



Understanding Consumer Sentiment Toward Hearing Health

Research Report
January 2023

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Background & methodology

While Singapore is a leading market in ASEAN for Cochlear implants, penetration is very low, estimated at 1%.

Cochlear commissioned consumer research, to get a better understanding of general awareness of screening for hearing health generally, and devices such as Cochlear specifically.



Fieldwork

Online questionnaire
10-minute length

N=1,000 interviews

Fieldwork:
December 2022-
January 2023



Target Definition

Singapore

Male/female

Aged 35+



Executive Summary

Key takeaways: The current state of hearing health

- 9 in 10 respondents believe that maintaining hearing health either is very or extremely important to the quality of their life. Over half of the survey respondents (57%) are extremely/very concerned with their hearing health, currently. Men are relatively more concerned than women (60% extremely/very concerned vs 53%).
- 7 out of 10 survey respondents do not currently experience hearing difficulty, and younger respondents are more likely to give themselves a clean bill of hearing health. Of those who have experienced some hearing difficulties, slightly less than a quarter (24%) have been in treatment or are currently seeking treatment. 30% are not actively looking for treatment and 11% do not intend to get treated.
- Only 23% of respondents have had a hearing test in the last 3 years and 27% disagreed with the statement 'I have received good info and education from my GP on hearing health'. This suggests a current blind-spot and potential opportunity for Cochlear in Singapore to play a more active role in promoting hearing health.

Key takeaways: Cost of treatment

- For those with hearing difficulties, they are most likely to discuss this with family members (32%) than with a doctor specializing in hearing issues (29%) or even their family doctor (23%).
- 49% of those with hearing difficulties avoid treatment because they believe they can't afford it. At the same, almost one third do not know where they should go for help. Lower Monthly Household Income respondents are least likely to seek treatment. They don't want to spend money to see the doctor for what they think is something that's manageable.
- This leads to people dealing with hearing difficulties effectively suffering in silence. Emotional and rational barriers to seeking treatment can be lowered by Cochlear promoting the benefits of early testing, and the benefits of seeking treatment.

Key takeaways: 'Positive denial' of problems

- Reasons for not seeking treatment, amongst those who have untreated hearing problems is an emotional barrier – people thinking that because their hearing problems are not consistent or severe, they do not have to see a doctor. This type of 'positive denial' is common in Singapore and SE-Asia and is typically linked to fears that medical treatments cost money and/or limit the ability to be employed.
- Amongst the total base of respondents, the Top 2 reasons that would make someone more likely to seek treatment for hearing difficulties was if it helped them to stay in the workforce longer, or if it would cause them to be less of a burden for their family.
- Considering that most respondents are currently employed, promoting hearing health awareness through corporate wellness schemes could be a route for Cochlear to consider.

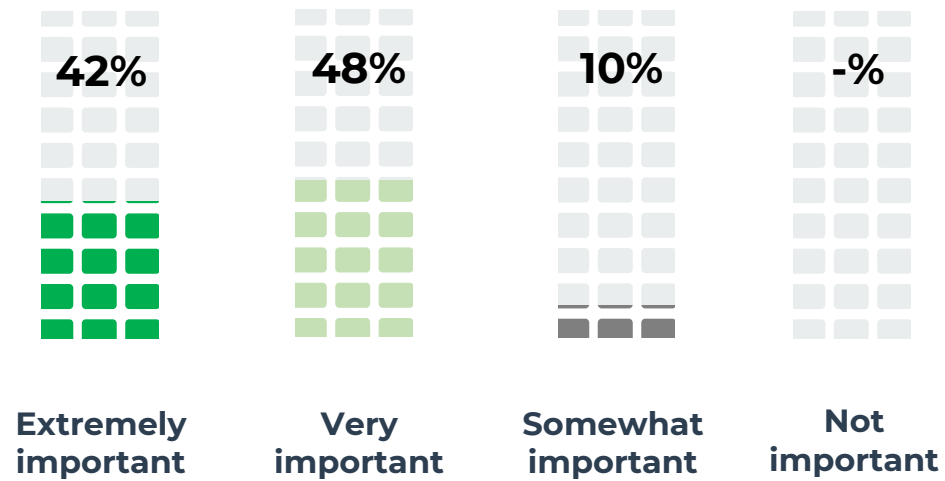


Detailed Findings



Attitudes to Hearing Health

Importance of maintaining hearing health

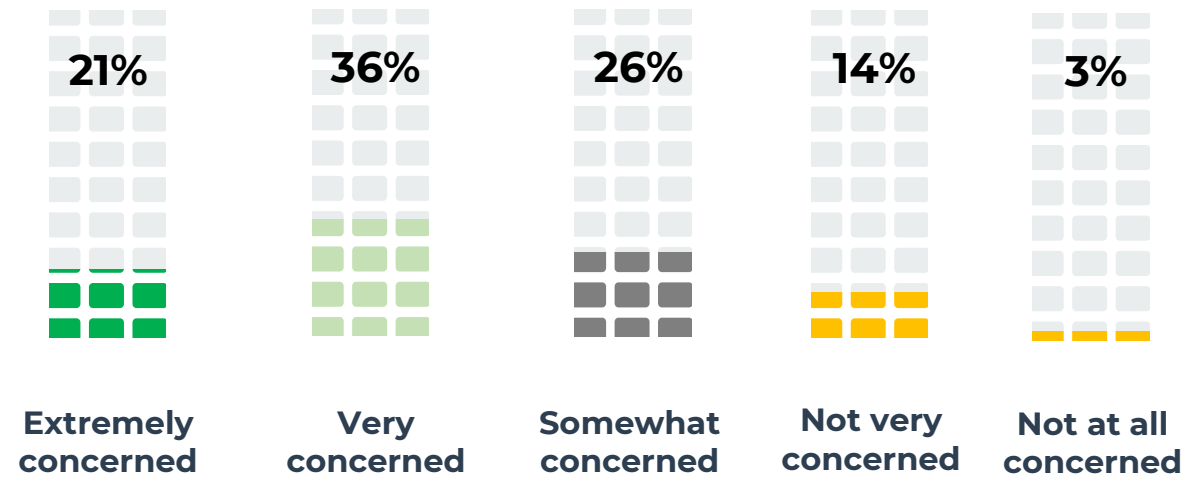


- 9 in 10 respondents believe that maintaining hearing health either is very or extremely important to the quality of their life
- Older respondents were most likely to believe maintaining hearing health is 'extremely important' (45% of those aged 65+, compared with 40% of those aged 35-44)
- 10% of respondents said it was somewhat important; highest amongst those who are single (14%) and those with a Monthly Household Income of less than SG\$3,000 (16%)

A1: In your opinion, how important is maintaining your hearing health to the quality of your life?

Base: All respondents. N=1,000

Hearing health concerns



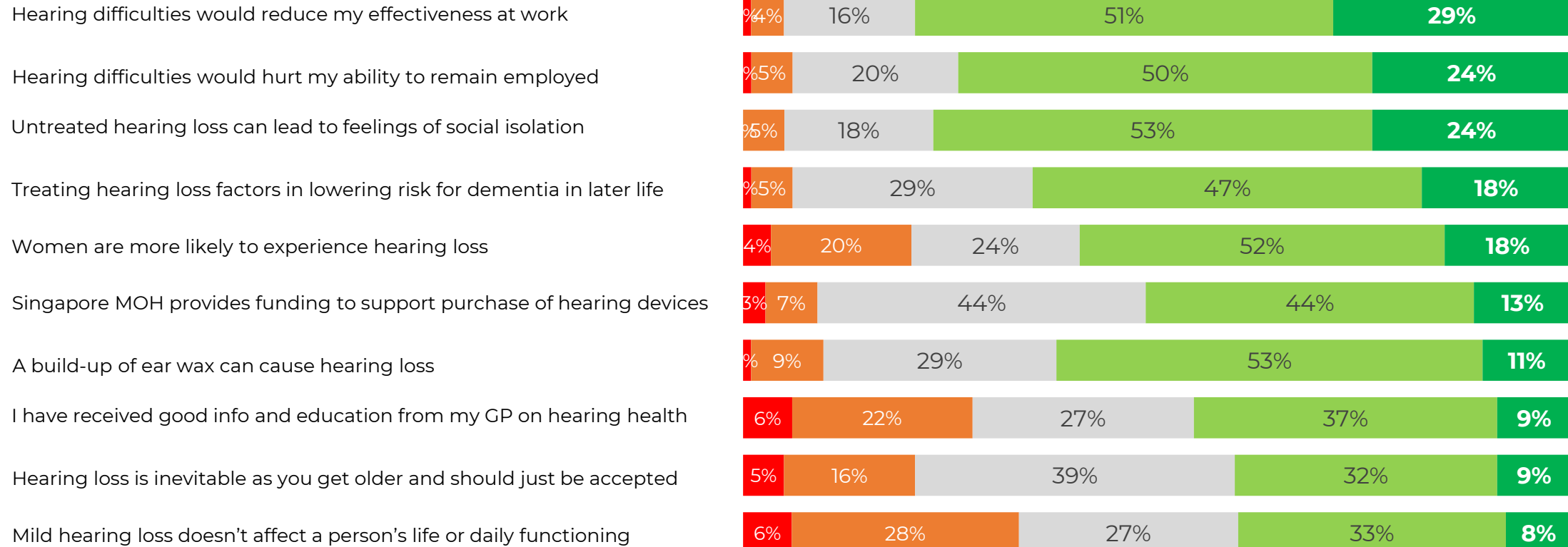
- Over half of the survey respondents (57%) are extremely/very concerned with their hearing health, currently
- Men are relatively more concerned than women (60% extremely/very concerned vs 53%)
- Top 2 Box concern levels decreases as age increases
 - 35-44 61%
 - 45-54 59%
 - 55+ 46%

A2: How concerned are you currently about your hearing health?

