

**Findings from
consumer survey**



**Summary report
for first time users**

The purpose of the consumer survey was to gain valuable insights on how we should improve our consumer marketing system

Strategic question:

1

How do we attract more qualified leads to the hearing care professional?

This part focuses on identifying the most motivational tone of voice, images, claims and messages to arouse curiosity, trigger interest and drive traffic to the hearing care professional.

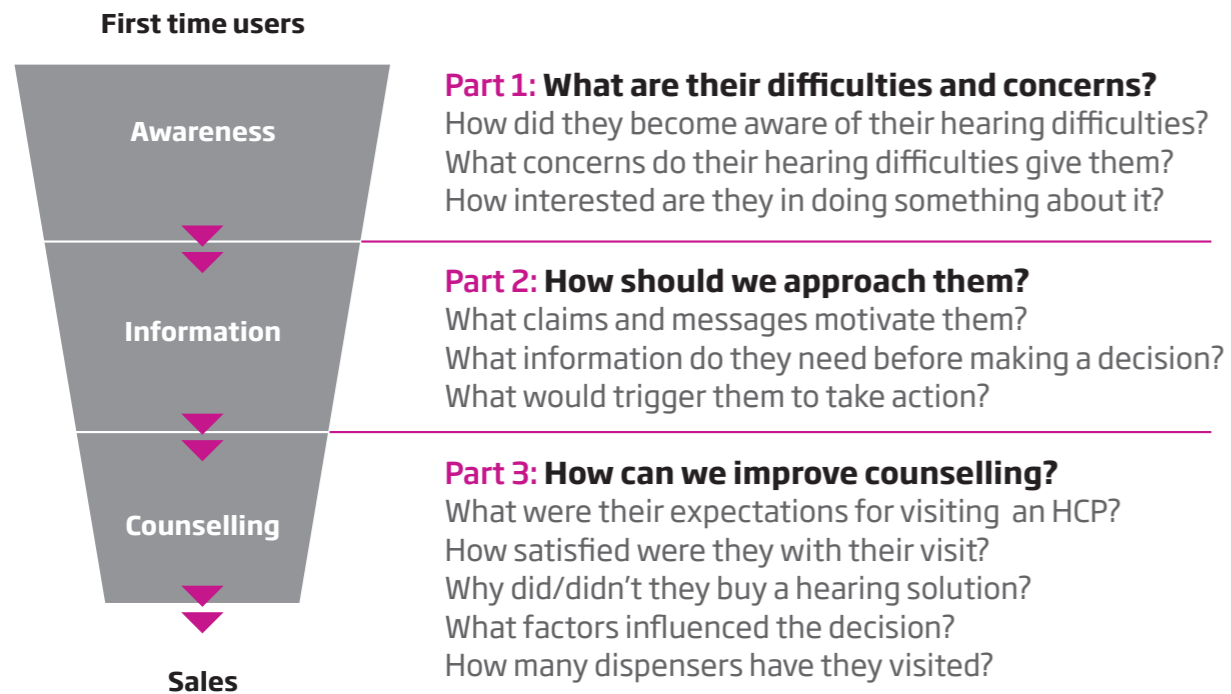
Strategic question:

2

How do we motivate and convert more leads into purchase?

This part focuses on identifying the reasons, throughout the end-user journey, that so many potential first time users drop out or return their hearing solution. This can help us answer how the end-user journey can be improved with activities and information to better educate, prepare and motivate potential first time users for a higher success ratio during the counselling process.

Test set-up



Research description

Survey

nearly 1,500 respondents (750 first time users)

Web based survey with stimuli material (visuals, messages)

