<td>28.8%</td>
<td>29.0%</td>
<td>26.5%</td>
<td>37.5%</td>
</tr>
<tr>
<td>Ask an expert or other users</td>
<td>19.7%</td>
<td>24.4%</td>
<td>24.7%</td>
<td>23.9%</td>
</tr>
<tr>
<td>Information about a manufacturer</td>
<td>18.0%</td>
<td>12.5%</td>
<td>11.2%</td>
<td>9.1%</td>
</tr>
<tr>
<td>The digital mirror</td>
<td>15.8%</td>
<td>15.3%</td>
<td>22.4%</td>
<td>15.9%</td>
</tr>
<tr>
<td>Make an appointment</td>
<td>15.5%</td>
<td>19.3%</td>
<td>11.2%</td>
<td>14.8%</td>
</tr>
<tr>
<td>User stories</td>
<td>11.1%</td>
<td>24.4%</td>
<td>19.4%</td>
<td>18.9%</td>
</tr>
</tbody>
</table>
**Research description**

**Survey**
Nearly 1,500 respondents ([361 Experienced Users](#)).
Web based survey with stimuli material (visuals, messages).
Respondents were recruited through local web panels in USA, Canada, Germany, France and Italy.

**Sample criteria**
Age 55+.
Experience hearing difficulties.
Wearing hearing aids full time.

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**Who did we talk too?**

**Facts about the Experienced User respondents**

- **Age:**
  The vast majority are **60 to 70** years old.

- **Sex:**
  60% are men and 40% are women.

- **Employment:**
  The vast majority are retired and **17%** are working fulltime.

- **Social activity:**
  42% are very active.
  36% are moderately active.
  22% are less active.
People First is our promise
to empower people
to communicate freely,
interact naturally and
participate actively