Base: All respondents. N=1,000

Attitudes to hearing health

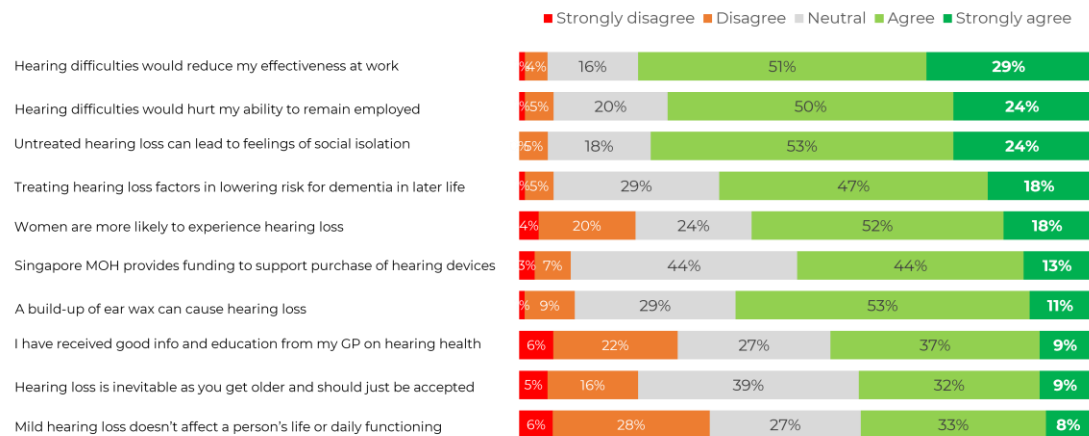
Strongly disagree Disagree Neutral Agree Strongly agree



A3: Please indicate how much you agree or disagree with each of the following statements

Base: All respondents. N=1,000

Attitudes to hearing health

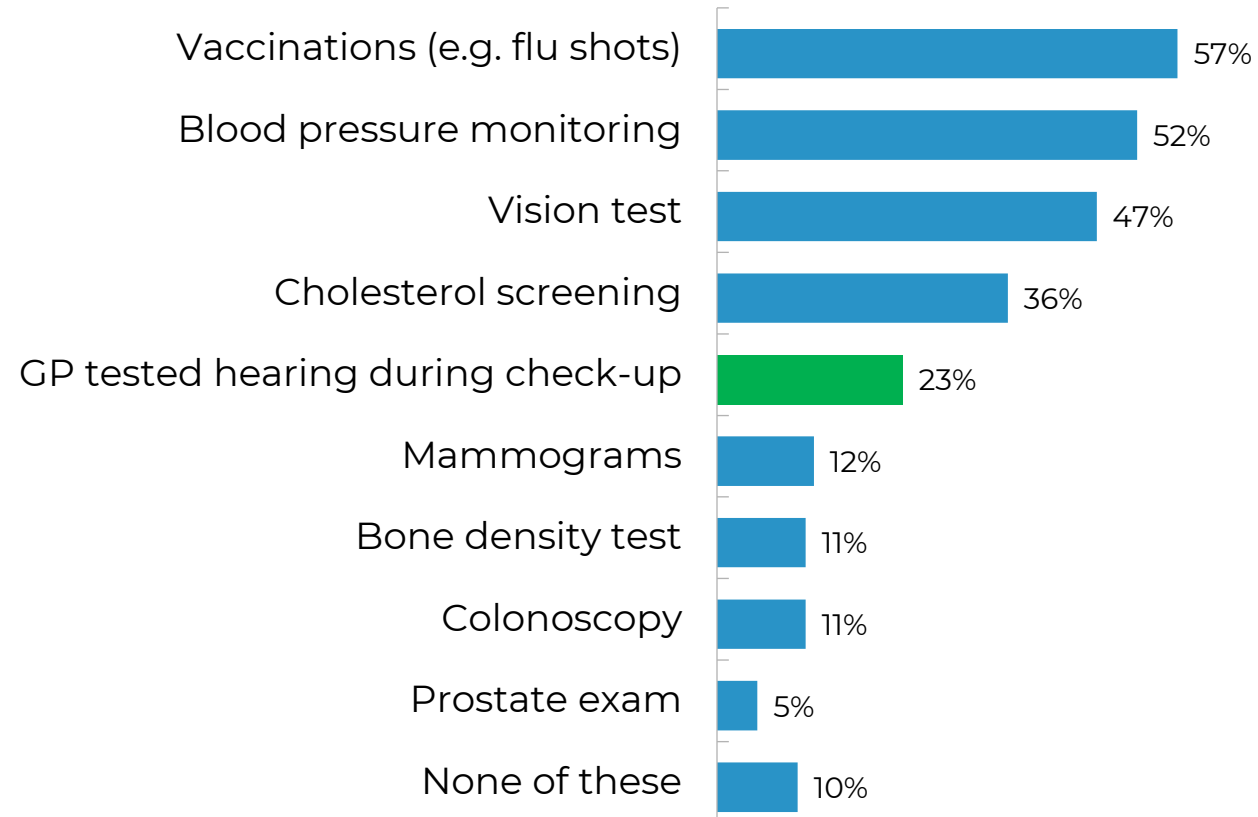


- Survey respondents are in strongest agreement that hearing difficulties would impact their livelihood
- This was true across all age groups, but particularly so for those aged 55 and above
- Over a quarter of respondents (27%) disagreed with the statement 'I have received good info and education from my GP on hearing health'
- This suggests a current blind-spot and potential opportunity for health care professionals in Singapore to play a more active role in promoting hearing health
- Worryingly, 41% believe that 'Hearing loss is inevitable as you get older and should just be accepted'

A3: Please indicate how much you agree or disagree with each of the following statements

Base: All respondents. N=1,000

Medical tests recently undertaken

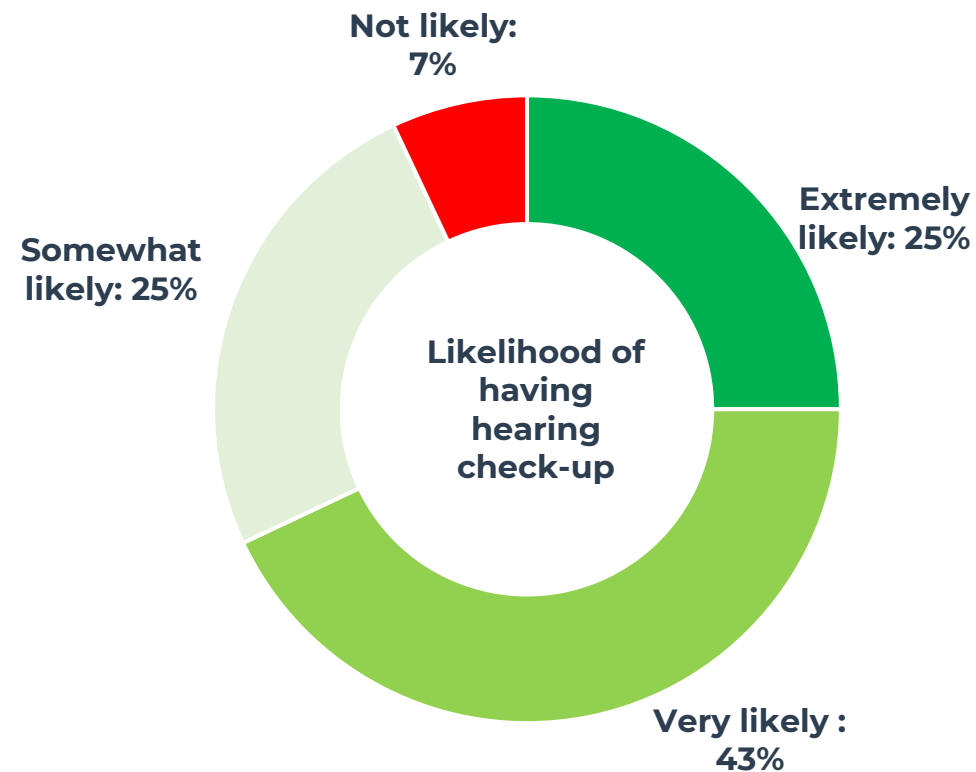


- Unsurprisingly, vaccinations top of the list of medical tests undertaken in the last 3 years
- Having a hearing test during a GP check-up ranks 5th on the list, but equates to less than a quarter (23%) of survey respondents, less than half the number who had a vision test in the same time period
- This figure was even lower for:
 - Women (19%)
 - People aged 55+ (15%)
 - Single people (14%)
 - People with MHI of less than SG\$3K, (11%)

A6: Which, if any, of the following have you had in the past 3 years? Please select all that apply.

Base: All respondents. N=1,000

Likelihood of getting a hearing check-up

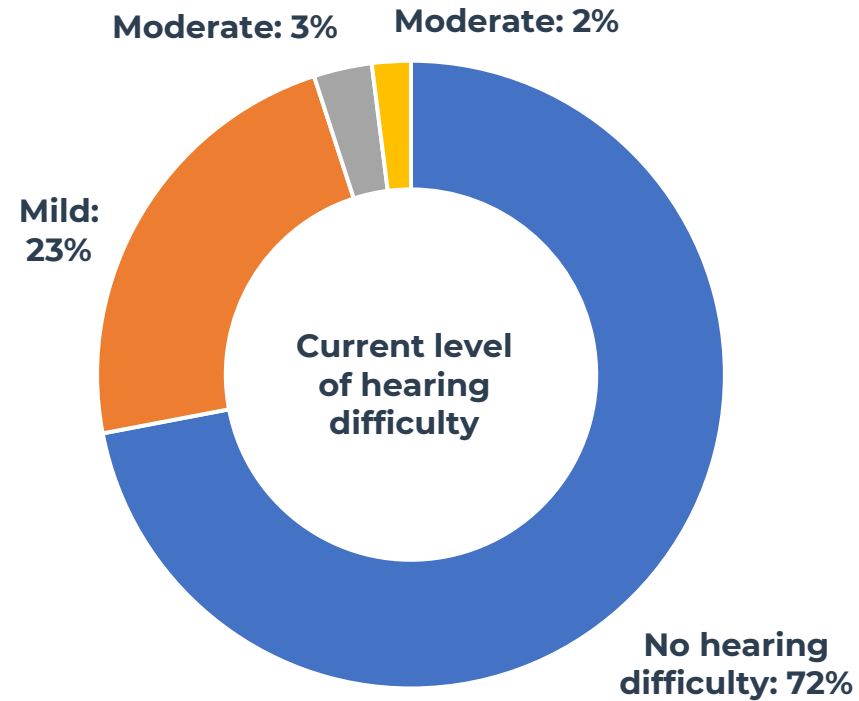


- Over two-thirds of survey respondents would be very or extremely likely to get a hearing check-up
- Men (72%) are significantly more likely than women (64%), but no significant differences in opinion by age
- Monthly Household Income has a greater effect on likelihood to have a hearing test:
 - Less than SG3k per month, 15% not likely to test vs 4% amongst those earning SG\$10K or more

A5: If you felt you had difficulty with your hearing, how likely would you be to get a hearing check-up?