Respondents were recruited through local web panels in US, CAN, GER, FRA and ITA

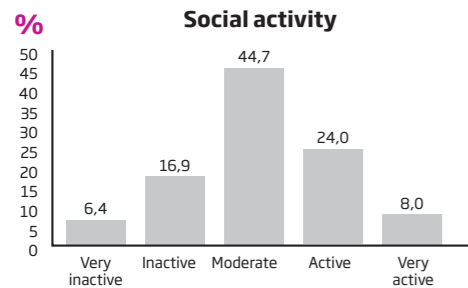
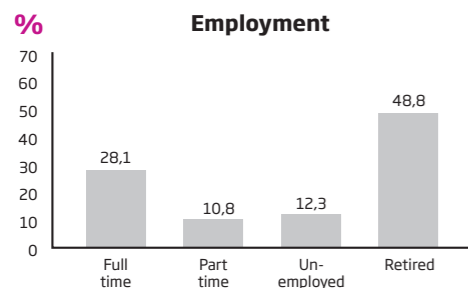
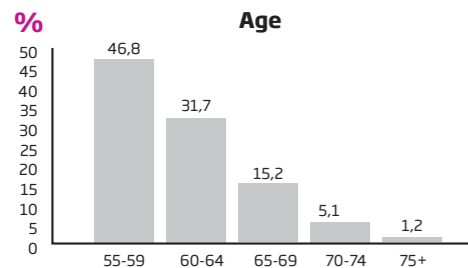
Sample criteria

Age 55+

Experience hearing difficulties

Never used a hearing device

Who did we talk too?



Facts about the respondents

Age:

The vast majority are between 55 and 65

Sex:

46% are women and 54% are men

Employment:

50% are retired and 30% are working full time

Social activity:

32% are very active

45% are moderately active

23% are less active

Findings part 1

What are their hearing difficulties and concerns?

People with hearing difficulties find it hard to follow conversations and must concentrate to hear people talk

Experienced hearing difficulties

60% find it difficult to follow conversations

41% must concentrate to hear someone talk/whisper

30% have difficulties understanding the television

29% have difficulties understanding what people say

This confirms our existing knowledge that understanding speech in noise is the most common problem. People become aware of it because they need to concentrate and therefore use extra energy to compensate for their hearing difficulties.

People are most affected by the need to ask others to repeat themselves

Effects:

70% need to ask people to repeat themselves

32% get annoyed with themselves

23% use extra energy to compensate

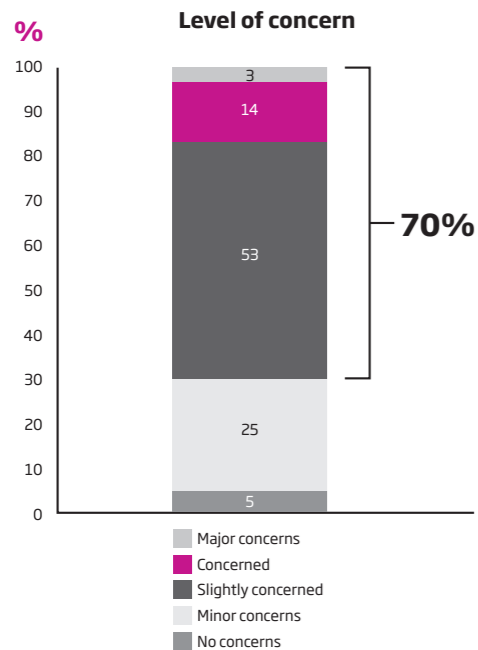
21% are told that they have hearing difficulties

20% answer incorrectly due to misunderstanding

18% get embarrassed with themselves

This confirms our knowledge that people with hearing difficulties become annoyed and embarrassed which, over time, can lead to negative social and psychological implications.

70% of the respondents are concerned that what they are experiencing is a problem



Areas of concern about their hearing

Is it a hearing loss? (30%)

Is it permanent? (23%)

Will it get worse? (37%)

Can something be done? (28%)

