

**Findings from  
consumer survey**



**Summary report  
Experienced Users**

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

The **purpose** of the study was to understand the **concerns, needs and motivational drivers** of the **experienced** hearing instrument user\*

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**1** **Guiding research questions:**  
Which opportunities do Hearing Care Professionals have to build loyalty, activate and retain their clients.

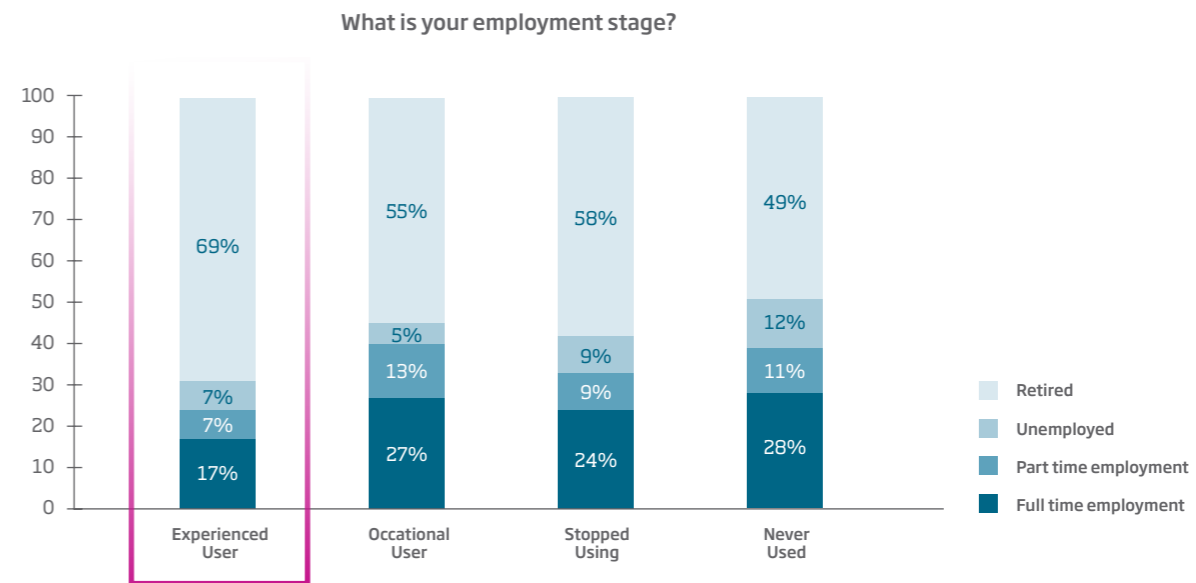
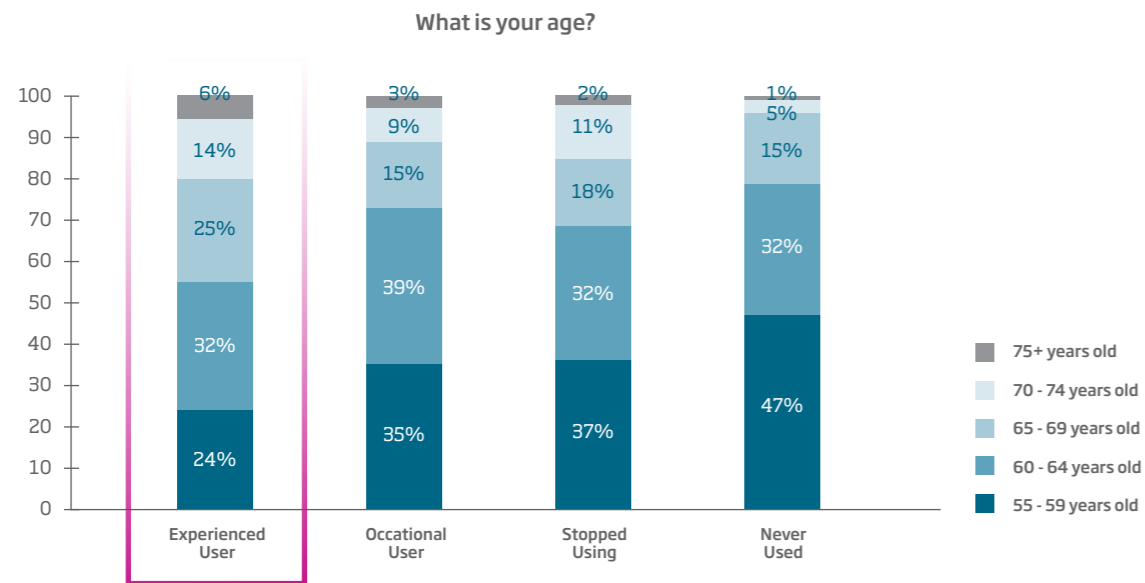
**2** Which opportunities do Hearing Care Professionals have to motivate and convert existing clients into purchasing their next hearing solution with them.

