Results

EuroTrak 2017

1. Introduction
2. Market overview
3. Analysis of hearing aid owners
4. Analysis of hearing impaired non-owners
5. Appendix
1. Introduction

- EuroTrak 2017 was designed and executed by Anovum (Zurich) on behalf of beMedTech.

- Sample sizes Belgium 2017:
  - Representative sample (sample 1): n=14’245 people
  - Hearing impaired (sample 2): n=1’307 people
    - Hearing impaired non-owners: n=805 people with hearing loss (HL)
    - HA owners: n=502 people with hearing aid (HA)

- EuroTrak 2017 is part of the EuroTrak studies:
Summary
2. Market overview

- **Stated hearing loss prevalence**
  - Total: 9.6%, 18+: 11.5%
  - Binaural hearing loss: HA owners: 85%, HA non-owners: 57%.
  - Hearing Tests: 34% had a hearing test in the last 5 years, most tests are done by the ENT and at work/school

- **Hearing aid adoption rate (HA penetration)**
  - Total: 30.7%
  - Total age group 18+: 30.6%
  - 80% of HA owners have binaural treatment

- **The route to the hearing aid**
  - 70% of the hearing impaired discussed hearing loss with an ENT doctor or family doctor.
  - 40% got hearing aids recommended from the ENT or family doctor (drop out rate=43%).
  - 71% of the GP consultations referred to an ENT. 19% recommended no action.
  - 28% of ENT consultations referred to an audiencen, 38% recommended to get a hearing aid, 42% recommended no action.

- **Potential social cost-savings due to the use of hearing aids**
  - Hearing aids are believed to have a positive impact on the job.
  - Quality of sleep seems to improve if hearing impaired use hearing aids.
Summary
3. Analysis of hearing aid owners

- Hearing aid ownership and usage, accessories and Telecoil
  - 89% of all HA owners asked got some kind of 3rd party reimbursement.
  - 58% of the currently owned HAs were acquired in 2014 or later.
  - The average age of the currently owned HAs is 3.2 years.
  - The median age of hearing aids before replacement is 5 years.
  - On average, HAs are worn 9.4 hours a day.
  - 58% of today’s hearing aid owners are aware of their hearing aid brand, 50% would preferably choose the same brand if they would plan to obtain new hearing aids.
  - Only few HA owners use electronic accessories.
  - 21% of hearing aid owners know what Telecoil is but only 4% have used it – mainly in theatres/auditoriums.

- Importance of listening situations and satisfaction with HAs
  - 73% of the hearing aid owners say their hearing aid works better than or as expected.
  - 80% of the HA owners are satisfied with their HAs.
  - If the HA is worn more than 8 hours per day, the satisfaction is significantly higher.
  - Satisfaction with newer hearing aids is higher than with older hearing aids.
  - Talking at home with family members and on the phone are the most important listening situations.

- Positive impact of HAs
  - Significant positive impact of HAs on different aspects: Especially communication effectiveness, social life and ability to participate in group activities improve with hearing aids.
  - 95% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.
Summary

4. Analysis of hearing impaired non-owners

- Reasons not to own/use HAs
  - While 62% of the hearing impaired without hearing aids don’t know whether a third party would pay any part of hearing aids - 89% of the hearing aid owners received some kind of 3rd party reimbursement.
  - The main reasons for not having hearing aids are that people say “they do not work well in noisy situations”, “they hear well enough”, ”they do not restore hearing to normal” and “hearing loss is not severe enough”.
  - 5% who own HAs don’t use them at all; 13% use them one hour or less per day. Main reasons for this are: “they do not work well in noisy situations” and “hear enough in most situations”.