Base: All respondents. N=1,000

Current hearing difficulties

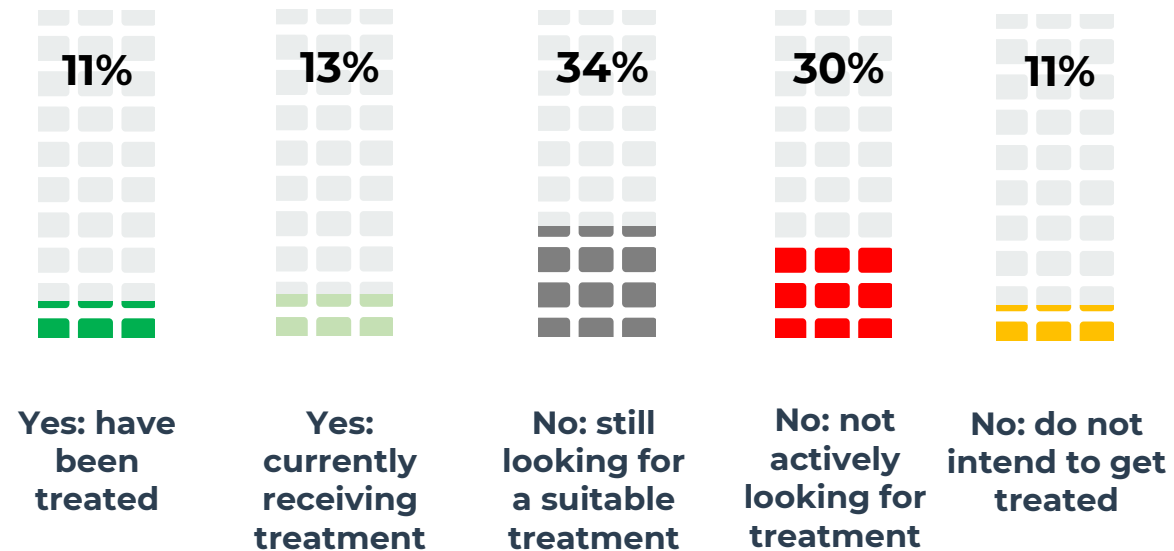


- 7 out of 10 survey respondents do not currently experience hearing difficulty, and younger respondents are more likely to give themselves a clean bill of hearing health
 - 35-44 75%
 - 45-54 70%
 - 55-65 71%
 - 65+ 62%
- No significant differences by gender

A4a: Do you currently experience any difficulty hearing?

Base: All respondents. N=1,000

Treatment for hearing difficulties

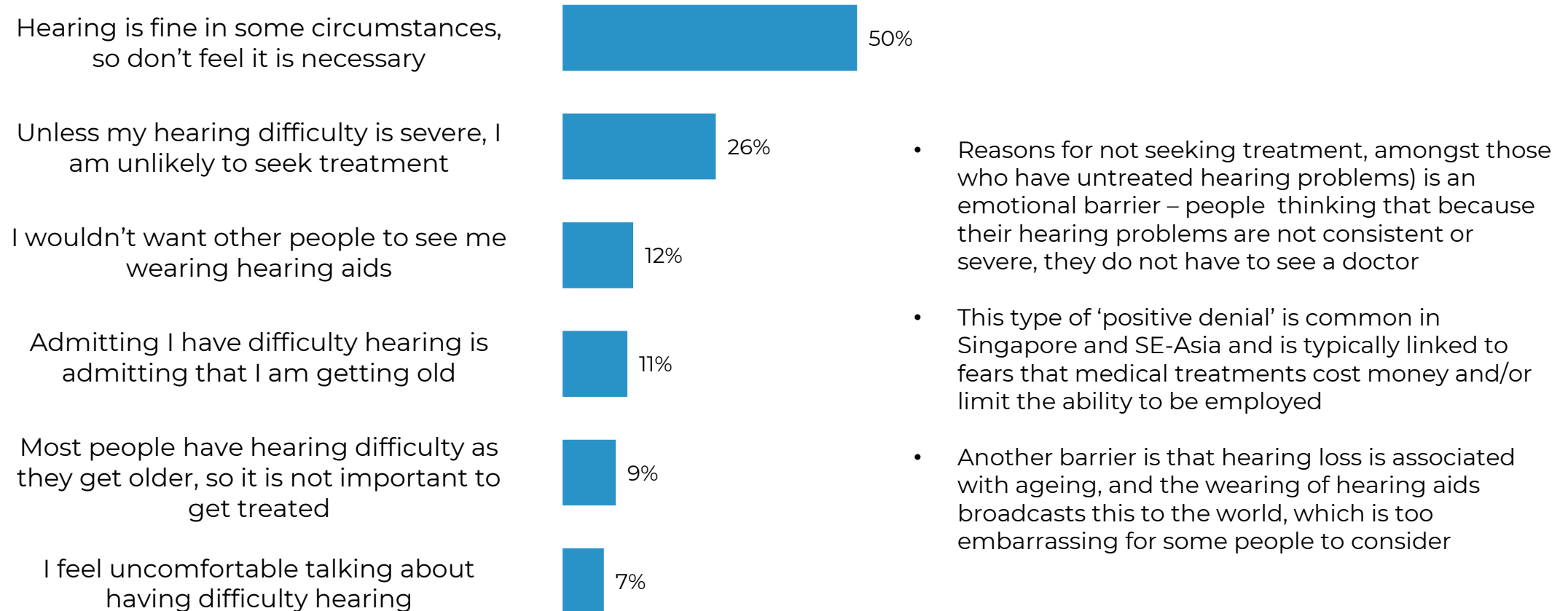


- Of those who have experiences some hearing difficulties, slightly less than a quarter (24%) have been in treatment or are currently seeking treatment
- 34% are still looking for a suitable treatment
- 30% are not actively looking for treatment and 11% do not intend to get treated
- The percentage of those not intending to get treated rises to 17% amongst those aged 55+ and 26% of those earning less than SG\$3K per month

A4b: You mentioned you have some difficulty hearing. Have you been treated or are receiving treatment for this condition?

Base: All experiencing some hearing difficulties. N=282

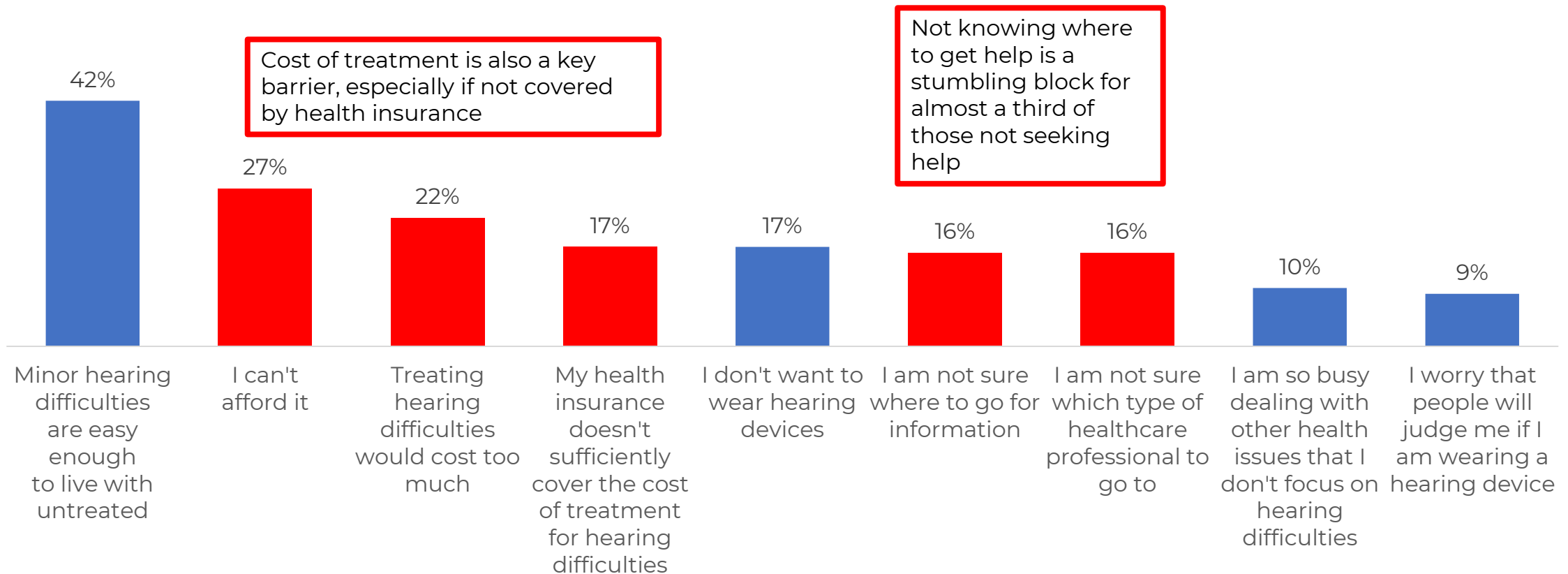
Reasons for not seeking hearing treatment



A7: You mentioned earlier that you are not actively looking for treatment or do not intend to get treated for difficulty hearing. Which of the following best explains why you made this decision?

Base: All respondents with hearing difficulties, but not seeking treatment. N=116

Barriers to seeking treatment

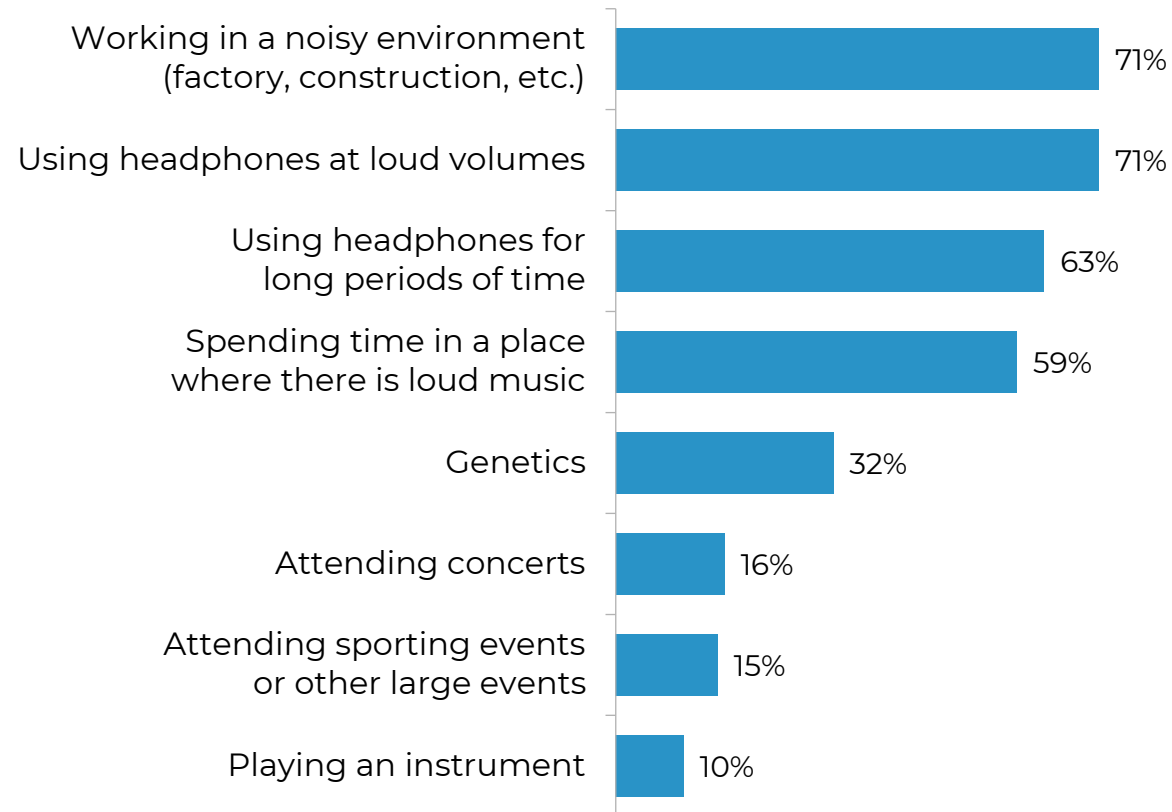


A8: Which of the following, if any, might prevent you from getting help for your hearing difficulty?