\*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**



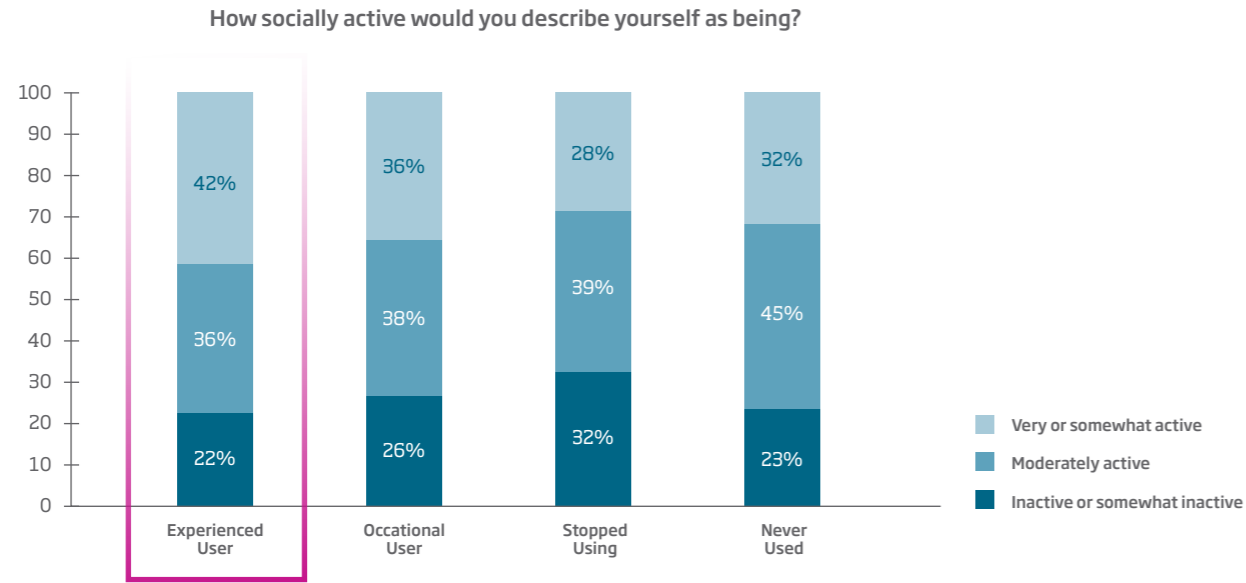
Not surprisingly, the largest number of people among Experienced Users (45%) are over age 65 (compared with the age of the other user groups). It is also no surprise that the largest number of retirees are within the Experienced User group.

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.

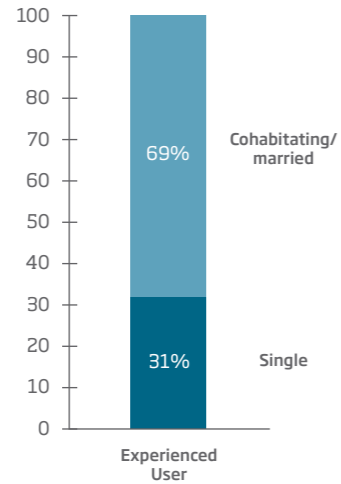
The group of people over age 65 where there are the highest percentage of retirees, is also the group that perceives themselves as being most active.

This finding contradicts conventional presumptions, 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!**

Which of the following best describes your current living situation?



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





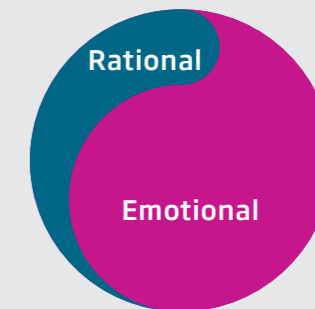
A Pre-user's\* concerns are a mix of rational and emotional. The most frequent rational concerns regard insecurity about hearing loss: "Will it get worse?", "can something be done?". Other rational concerns are about practicalities in terms of maintenance, learning to use instruments, getting used to new sound, etc.