- Social rejection, buying intentions and triggers to buy
  - 89% of hearing aid owners think people rarely or never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.
  - The most important influencing factors for getting hearing aids are worsening hearing loss, followed by the ENT. Price and insurance coverage is (more) important for the current non owners.
  - 8% of non-owners intend to get a hearing aid within the next year.
1. **Introduction**
   - Organisation of EuroTrak 2017
   - Recruitment process: In search of hearing impaired people

2. **Market overview**
   - Prevalence of hearing loss and hearing aid adoption rate
   - Hearing tests and where hearing is tested
   - The route to the hearing aid: Sources of information and drop-out rates
   - Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms, sleep quality

3. **Analysis of hearing aid owners**
   - Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
   - Awareness and usage of accessories and Telecoil
   - Satisfaction with hearing aids and drivers
   - Importance of listening situations
   - Positive impact of hearing aids, quality of life

4. **Analysis of hearing impaired non-owners**
   - Reasons for not having hearing aids and why some people can consider hearing aids as uncomfortable
   - Social rejection because of hearing loss compared to the acceptance of hearing aids
   - Buying intentions and most important triggers to buy

5. **Appendix**
   - Demographics: Hearing instrument adoption rates and populations
Results

EuroTrak 2017

1. Introduction
2. Market overview
3. Analysis of hearing aid owners
4. Analysis of hearing impaired non-owners
5. Appendix

Creative Market Research
1. Introduction
Organisation of EuroTrak 2017

Organisation

- Principal of the project EuroTrak is beMedTech.
- Anovum Zurich developed the concept of EuroTrak, designed the questionnaire and conducted the fieldwork in cooperation with a panel company. Furthermore, Anovum analysed the data and prepared the presentation.
- The European Hearing Instrument Manufacturers Association [EHIMA] approved the questionnaire.

Use of the data

- beMedTech may use the anonymous data (delivered tables, charts, reports) and conclusions of the survey for further research projects, for archiving and publication in any form whatsoever.

  - The raw dataset remains at Anovum. If beMedTech uses anonymous data (delivered tables, charts, reports) and conclusions of the survey for publications, the source of the data needs to be mentioned in the following way:

    “Source: Anovum – EuroTrak/ [year]/ n=[relevant sample size]”

- Any member of beMedTech can ask Anovum to further analyse the raw data in specific ways at their own expense.

- beMedTech companies can order a report with satisfaction scores for their brand. The other brands will be shown as benchmarks without denomination (brand A, brand B etc.). The report will show all satisfaction values. It is not allowed to communicate any information from these reports outside the beMedTech company.
Recruitment process: In search of hearing impaired people

**Step 1: Screening interviews**

Objective: Prevalence of hearing loss and hearing aid ownership

Process:
1. Representative sample with strict quotas that represent the overall population (Age/Gender interlocked; soft quota on region)
2. Contacts from large panelist pools
3. Screening questionnaire: Stated hearing loss and hearing aid usage + demographics
4. Result: Representative sample of 14,245 people based on census data.

**Step 2: Target population interviews**

Objective: Details about satisfaction with hearing aids and reasons for non-adoption

Process:
1. Main questionnaires: Owners and hearing impaired non-owners
2. Balancing through weighting according to representative screening interviews
3. Resulting sample: 502 hearing aid owners and 805 hearing impaired non-owners
2. Market overview
Prevalence of hearing loss and adoption rate
Hearing loss and hearing instrument ownership by gender/age
Hearing loss prevalence in Belgium 2017

% hearing loss prevalence

- Total 18+: 11.5%
- 74+: 33.7%
- 65-74: 18.6%
- 55-64: 11.7%
- 45-54: 9.8%
- 35-44: 6.0%
- 25-34: 3.7%
- 15-24: 2.9%
- <=14: 2.3%

EuroTrak 2017
Base: 14'245
Overview hearing loss prevalence and hearing aid adoption

EuroTrak Belgium 2017

- Hearing impaired (stated)
- Adoption (% of population)
- Adoption (% of stated impaired)
Hearing aid adoption rate Belgium 2017
30.7% of hearing impaired have hearing aid(s), 80% of them have binaural treatment
The more severe the hearing loss, the higher the adoption rate

* Construction of 6-groups: A factor analysis was performed to identify one factor “degree of hearing loss”. The following questions were included in the factor:
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC – like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).

HA-non-owner, n=805
HA-owner, n=502
# Hearing loss

## Hearing loss characteristics: Owners compared to non-owners

<table>
<thead>
<tr>
<th></th>
<th>HA-Non-owner n=805</th>
<th>HA Owner n= 502</th>
<th>Hearing Aid Adoption (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired (stated)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>43%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>57%</td>
<td>85%</td>
<td>43%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>41%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Moderate</td>
<td>44%</td>
<td>39%</td>
<td>29%</td>
</tr>
<tr>
<td>Severe</td>
<td>13%</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>Profound</td>
<td>3%</td>
<td>20%</td>
<td>61%*</td>
</tr>
</tbody>
</table>

n’s are unweighted whereas the shown results are weighted * combined severe and profound because n is too small
Hearing tests and where hearing is tested
Hearing Tests: 34% had their hearing tested in the last 5 years – most tests are done by the ENT and at work or school

Have you ever taken a hearing test?