Base: All respondents with hearing difficulties, but not seeking treatment. N=116



Activities believed to contribute to poor hearing

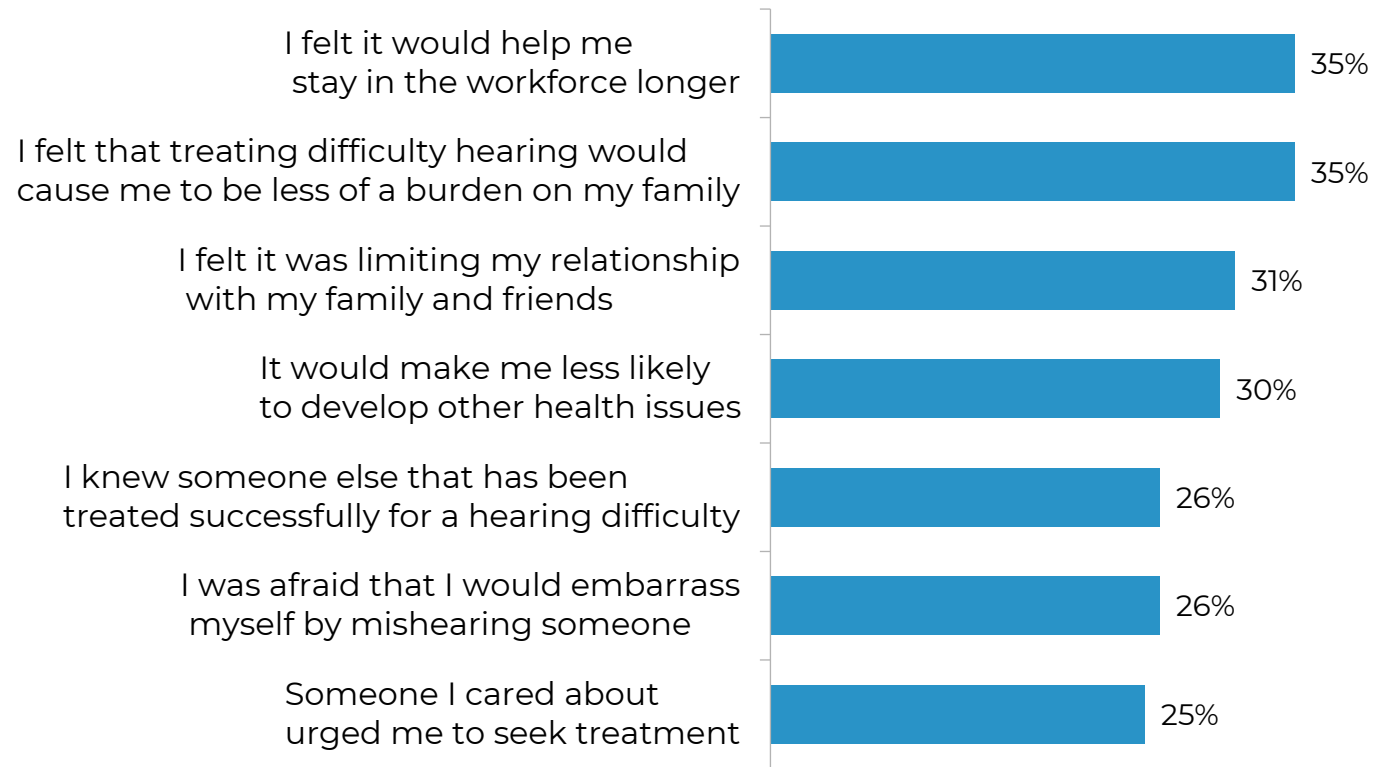


- Almost 3 quarters of respondents (71%) believe that poor hearing is a result of working in a noisy environment or using headphones at loud volumes
- These attitudes were broadly similar across gender, age and other socio-demographic indicators

A9: Do you think that any of these activities could contribute to hearing problems?

Base: All respondents. N=1,000

Triggers for seeking treatment



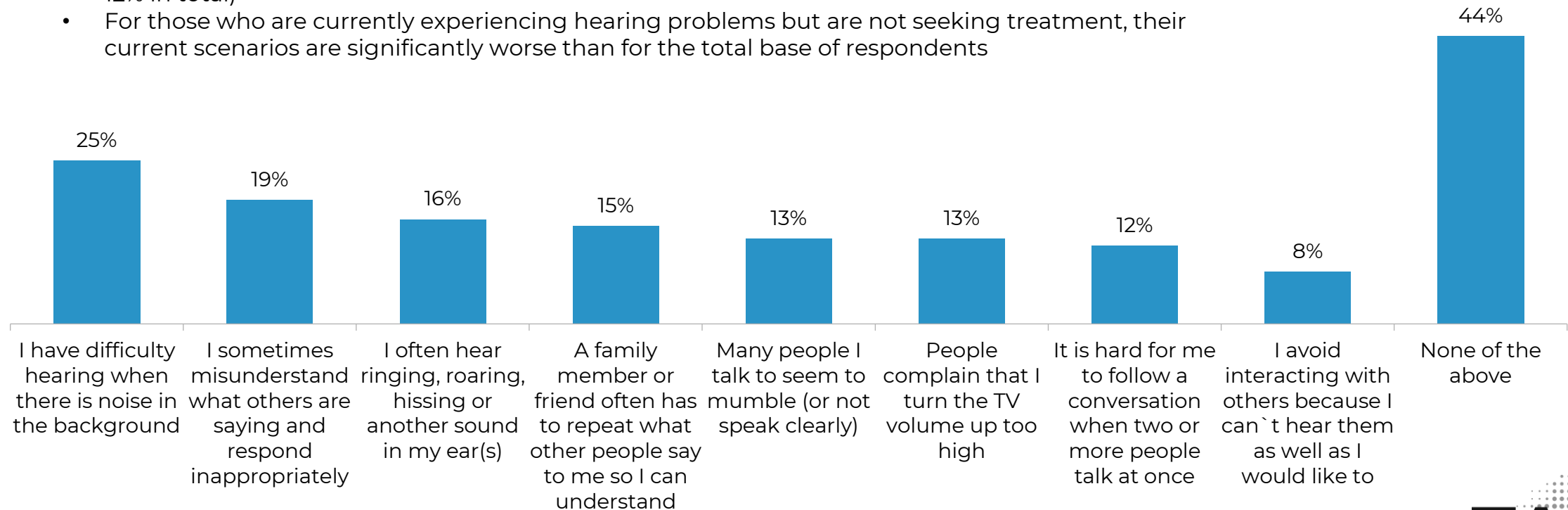
- Amongst the total base of respondents, the Top 2 reasons that would make someone more likely to seek treatment for hearing difficulties was if it helped them to stay in the workforce longer, or if it would cause them to be less of a burden for their family
- Being less of a burden on family is higher for women (39%) than men (32%), while staying in the workforce longer is higher for men (40%) than women (28%)
- Amongst those with hearing problems that they are not having treated, the key trigger would be if they could afford it (33%)

A10: Which of the following best describes how likely are you to seek treatment for a hearing difficulty? I would be more likely to seek treatment for a hearing difficulty if...?

Base: All respondents. N=1,000

Current hearing experience

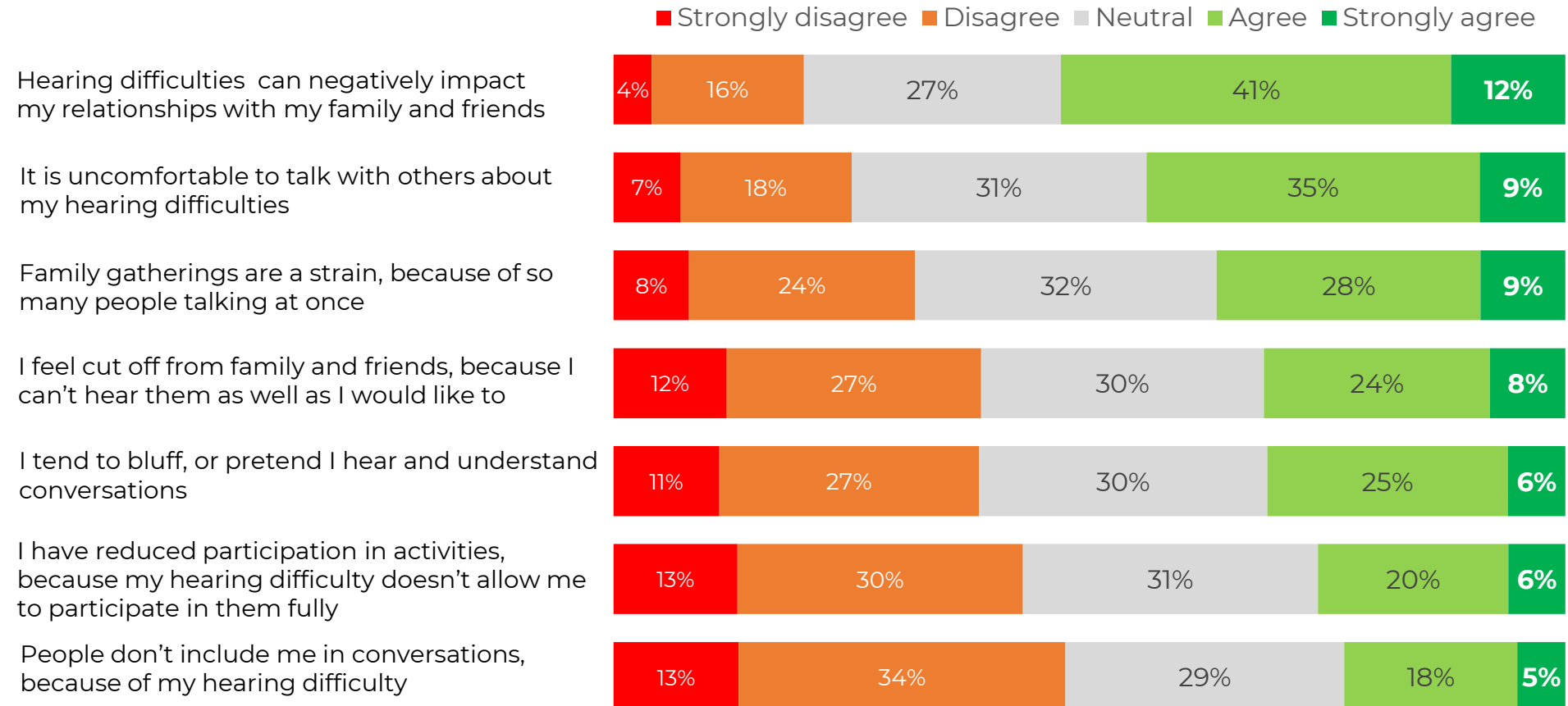
- Amongst the total base, 25% have difficulty hearing when there is noise in the background, rising to 36% amongst those aged 65+
- Respondents aged 65+ are significantly more likely to misunderstand what other people are saying (24% vs 19% in total) or find it hard to follow conversations when two or more people are talking (20% vs 12% in total)
- For those who are currently experiencing hearing problems but are not seeking treatment, their current scenarios are significantly worse than for the total base of respondents



All: Which of the following scenarios describe your current hearing experience?