\*A Pre-user is a person who experiences hearing difficulties, but has never used a hearing instrument.

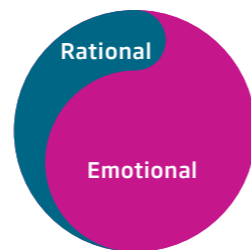
Experienced Users are accustomed to most of the practical, rational issues regarding wearing, cleaning and maintaining hearing instruments. They know what to expect in terms of sound quality. This seems to leave them more space for emotional concerns.

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.



## Despite already owning, and wearing hearing instruments, Experienced Users still have **rational concerns**



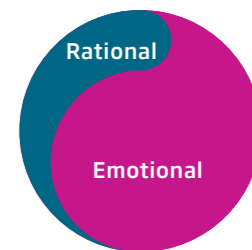
### What concerns do you have about your hearing?

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

## Experienced Users' demands are driven by **emotional needs**

### Which benefits do you find most important?

	Experienced User
Hearing instruments that give me the most natural hearing possible - as nature intended.	59.6%
Hearing instruments that help me to participate in conversations	47.4%
Hearing instruments that make it less of an effort to listen	35.5%
Hearing instruments that are as small as they can be and have the latest possible technology	27.1%
Hearing instruments that help me to focus on what I want to listen to and ignore other sounds	25.5%
The ability to watch TV with others at the volume I need	24.9%
The ability to talk on the phone/hear the phone ring	24.4%
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	23.5%
Hearing instruments that improve the sound quality when listening to music and watching a movie	17.5%
Hearing instruments that are the smallest possible	17.7%



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?

	Experienced User	Never Used
I wanted to look around, see hearing instruments and check prices	33.6%	15.6%

### Why did you visit more than one hearing care professional?

	Experienced User	Never Used
I wanted to compare prices on hearing instruments	54.0%	22.6%

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.

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.

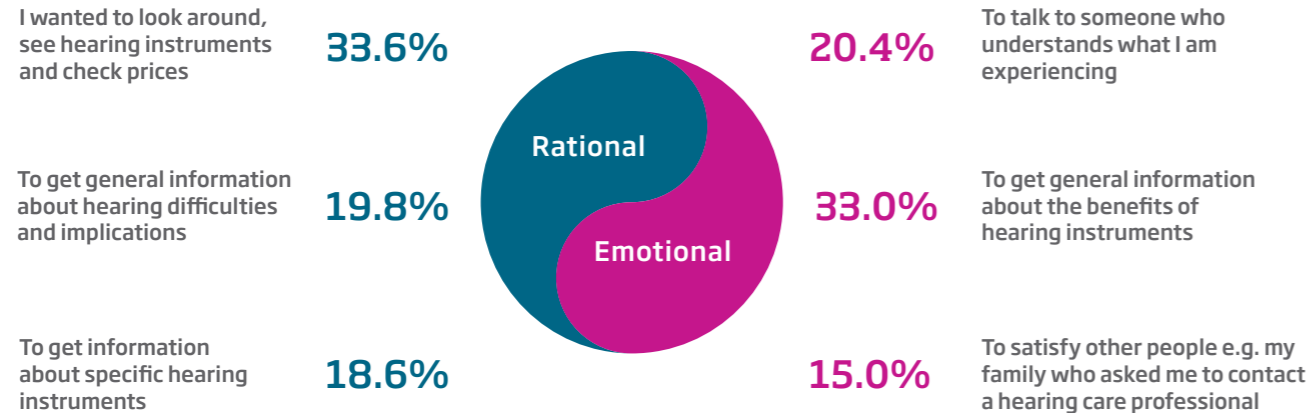
This indicates an opportunity for hearing care professionals to reinforce their position as experts who can empower the user and provide security.

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.

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

What expectations did you have before your latest visit to the hearing care professional?



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?