- Yes, in the last 12 months: 13%
- Yes, in the last 1-5 years: 21%
- Yes, more than 5 years ago: 45%
- No, never: 21%

Where/how was your hearing tested?

- ENT: 34%
- Audiolog, Audicien: 20%
- Family doctor: 7%
- Online test: 1%
- Test on a smartphone App: 0%
- Other: 40%
- Don't know: 4%

Base=10'744
Base= 3'472

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The route to the hearing aid: Sources of information and drop-out rates
Doctors and hearing care professionals are the most important source of information and therefore the major gatekeepers.

Where did you gather information about hearing aids?
Please check all that apply.

- Family doctor, ear doctor (ENT), audioloog/audicien
- Conversations with friends, relatives already fitted with a hearing aid
- Internet research combined
- Print ads received in your mailbox
- Internet research: websites of hearing aids manufacturers
- Articles in magazines or newspapers
- Internet research: websites of hearing aid clinics
- Internet research: other websites, google...
- I did not gather information about hearing aids
- Other

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Of those who discussed the hearing loss with a doctor, 55% talked to an ENT first

Those who discussed hearing loss with family doctor and/or ENT: Who was the doctor you discussed your hearing loss with for the first time – your family doctor or the ENT specialist?

- 55% Ear doctor (ENT specialist)
- 45% Your family doctor

Total n= 880

- Hearing aid (n=437) 61%
  - 39% Your family doctor
  - 61% Ear doctor (ENT specialist)

- Hearing loss but no hearing aid (n=443) 48%
  - 52% Your family doctor
  - 48% Ear doctor (ENT specialist)
The route to the hearing aid

Base: n=1'307

- Impaired: 100%
- ENT/Doctor: 70%
- Recommend: 40%
- Positive advice audicen: 39%
- 31% Owner: 31%

Drop out:
- Impaired: 30%
- ENT/Doctor: 43%
- Recommend: 23%

All hearing impaired
Discussed hearing loss with ear doctor and/or family doctor
Positive medical advice (Ear doctor or family doctor recommend further action)
Discussed hearing loss with audicen
Positive advice audicen
Bought hearing aid
Much higher drop-out-rates for the lower hearing loss segments

Top 50% hearing loss*

Low 50% hearing loss*

* Construction of 6-groups: A factor analysis was performed to identify one factor “degree of hearing loss”. The following questions were included in the factor:
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC – like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).
The route to the hearing aid: GP/Family doctor

Have you discussed your hearing problem with your family doctor?

% Discussed with GP

- Total hearing impaired: 44%
- HA owner: 57%
- Hearing impaired non-owners: 38%

What did he/she recommend?

**HA owner (Base: 276)**
- Referred to an ear doctor (ENT): 84%
- Referred to an audicien: 14%
- Recommended to get a hearing aid: 14%
- Recommended no further action: 3%

**Impaired non-owner (Base: 299)**
- Referred to an ear doctor (ENT): 62%
- Referred to an audicien: 9%
- Recommended to get a hearing aid: 2%
- Recommended no further action: 30%
The route to the hearing aid: ENT

Have you discussed your hearing problem with an ear doctor (ENT)?

- Total hearing impaired: 60%
- HA owner: 88%
- Hearing impaired non-owners: 47%

What did he/she recommend?

**HA owner (Base: 434)**
- Referred to an audicien: 45%
- Did prescribe a hearing aid: 68%
- Recommended no further action: 2%

**Impaired non-owner (Base: 366)**
- Referred to an audicien: 13%
- Did prescribe a hearing aid: 12%
- Recommended no further action: 76%
The route to the hearing aid: Audicien

Have you discussed your hearing problem with an audicien?

% Discussed with audicien

- Total hearing impaired: 39%
- HA owner: 79%
- Hearing impaired non-owners: 21%

What did he/she recommend?