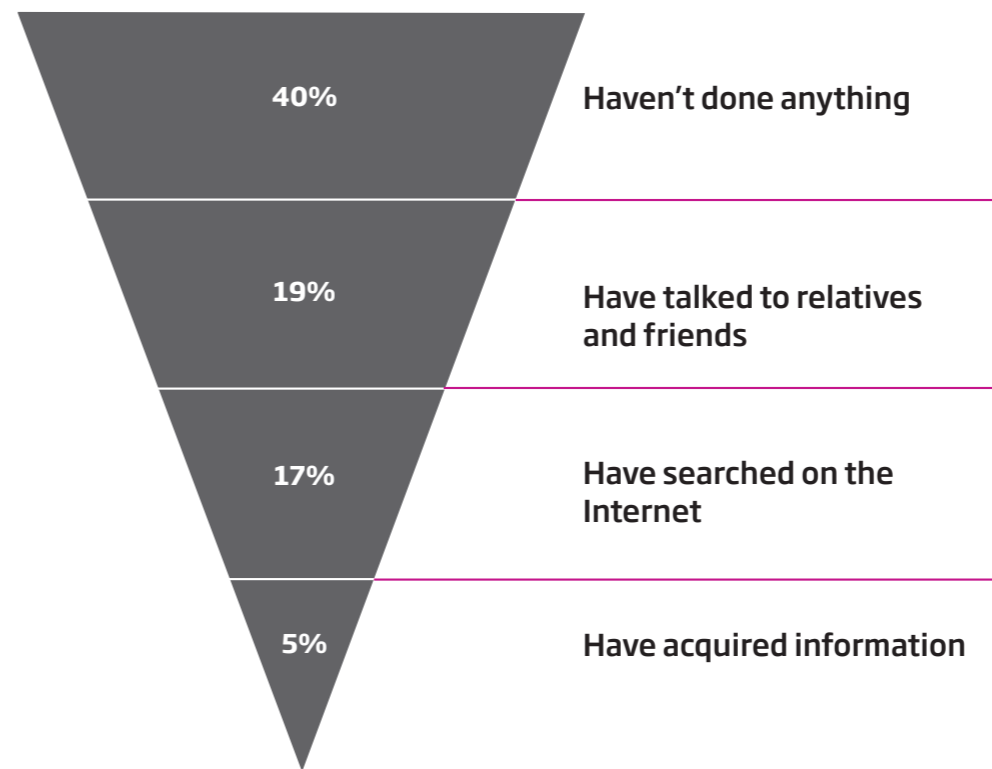
When should I seek help? (23%)

Where can I get more information? (15%)

Can I afford hearing instruments? (25%)

These areas of concern indicate that people have very little awareness and knowledge about hearing in general, and the symptoms and related implications of a hearing loss.

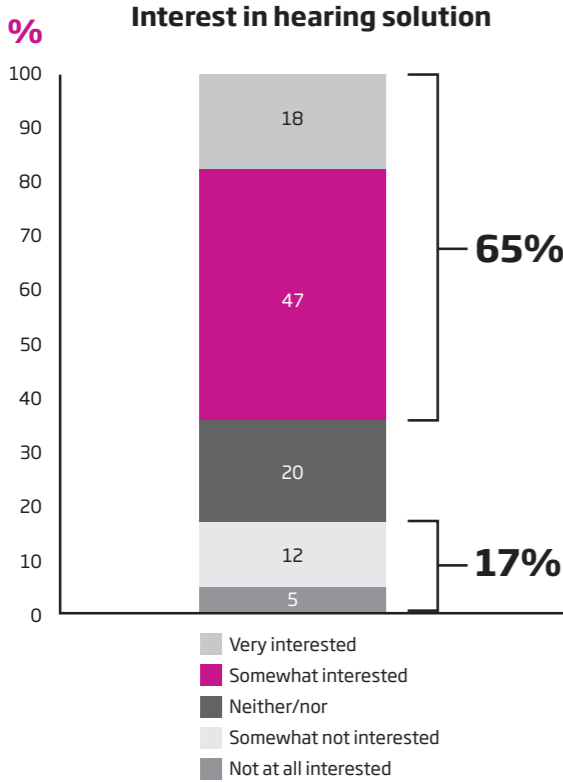
Even though people experience hearing difficulties and express concern about them, the majority still don't act...



While less than 20% of all people experiencing hearing difficulties are contacting a hearing care professional, 41% are in the process.

This indicates an opportunity for additional communication to further influence people at an earlier stage.

But when asked if they were interested in a solution to their hearing difficulties, 65% answered yes



If the concern and interest in a solution exists - then the challenge is to get those who are interested to act, and shorten their "time to visit"!