Base: All respondents. N=1,000

Social impact of poor hearing health



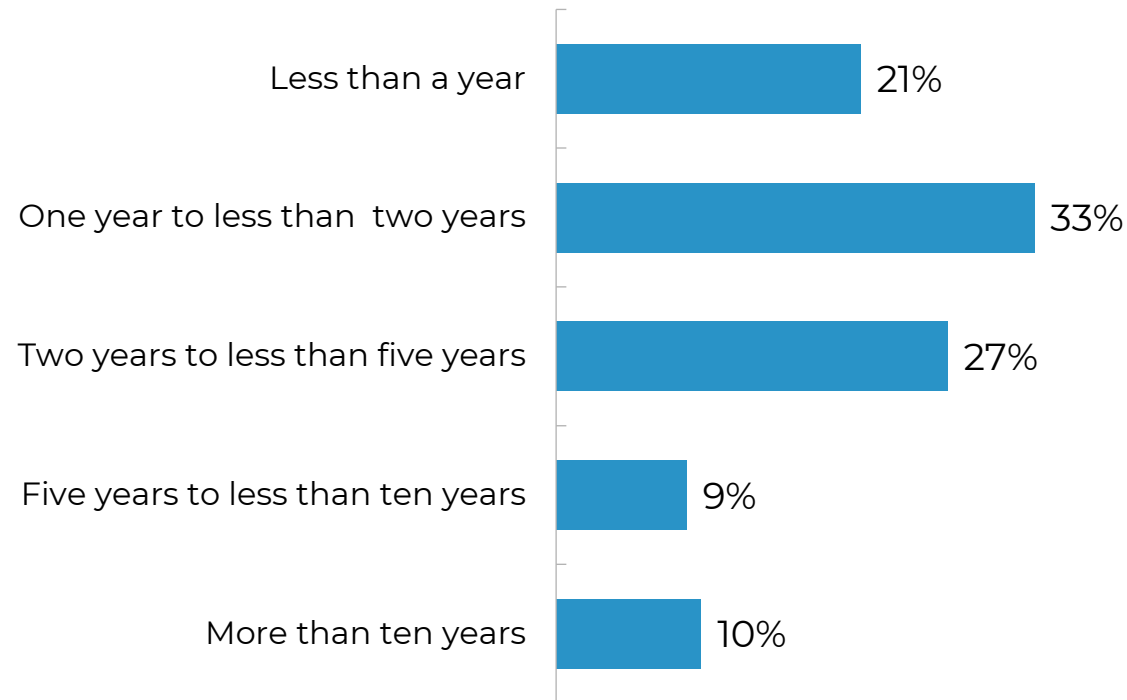
A12: Please indicate how much you agree or disagree with each of the following statements

Base: All respondents. N=1,000



Managing Hearing Difficulties

Length of time experiencing poor hearing

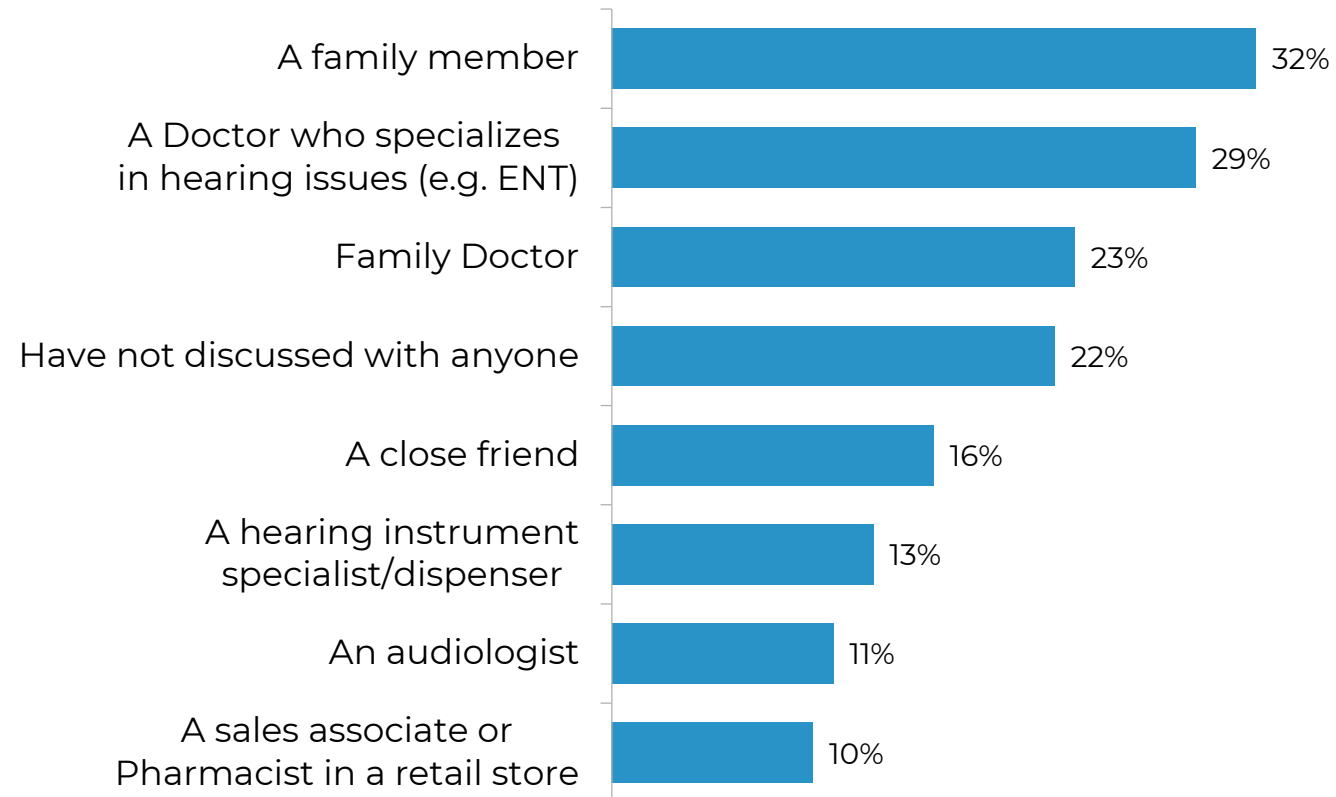


- 19% of those who currently experience hearing difficulties have been suffering with poor hearing health for more than 5 years
- This rises to 30% amongst those aged 65+
- This is a long time for people to suffer unnecessarily, given the range and options of treatments available that they are likely to be unaware of, given the infrequency of hearing tests mentioned on earlier slides

A13: Earlier you mentioned that you have trouble hearing. About how long have you had trouble hearing?

Base: All respondents with hearing difficulties. N=282

Discussing hearing difficulty

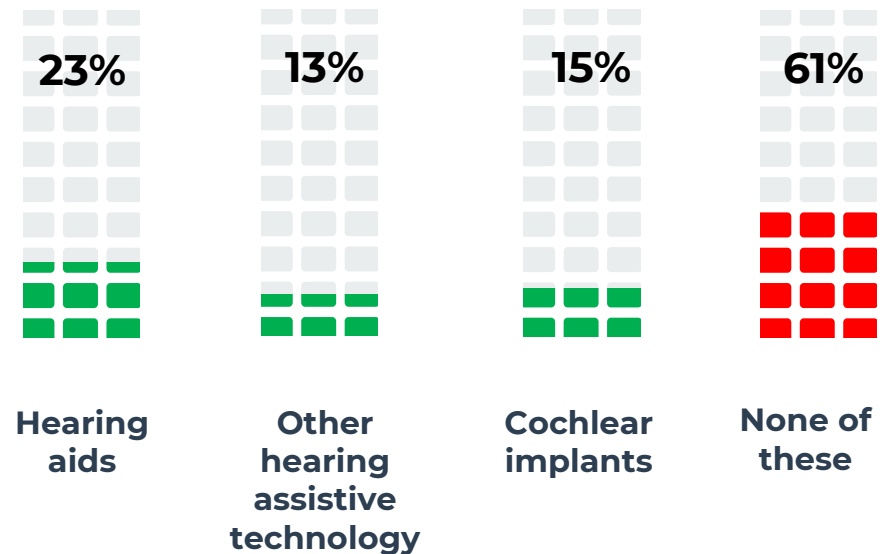


- For those with hearing difficulties, they are most likely to discuss this with family members (32%) than with a Doctor who specialises in hearing issues (29%) or even their family doctor (23%)
- Men with hearing difficulties are more likely to discuss with an ENT (34%) when compared with women (22%)
- 22% have not discussed their hearing difficulties with anyone, rising to 30% of those in the lower Monthly Household Income brackets

A14: Have you discussed your hearing difficulty with any of the following?