- HA owner (Base: 383)
  - Recommended to get a hearing aid: 99%
  - Recommended not to get a hearing aid: 1%

- Impaired non-owner (Base: 179)
  - Recommended to get a hearing aid: 49%
  - Recommended not to get a hearing aid: 51%

EuroTrak 2017

Base: 1'307
Recommendations by profession

- **GP (N=575)**
  - Referred to an ear doctor (ENT): 71%
  - Referred to an audicien: 11%
  - Recommended to get a hearing aid: 19%
  - Recommended no further action: 6%

- **ENT (N=800)**
  - Referred to an ear doctor (ENT): 28%
  - Referred to an audicien: 38%
  - Recommended to get a hearing aid: 42%
  - Recommended no further action: 19%

- **Audicien (N=562)**
  - Referred to an ear doctor (ENT): 81%
  - Recommended to get a hearing aid: 19%
Potential social cost-savings due to the use of hearing aids: Work competitiveness, depressive and dementia symptoms, sleep quality
Work competitiveness: 84% of the working hearing aid owners state their hearing aid(s) are useful on their job.

How useful are your hearing aids on your job?

- 60% Of significant use
- 24% Of some use
- 16% Of no use

Base: N=39

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**Work competitiveness:** People with hearing aids recognize that hearing aids increase the chance of hearing impaired to get promoted, to get the right job and to get more salary.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Hearing aid</th>
<th>Hearing loss, no hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>I think that people with an untreated hearing loss tend to be less promoted in their job</td>
<td>9% 9% 42% 23% 17%</td>
<td>35% 21% 32% 9% 3%</td>
</tr>
<tr>
<td>I think that people with an untreated hearing loss tend not to get the job they deserve</td>
<td>9% 8% 42% 24% 17%</td>
<td>35% 23% 31% 8% 3%</td>
</tr>
<tr>
<td>I think that people with an untreated hearing loss tend to be under salaried</td>
<td>10% 17% 53% 13% 8%</td>
<td>39% 23% 33% 4%</td>
</tr>
</tbody>
</table>

Base: Hearing loss, no hearing aid = 488; hearing aid n = 306
**General health problems**: Hearing aid owners have a lower risk of becoming depressive compared to impaired non-owners with comparable hearing loss (Top50% hearing loss group*).

**Depression symptoms:**

PHQ-2 Screening:

In the last 2 weeks:
- Little interest or pleasure
- Feeling down, depressed, hopeless

**Probability of major depressive disorder**

<table>
<thead>
<tr>
<th></th>
<th>Hearing aid</th>
<th>Top 50% hearing loss, no hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>very high</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>medium</td>
<td>45%</td>
<td>59%</td>
</tr>
<tr>
<td>very low</td>
<td>54%</td>
<td>39%</td>
</tr>
</tbody>
</table>

**Dementia symptom:**

Getting more forgetful in the last year?

**Probability of major depressive disorder**

<table>
<thead>
<tr>
<th></th>
<th>Hearing aid</th>
<th>Top 50% hearing loss, no hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes, much more</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Yes, somewhat more</td>
<td>50%</td>
<td>52%</td>
</tr>
<tr>
<td>No</td>
<td>47%</td>
<td>43%</td>
</tr>
</tbody>
</table>

Base: hearing aid n=398 / top 50% no hearing aid =191

*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC – like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise
- People were segmented into 6 groups of same size (16.67% of all hearing impaired in the sample).
General health problems: Compared to impaired hearing aid non-owners with significant hearing loss (Top 50% hearing loss*), hearing aid owners feel less exhausted in the evenings.

In the evenings I often feel physically exhausted:
- Hearing aid: 18% Disagree strongly, 30% Rather disagree, 27% Neutral, 21% Rather agree, 6% Strongly agree.
- Top 50% hearing loss, no hearing aid: 11% Disagree strongly, 20% Rather disagree, 22% Neutral, 31% Rather agree, 15% Strongly agree.

In the evenings I often feel mentally exhausted:
- Hearing aid: 21% Disagree strongly, 33% Rather disagree, 27% Neutral, 15% Rather agree, 3% Strongly agree.
- Top 50% hearing loss, no hearing aid: 16% Disagree strongly, 24% Rather disagree, 26% Neutral, 22% Rather agree, 13% Strongly agree.