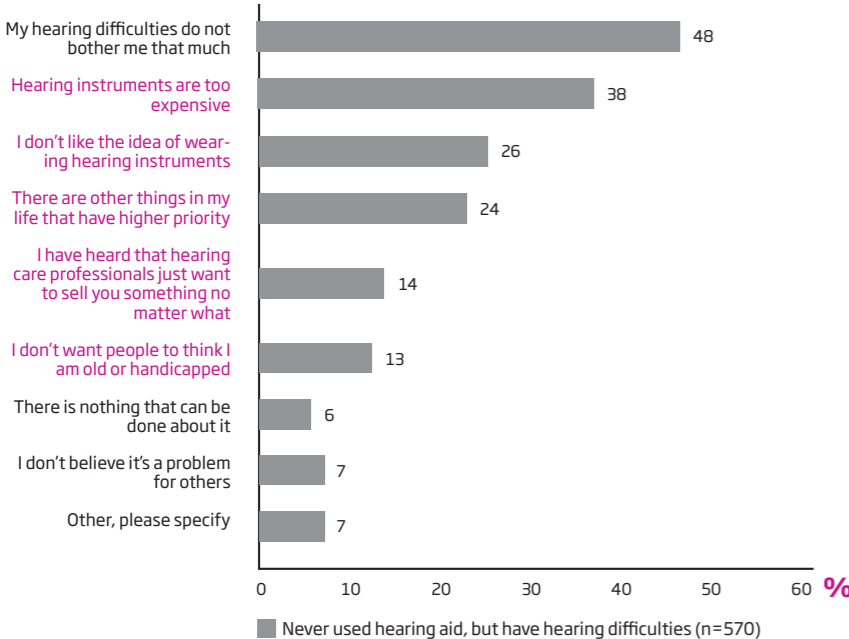
Findings part 2

How do we motivate those who are interested to contact an HCP?

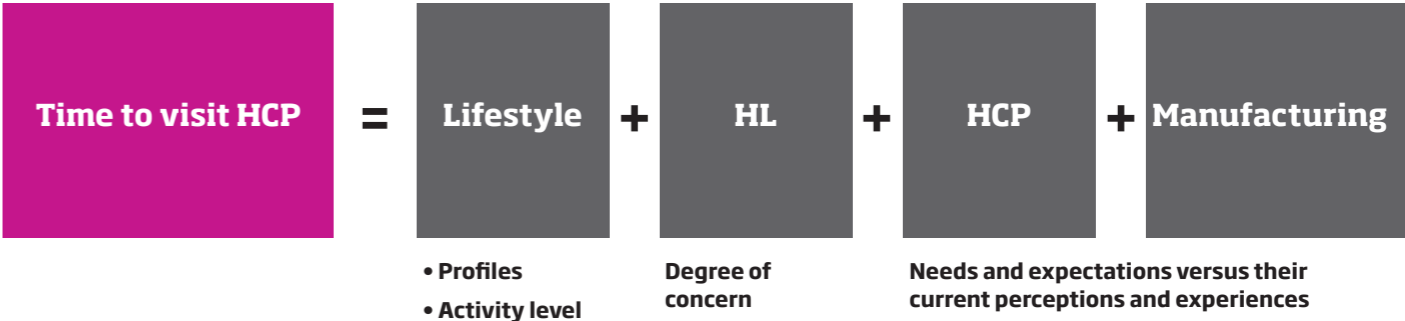
Manufacturers and HCPs have a unique opportunity to influence the main barriers to first contact

Have you ever considered contacting a hearing care professional but refrained from doing so because:

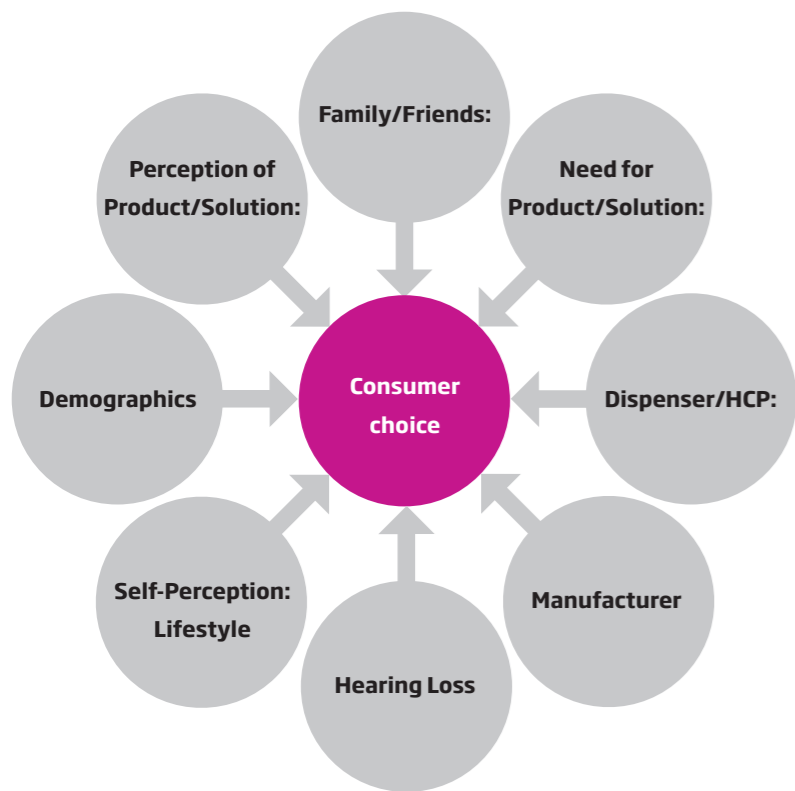
(never contacted or visited hearing care professional)



Time to visit is a combination of many concerns around the idea of fixing their problem and the associated costs



The specific drivers of choice that influence time to visit and purchase will be individual to each consumer



This indicates the need to uncover and influence these factors at key touch points in the end-user journey.

People in the pre-contemplation stage need guidance and empathy in order to take ownership for their hearing loss first, before they are ready to make a buying decision

Areas of concern:

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Their main expectations on their first visit are to learn, confirm and gain empathy

To check out if I have a hearing loss, and find out how serious it is

To get general info about hearing difficulties and implications

To talk to someone who understands what I'm experiencing

To satisfy my family or others who asked me to get my hearing checked

To confirm that I don't have a hearing loss

A large proportion of non users would like to receive information prior to their first consultation, YET...

...only 7% get it!

Nearly 1/4 did not buy because they did not get the information they needed (post hearing test)



This indicates the importance of preparing clients for the consultation to help manage expectations.

1/4 believed that the cost of hearing instruments was prohibitive



Pre-counselling activities could be an effective tool.

13% didn't believe that hearing instruments could provide any significant improvements

48% of respondents stated they would sign up to a mail program



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.



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 launches and real-life user experiences.

Relevant information:

Info about new solutions (57%)

Info about trends, possibilities and features (52%)

New insights about hearing and implications (47%)

Invitation to free consultation, hearing test and/or trial (45%)

Access to a self diagnostic tool to check their hearing from time to time (48%)

User stories and testimonials (24%)

This indicates that first time users want to keep the dialog open with hearing care professionals.

A regular mail program would be an effective tool to keep people in the "time for hearing" loop.

Approx. 75% of respondents use the Internet to search for healthcare-related information

Facts about hearing



Here you can learn about the ear and its vital role in hearing.

Consequences of an untreated hearing loss



The consequences of a hearing loss can be split into three categories; physical, physiological and social, and they all may have an effect on how you live your life. Learn about the consequences here.

Ask an expert or other users



Do you have questions about hearing loss - or do you want to help others, who may have? Share your thoughts and read what others have to say about life with a hearing loss.

User stories



Suffering from hearing loss can have different effects. Here you can read about 10 people who liberated themselves from the effects of their hearing loss.

Test your hearing



1 out of 10 people need a hearing instrument. You could be one of them. Get your hearing tested today and find out if you can improve your hearing.

Relevant information prior to a appointment:

Information about hearing, symptoms, what to be aware off etc. (48%)

A self diagnostic tool to check my hearing (48%)

Overview of possibilities and solutions (36%)

Possibility to interact with a professional (31%)

This could indicate that non-users also search for hearing-related information on the Internet.