Base: All respondents with hearing difficulties. N=282

Use of medical devices for hearing difficulty

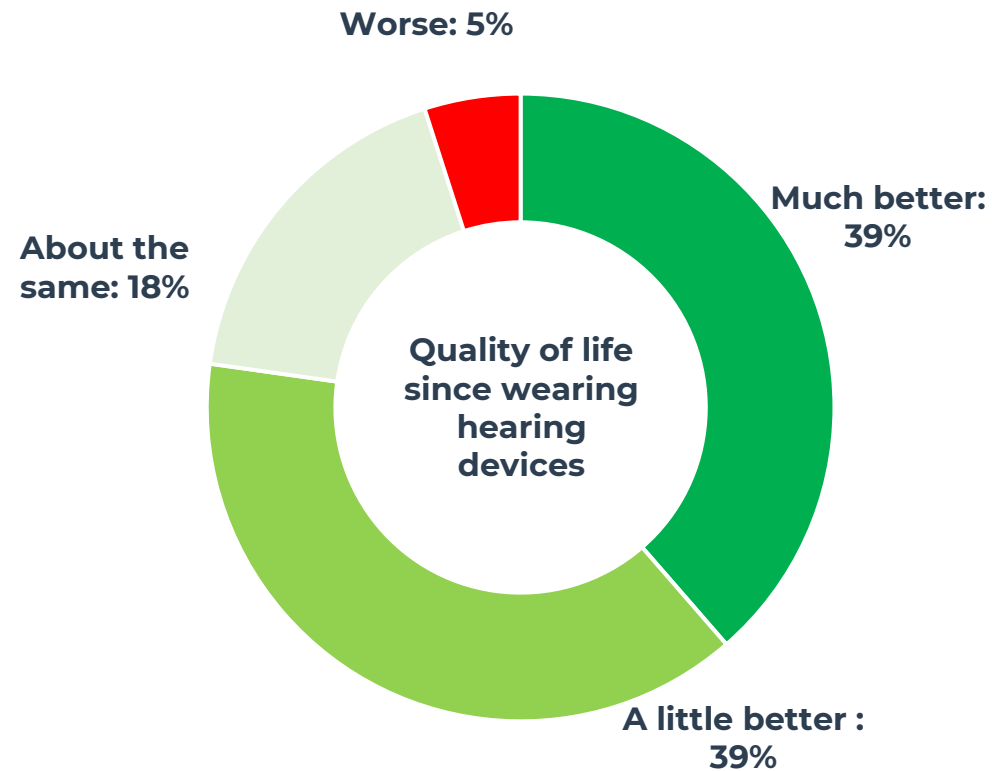


- 61% of those who are currently experiencing hearing difficulties do not use any devices to help them hear better
- They are, quite literally, suffering in silence
- 70% of women with hearing difficulties are not using any devices, compared to 54% of men with hearing difficulties
- 75% of those aged 55+ do not use any, compared to 50% of those aged 35-44
- In terms of usage of devices by Monthly Household Income, 64% of those earning less than SG\$3K are not using any, compared to 51% of those earning SG\$10k or more each month

A15: Do you have any of the following to help you hear better?

Base: All respondents with hearing difficulties. N=282

Positive benefit of wearing hearing devices



- Important to communicate the good news that quality of life improves when wearing hearing devices, for the majority of those using them

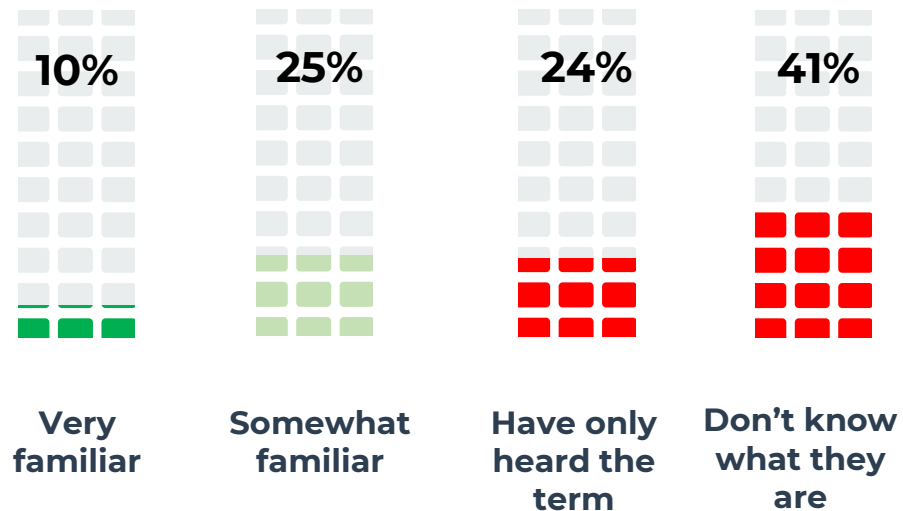
A16: How would you rate the quality of your life since you have been wearing hearing devices?

Base: All respondents with hearing difficulties and using hearing devices. N=111



Awareness of Cochlear Implants

Awareness of Cochlear implants

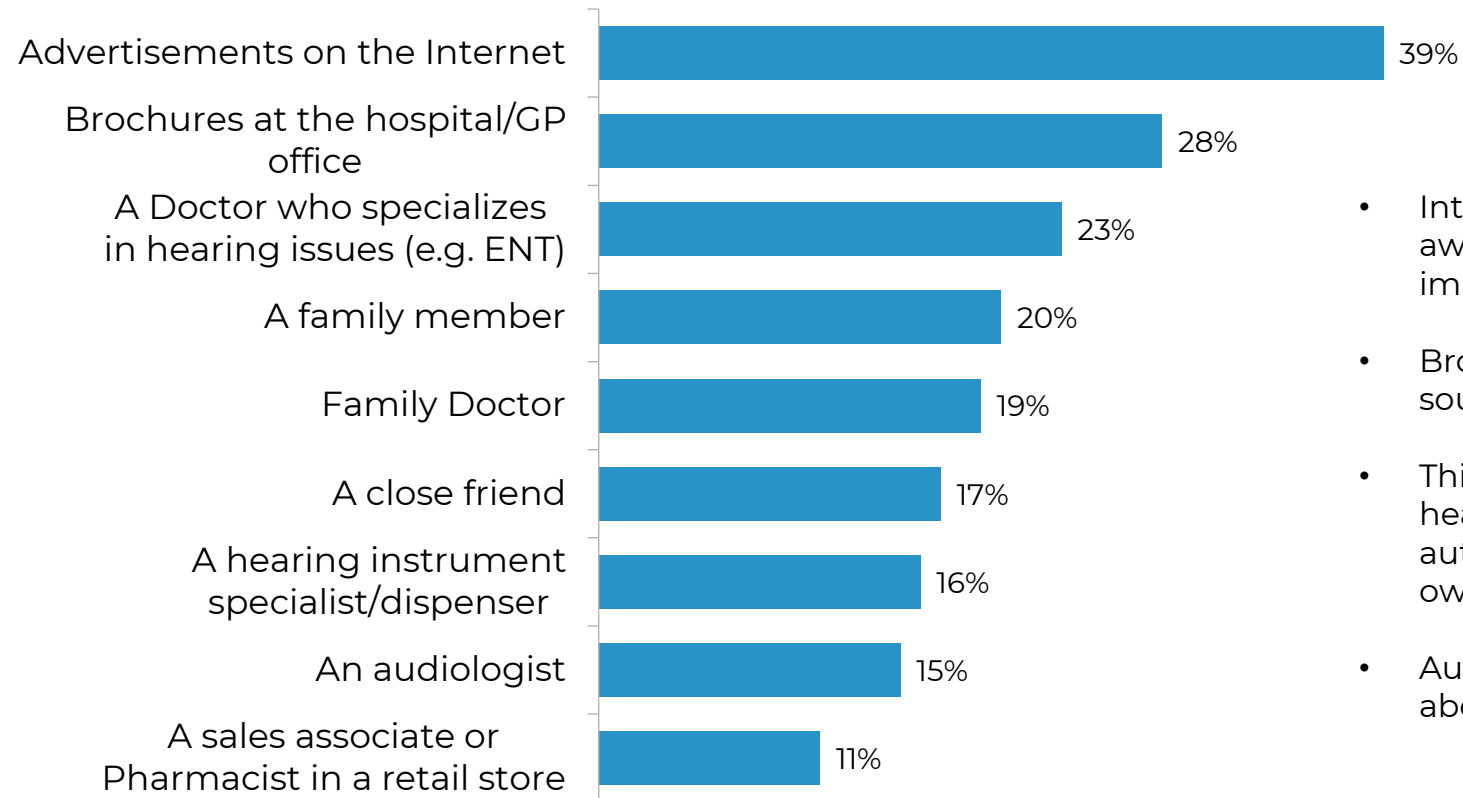


- Over one third (35%) of survey respondents claim to be very/somewhat familiar with the term 'cochlear implants'
- Awareness is highest amongst men (43%) than women (25%)
- In terms of age, 48% of those aged 35-44 are aware, compared with 20% of those aged 55-64 and 16% of those aged 65+
- Awareness is highest amongst those who have had treatment for their hearing difficulties (77%) compared with those seeking treatment (51%) and those not intending to receive treatment (15%)

A17: How familiar are you with 'cochlear implants'?

Base: All respondents. N=1,000

Source of awareness of Cochlear implants

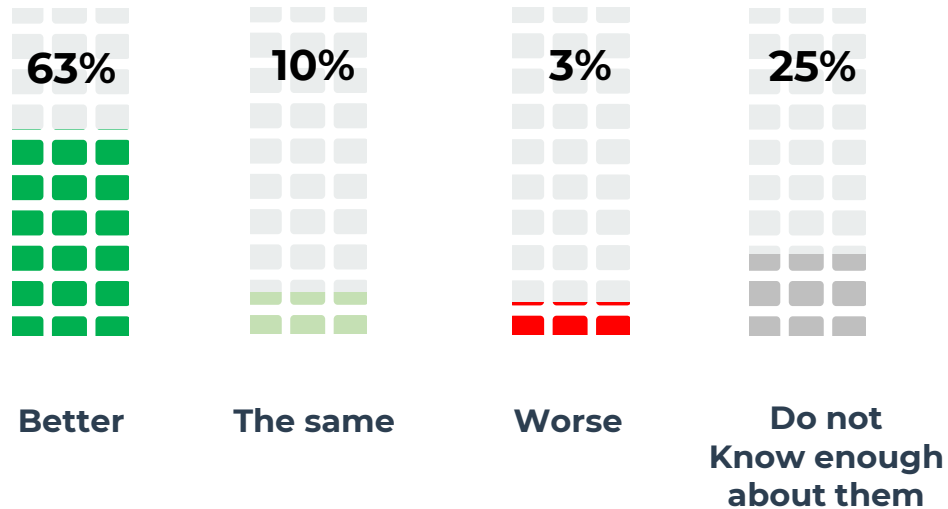


- Internet advertising is the greatest source of awareness for those who are familiar with cochlear implants
- Brochures at the hospital/GP office is a higher source of awareness than an ENT specialist
- This reinforces the suggestion that people with hearing difficulties are less inclined to seek authoritative information, preferring to find their own solutions in the first instance
- Audiologists ranked second to last on the list, only above sales staff or retail Pharmacists

A18: Where did you hear/have you heard about cochlear implants?

Base: All respondents familiar with cochlear implants. N=595

Attitudes to Cochlear implants



- Survey respondents have a generally positive view of cochlear implants, with almost two thirds (63%) believing them to be better than other options available (rising to 79% upon the base of cochlear implant users)
- 72% of men believe cochlear implants are better, compared to 48% of women, and the positive perception decreases with age
 - 35-44 71%
 - 45-54 62%
 - 55+ 38%

A19: Based on everything you know about cochlear implants, compared to other hearing devices available, would you say they are....