Get a risk free trial of hearing instruments	51.0%
Get a two week, risk free trial of hearing instruments	50.7%
Get a free hearing test	50.4%
Book a free appointment with an expert	33.0%
A special offer	30.7%
Invitation to product demonstration	25.8%
Contact us to go through your options and get good advice and guidance	19.1%
Invitation to open-house event	15.0%
Participate in an event for people with difficulties hearing	10.2%

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



### Why didn't you buy at first visit?

I wanted more information	31.2%
I realized that getting hearing instruments is more involved 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%

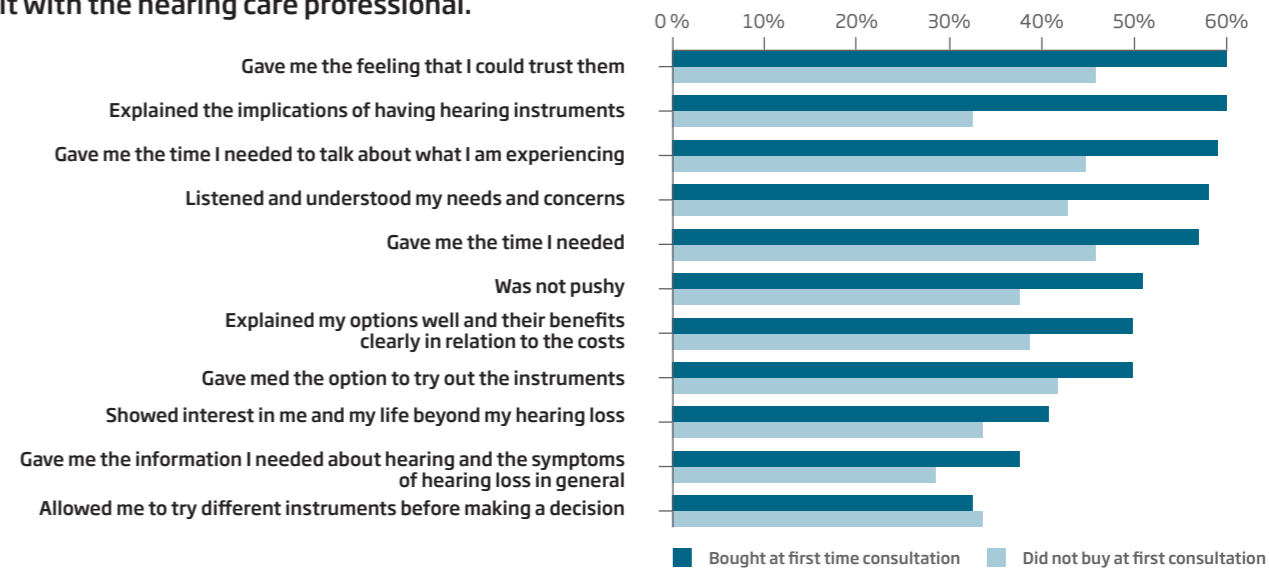
### Why did you visit a second HCP?

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%

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.

## More Experienced Users are created by **exceeding expectations**

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





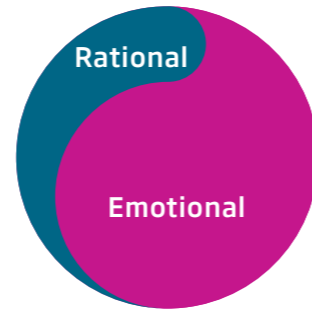
## Exceeding expectations: from monologue to dialogue...

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




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?



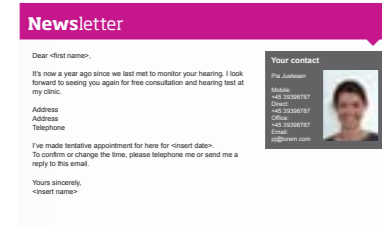
Experienced User      Occasional User      Stopped Using      Never Used

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

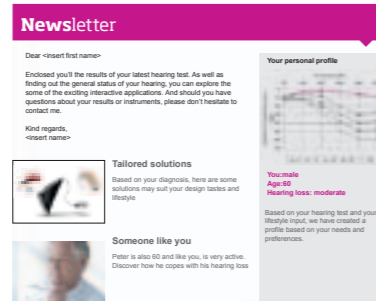
**Less effort**  
Modern hearing solutions are petite, discreet and effective...