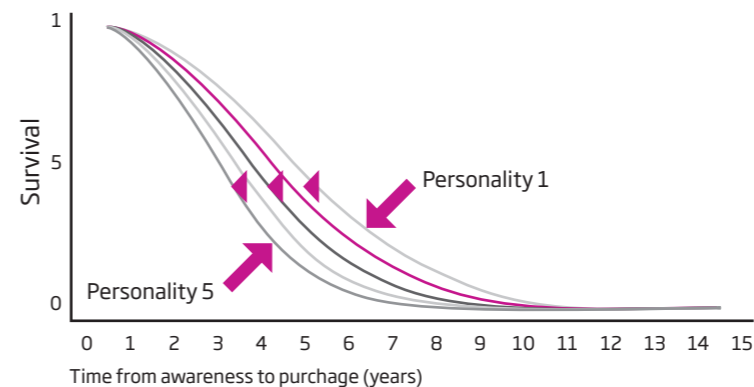
An end-user website with relevant information about hearing loss and guidance could be an important tool to direct non-users to hearing care professionals.

People who see themselves as being active are quicker to take ownership of their hearing loss

Survival model:

Weibull Regression - Change in personality
From inactive to very active

Weibull Regression - log relative hazard, n= 145, LL -121, LR chi2(34)= 172, Prob > chi2 = 0.000



q13personality=1 Least active
q13personality=2
q13personality=3
q13personality=4
q13personality=5 Most active

↓

This indicates the importance of uncovering how active people see themselves as being, and using this in communication.

Non-users evaluate the ability to participate actively, effortlessly and naturally as most important...



Benefits

Participate actively (44%)

Less effort (34%)

Discreet (29%)

Natural hearing (55%)

A possible motivational driver would be a solution that empowers them to play an active part - with less physical and psychological effort.

This indicates that people want to live full and active lives where hearing loss is not an issue.

50% of respondents stated that a free trial would motivate them to contact an HCP

Top three motivators

Free trial (50%)

Free hearing check up (46%)

Free appointment (34%)

A key building block of trust

This indicates an opportunity to remove their perceived risk with a risk-free offer; appointment, hearing check up and trial.

We tested 6 directions in order to identify the direction that 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



A hearing loss should not be a barrier to enjoying life to the full. Modern hearing solutions help improve your hearing in a natural way so you can reconnect with those around you.

1 out of 10 people have difficulties hearing. 65% of people with hearing loss are under retirement age. Are you one of them



Hearing loss is far more common than you think and studies show it can affect the quality of your life. Each year millions of people around the world choose hearing instruments to improve their life quality.

Treating hearing loss taken expert listening. Treating hearing loss is a serious and delicate matter.



There are frequent technological advances made in hearing care and we're dedicated to sharing them with you. You can trust your local hearing care professionals to find a tailored solution to suit your needs and lifestyle.

Play your part. Get life rolling. Be empowered to communicate freely



Modern hearing solutions give you the ability to follow conversation - even in complex sound environments, and the confidence to interact and participate to the full.

Has your hearing changed? It maynot be what you think. Do you have difficulties hearing? It might just be wax.



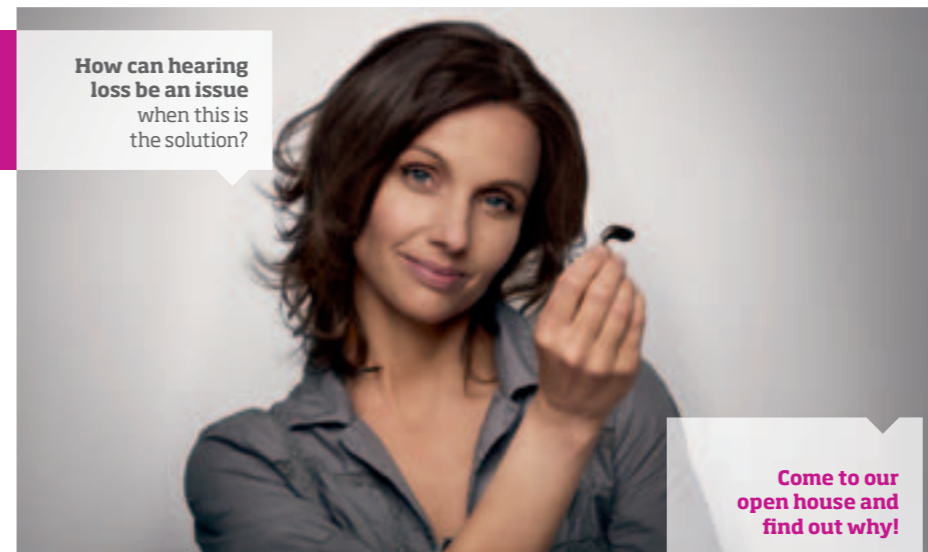
Change in your hearing does not automatically mean you have permanent hearing loss. In fact, it might just be wax. Seeing your hearing care professional is the first step to hearing better.