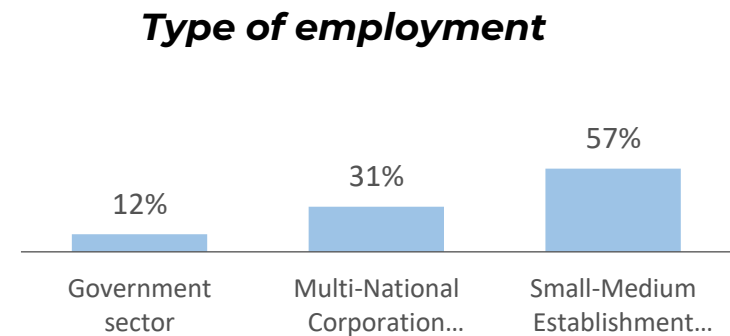
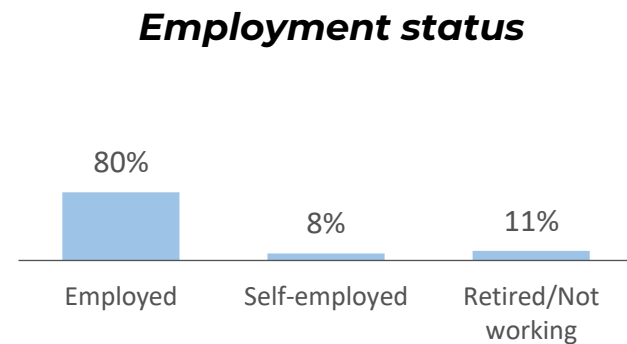
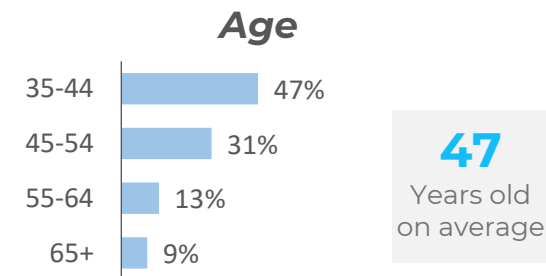
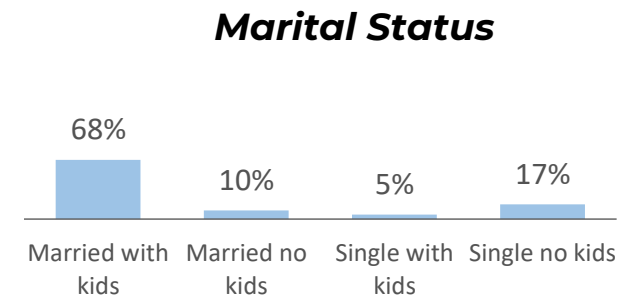
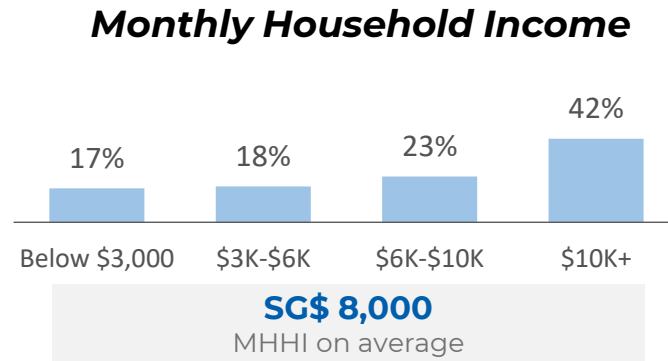
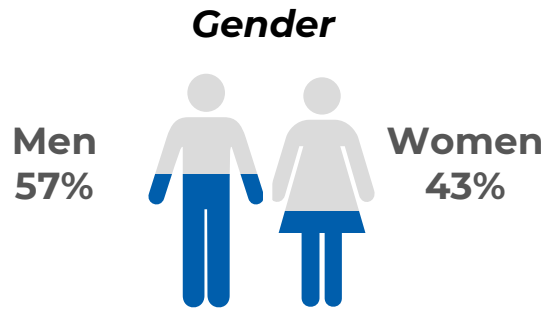
Base: All respondents familiar with cochlear implants. N=595



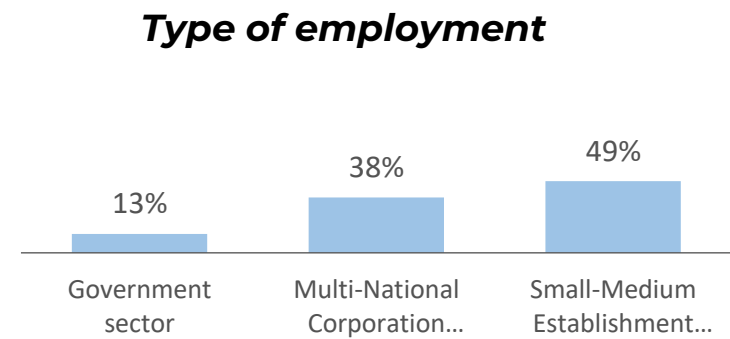
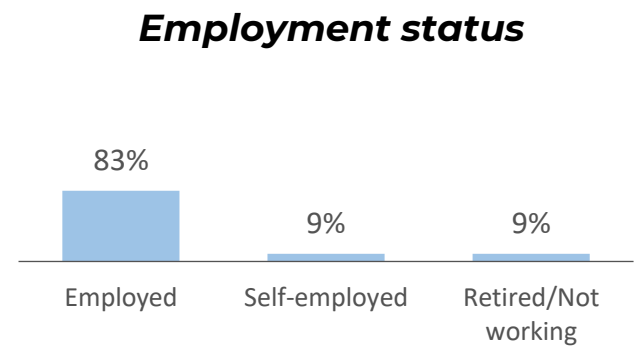
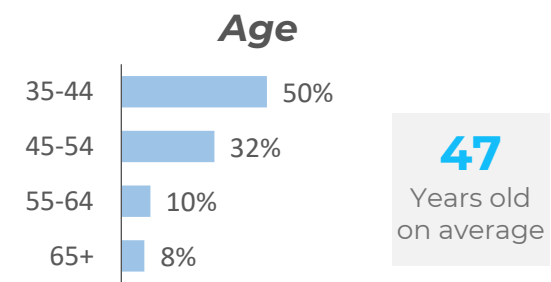
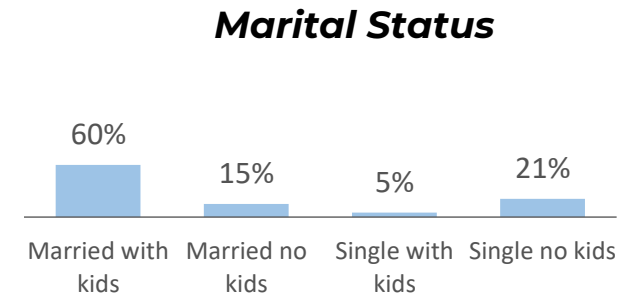
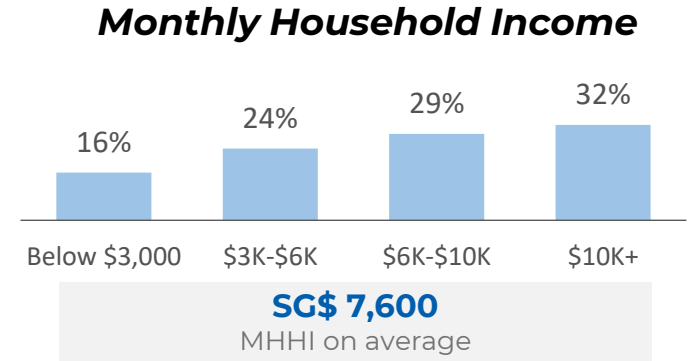
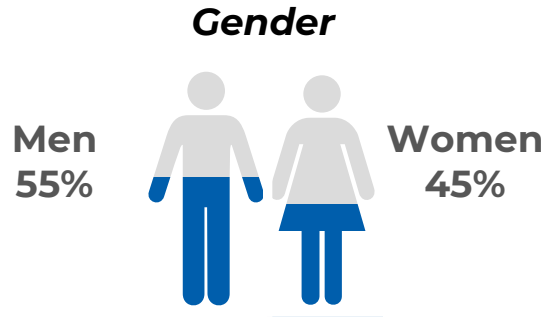
Appendix:

Respondent Profiles

Profiles: All respondents

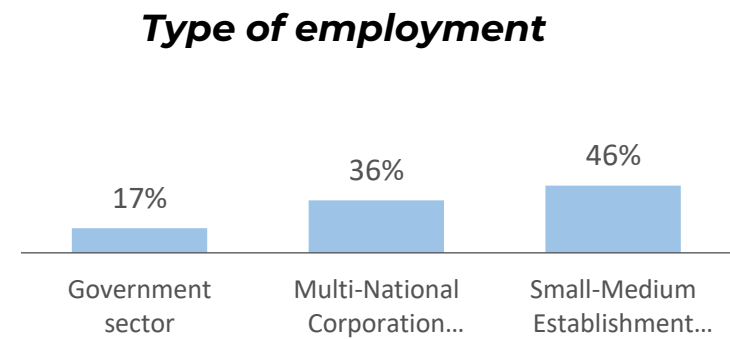
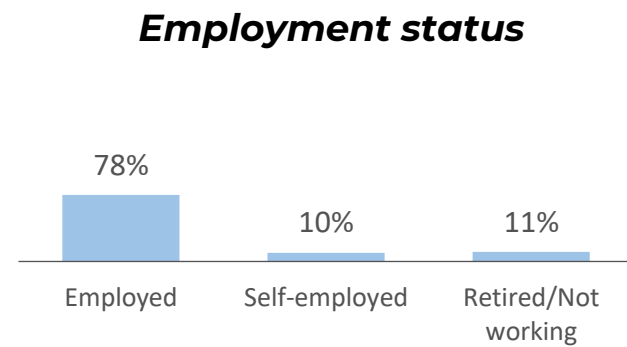
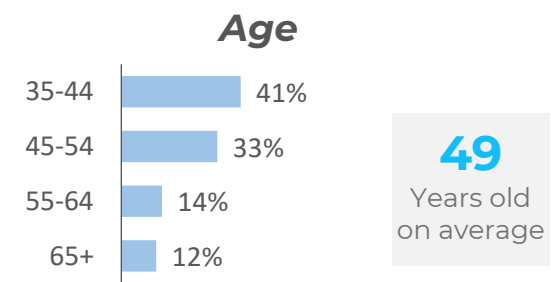
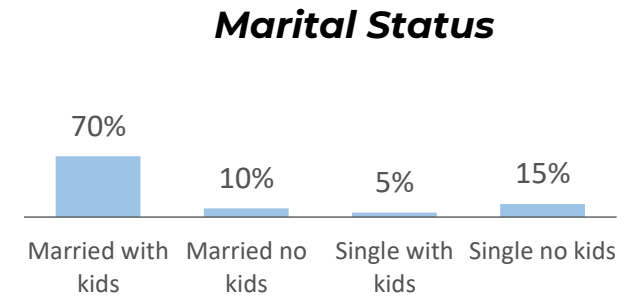
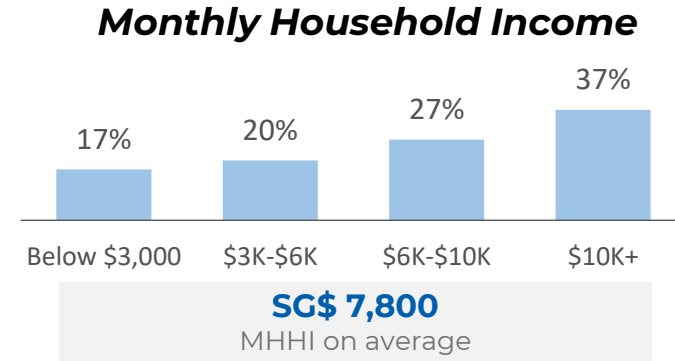
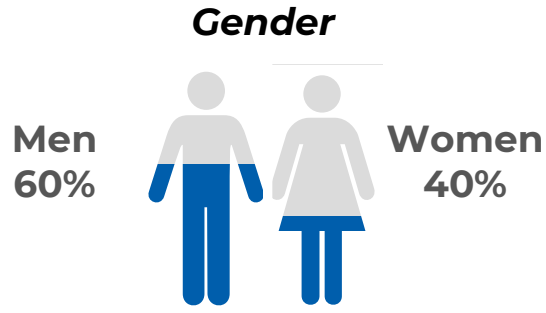