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

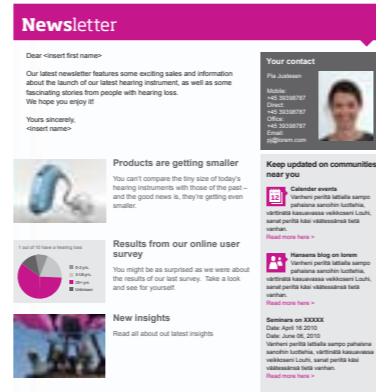
# Which of these programs would you sign up to, in order to keep you updated on hearing, new insight and product improvements?



**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.

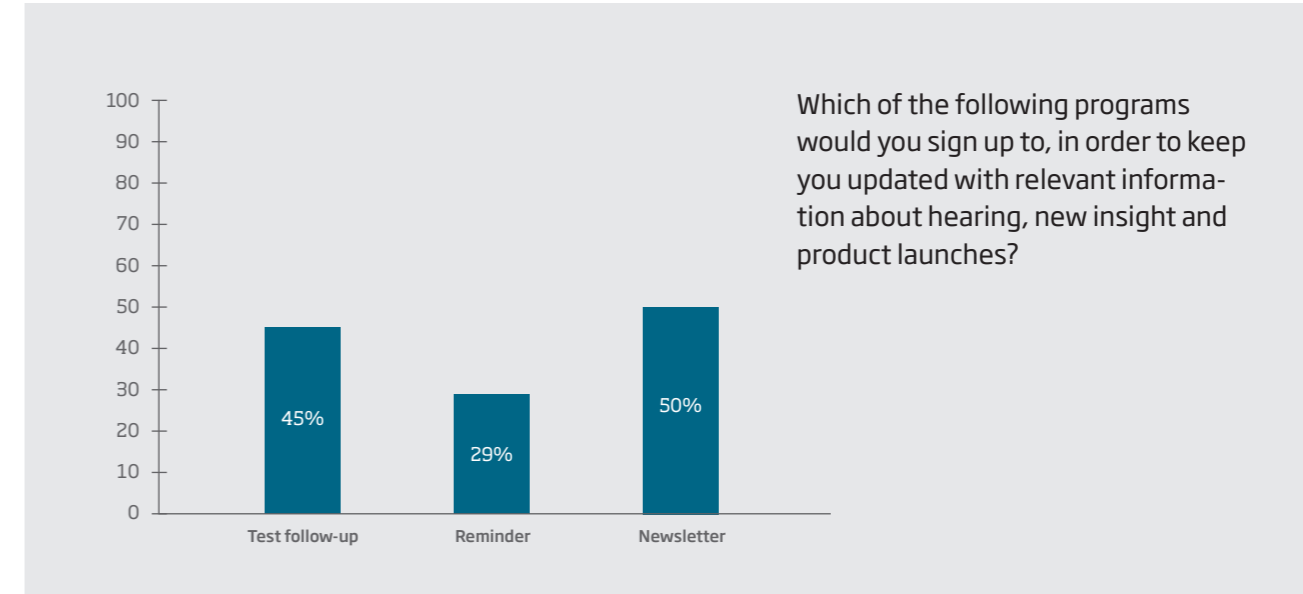


**Hearing test follow-up**  
Sign up for our follow-up program and stay right up-to-date with your hearing. You'll be able to see what is happening with your hearing, compare past test results and learn more about what products could be suitable for you.



**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



Which of the following programs would you sign up to, in order to keep you updated with relevant information about hearing, new insight and product launches?

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.

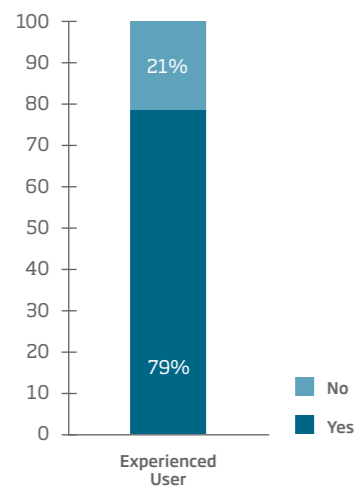
Every third Experienced User would find it interesting to receive reminders in the shape of an annual invitation for a free consultation and a hearing test.

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

Do you use the Internet to find 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.

## Experienced Users use the Internet to prepare themselves for the next purchase

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

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

APPENDIX  
RESEARCH  
DESCRIPTION

## 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.**

## 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

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