It had to happen. Finally! A hearing device you actually want to wear.



Today's hearing devices bear no resemblance to those of yesterday. They're petite, discreet, beautifully designed and you hardly know you have them on. Most importantly, they can really open up your world.

Which of the advertising directions would most likely motivate you to learn more or buy a hearing instrument?



#1 out of 6 directions tested

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... (show product)

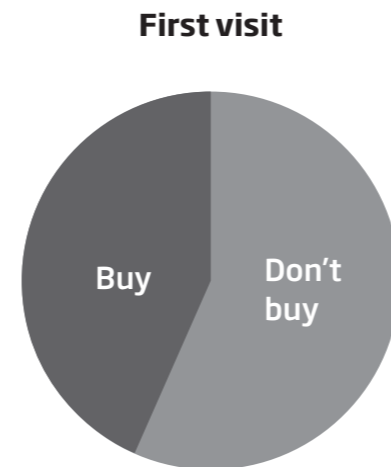


Let's communicate
Want to learn more? Call now to experience the difference with a risk free consultation and trial.

Findings part 2

How do we further motivate those who are interested to buy a solution?

Most people do not know what to expect from their first visit



55% don't buy at first consultation

want more information

find the solution too expensive

want more time to think

want a second opinion

want to compare prices

want to discuss the decision with their family

This indicates that there is a need for readiness assessment **and** motivational tools that can help people to realise the importance of addressing their hearing difficulties as soon as possible.

Time, understanding and trust ranked high when asked what was most important during their first consultation

Explains my options well and their benefits in relation to the costs (39%)

Is not pushy (36%)

Understands my needs and concerns (32%)

Gives me the option to try out the hearing instruments (30%)

I feel that I can trust him/her (29%)

Gives me the time that I need (29%)



“Will it get worse if I don’t do something?” is their number one concern!

This indicates that a follow-up program is extremely important to ensure that their hearing difficulties are not getting worse and to keep them abreast of opportunities to address their problem.

2 key statements best described their IDEAL experience with an HCP

Balance:

The professional will help me deal with my hearing difficulties so that I can restore and maintain the equilibrium in my life with feelings of peace and relaxation.

Connection:

The professional will listen to me and respect my feelings and thoughts. I will experience a trustworthy connection with her/him.

Despite this, however, 50% of them visit two or more hearing care professionals

More than three quarters visited more than one HCP because they felt the need to have a second opinion, and one of four wanted to compare prices.

Nearly one in five did not feel that their needs and concerns were understood.

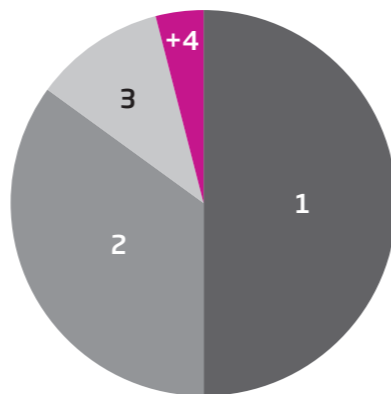
When concern for hearing difficulties is high, the main barriers to getting hearing instruments are cost and effort/involvement.

This emphasises the importance of listening to their needs and concerns at the first consultation - a core component of building trust.

This indicates the importance of ensuring that people understand the benefits of different types of hearing instruments in relation to cost.

A follow-up program is extremely important in order to keep non-users informed about options tailored to their needs as well as special offers.

Number of shops visited



Some non-users are more pro-solution than others, but they are seeking a “quick fix”

Style, discreetness and hearing sound as “expected to” with less effort are important factors in the adoption of hearing instruments.