Profiles: All extremely concerned about their hearing health

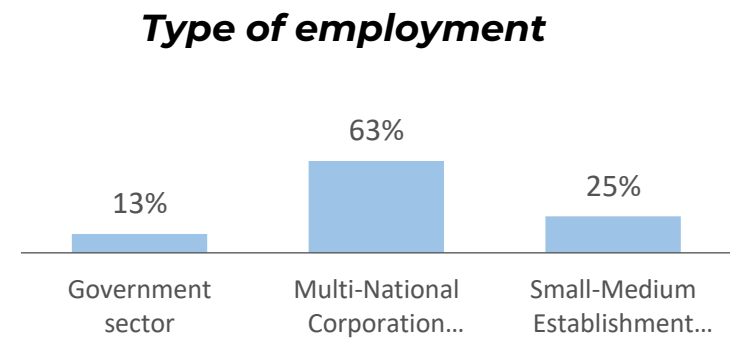
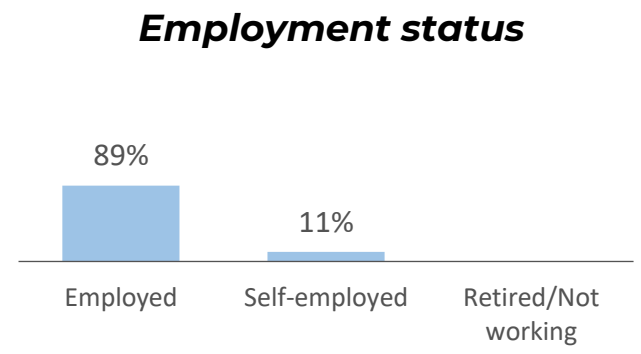
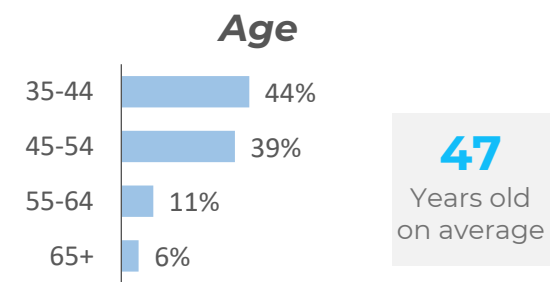
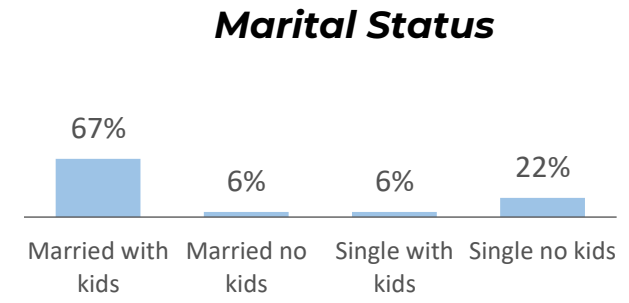
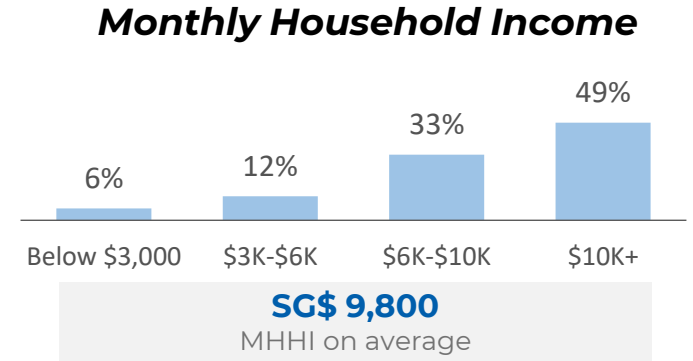
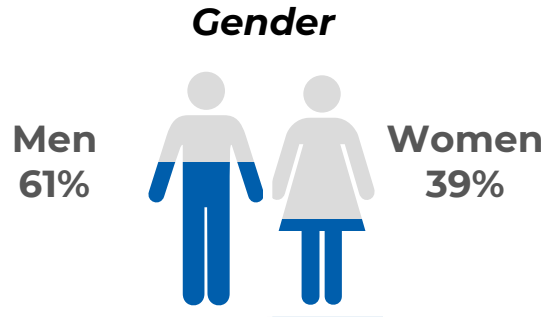


Base: All respondents extremely concerned with their hearing health. N=210

Profiles: All respondents with mild/moderate hearing difficulties



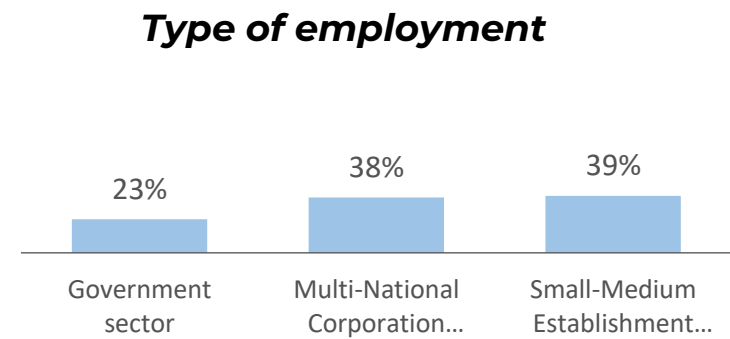
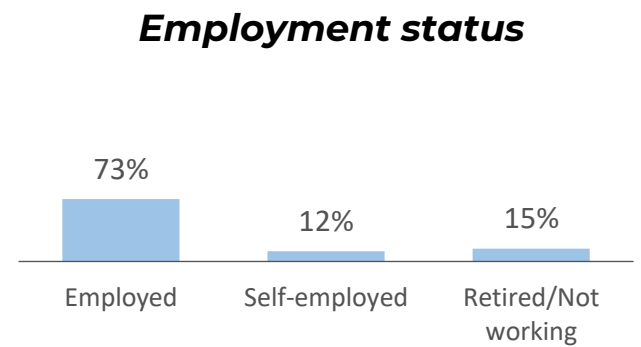
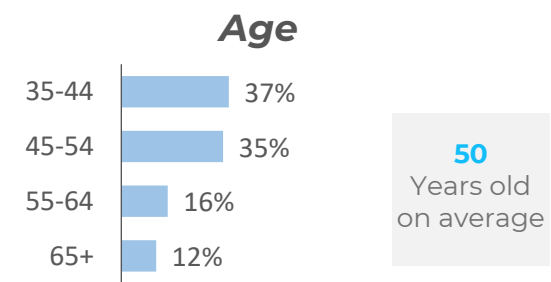
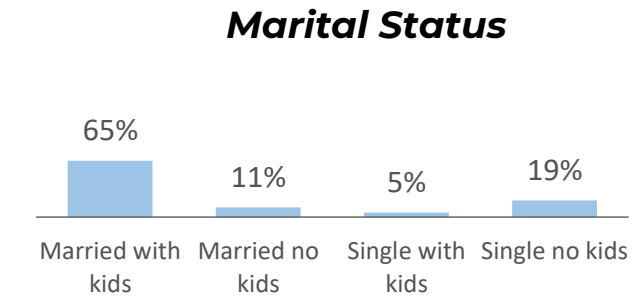
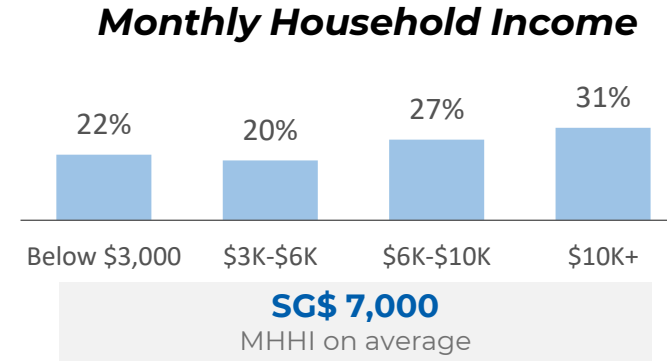
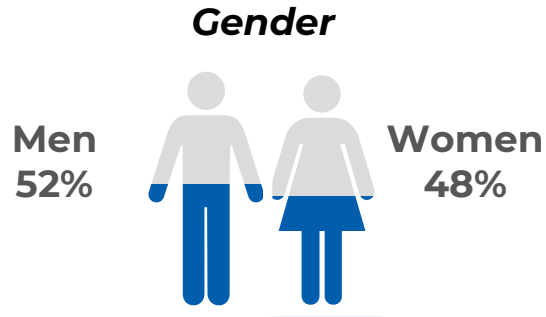
Profiles: All respondents with extreme hearing difficulties



Base: All respondents with extreme hearing difficulties. N=18 [CAUTION, LOW BASE, INDICATIVE ONLY]



Profiles: All not treating hearing difficulties



Base: All respondents with hearing difficulties, but not seeking treatment. N=116



Thank you

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