Feels comfortable (42%)

Sounds natural (31%)

Discreet/invisible (33%)

Easy-to-handle (26%)

This indicates that letting them experience the benefits of modern hearing care solutions early in the process can reduce their psychological barriers to wearing a hearing solution.

Communication should illustrate how discreet, comfortable and natural sounding modern hearing solutions are.



HCPs and manufacturers have many opportunities to motivate non-users by addressing the factors of effort, stigma and trust in a systemised way

- EFFORT** ▶▶ Time, Cost, Change
- STIGMA** ▶▶ Perception of ageing
- TRUST** ▶▶ The doctor, the expert

This indicates the need to channel them into a structured communication program that addresses their needs and concerns in accordance with where they are in their journey. Doing this in the most effective way requires both emotional and rational levers.

Summary



Summarising

Among non-users of hearing instruments who are aware of their hearing loss, there is a strong correlation between their concern for their hearing difficulties and their interest in a solution. The need to concentrate and use extra energy to hear people talk, and embarrassment around asking people to repeat themselves, are the biggest affects of their hearing difficulties.

People who consider themselves as being active are quicker to do something about their hearing loss. The ability to participate actively, effortlessly and naturally - where hearing loss is not an issue - is what non-users evaluate as most important. Hence, hearing care professionals and manufacturers have a unique opportunity to influence the main barriers to contacting and purchasing.

Non-users' "time to visit" a hearing care professional is determined by a combination of hearing loss, lifestyle, and the actions of hearing care professionals and manufacturers. Non-users have "several concerns" regarding their hearing difficulties: from assessing the degree of hearing difficulty, to the possibility of fixing their problem and the costs associated with it. The core elements of choosing to fix their problem are a combination of effort (time, cost, change), perception of ageing associated with wearing hearing instruments, and the trust they develop in their HCP.

A large proportion of people are interested in learning about hearing and hearing loss on the Internet and would like to receive online material about these topics.

Advertising is an influencer of initial enquiries both among non-concerned and very concerned non-users. Helping non-users to take the first step and to contact a hearing care professional can be facilitated by a free test or free trial of instruments or a free appointment with an expert. This should be seen as a tool to overcome the barrier of cost associated with fixing the problem which is perceived high among non-users.

Most people do not know what to expect at their first consultation but time, listening, understanding and trust rank high in importance.

Getting tested and receiving information with the empathy of someone who understands what they are experiencing, are their main basic expectations before visiting an HCP. Some non-users are more pro-solution than others, and professionals who understand non-users' attitudes toward their hearing loss and hearing instruments are better able to motivate them to take the next step and build trust. This indicates a need for readiness assessment and motivational tools that can help people to realise the importance of addressing their hearing difficulties as soon as possible.

The number one concern of people who opt not to do something at their first visit is whether their hearing difficulties will get worse. This indicates that a follow-up program - via regular hearing check ups and keeping them abreast of opportunities to address their problem - is extremely important to ensure that their hearing difficulties are not getting worse.

Style, design and discreetness of the hearing instruments are key determinant factors in non-user adoption of hearing instruments. Comfort and hearing sound as "expected to" are also important factors governing hearing instrument choice, but come well after speech understanding. End users highly value the ability "to hear with less effort", and hearing instrument delivery of the most natural sound possible.

Allowing non-users to experience the benefits of playing an active part in life, with less physical and psychological effort, can build trust and increase interest in ownership for a solution. Deploying these levers in advertising and communications, along with a risk free trial of a modern hearing care solution, can motivate people to take the next step.

On average, half of non-users buy a hearing instrument on their first visit and half visit two or more hearing care professionals. When concern for their hearing difficulties is high, the main barriers to getting hearing instruments are costs and effort/involvement.

This indicates the importance of ensuring that people understand the benefits of different types of hearing instruments in relation to cost. A follow-up program is extremely important to keep non-users informed about options tailored to their needs, as well as with special offers.

In summary, helping people to take ownership for their hearing loss is a multi-step process and it is important to channel them into a structured communications system. This communication system should be based on their needs and concerns and include a combination of emotional and rational motivational tools in accordance with where they are in their journey.

People First

People First is our promise
to empower people
to communicate freely,
interact naturally and
participate actively