Base: hearing aid n=398 / top 50% no hearing aid =191

*Construction of 6-groups: A factor analysis was performed to identify one factor "degree of hearing loss". The following questions were included in the factor:
- Number of ears impaired (one or two)
- Stated hearing loss (Mild to Profound)
- Scores on 6 APHAB-EC – like questions (Scaled 1-5)
- When NOT using a hearing aid, how difficult is it for you to follow conversations in the presence of noise

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General health problems: Quality of sleep seems to improve if hearing impaired use hearing aids

Are you generally satisfied with the quality of your sleep?

- Top 50% hearing loss, no hearing aid (n=191)
  - No: 39%
  - Yes: 61%

- Hearing aid (n=398)
  - No: 22%
  - Yes: 78%
3. Analysis of hearing aid owners
Hearing aid ownership, awareness of hearing loss before getting hearing aids, lifetime of hearing aids and usage
Very low adoption rates within mild hearing loss

<table>
<thead>
<tr>
<th>Stated hearing loss</th>
<th>(% of impaired population*)</th>
<th>Adoption rate %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profound</td>
<td>(8%)</td>
<td>2% 6%</td>
</tr>
<tr>
<td>Severe</td>
<td>(19%)</td>
<td>9% 11%</td>
</tr>
<tr>
<td>Moderate</td>
<td>(42%)</td>
<td>30% 12%</td>
</tr>
<tr>
<td>Mild</td>
<td>(30%)</td>
<td>28% 2%</td>
</tr>
</tbody>
</table>

Base: n=1'307

Sums can differ from 100% due to rounding
* combined "severe" and "profound" because n is too small

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58% of the currently owned HAs were acquired in 2014 or later

Age of currently owned HAs (Mean): 3.2 years

HA-owner, n=561
On average 3 years pass between becoming aware of the hearing loss and the purchase of hearing aids. Hearing aids are used for 5 years before they are being replaced.

Thinking back before you purchased your first hearing aid: How many years have passed since you became aware of your hearing loss until you purchased a hearing aid?

- 1 year: 24%
- 2 years: 21%
- 3 years: 28%
- 4-6 years: 15%
- More than 6 years: 12%

Base: n=296

Current HAs = first HAs?

- Yes: 59%
- No: 41%

HA-owner, n=502

How many years did you own your previous HAs?

- 1-3 years: 5%
- 4-6 years: 62%
- 7-10 years: 20%
- 11 years or longer: 13%

Base: n=158

Age of HA before it has been replaced: 5 years (median)
89% received some kind of 3rd party reimbursement.
Information deficit non-owners: Only 28% know whether
government/insurance would pay

**Owners:** Was any part or all of your hearing aid(s) paid for by a third party? (Insurance, Government, …)

- Yes, completely: 82%
- Yes, partly: 7%
- No: 4%
- don't know: 7%

**Non-owners:** Based on your current knowledge, would any part or all of your hearing aid(s) be paid for by a third party? (Insurance, Government, …)

- Yes: 28%
- No: 62%
- don't know: 10%

HA-owner, n=502
HA-non-owners, n=805
On average, HAs are worn 9.4 hours a day

HA owned, n=502

HA worn:
Mean: 9.4 hours/day

In the drawer (0 hours): 5%
58% of today’s hearing aid owners are aware of their hearing aid brand

Are you aware of the brand of your hearing aid(s)?

- 58% Yes, I know it by heart
- 30% No, but I could find out
- 12% No, and can’t find out

In case you plan to obtain new hearing aid(s), what brand would you choose?

- 50% Preferably from the same brand you currently own
- 44% Preferably from a different brand than you currently own
- 6% Indifferent, could be any brand

Base: N=500/442

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82% of the currently owned HAs either had no repair need or only once

How often has your current hearing aid required a repair because it was not working properly?

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Awareness and usage of accessories and Telecoil
Ownership of accessories is generally very low

Which of the following accessories have you heard of and which ones do you own?

<table>
<thead>
<tr>
<th>Accessory</th>
<th>Never heard of this before</th>
<th>Heard of this before but don't own one</th>
<th>I own one</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV Box connected to the tv set to stream audio to your hearing aid</td>
<td>47%</td>
<td>44%</td>
<td>9%</td>
</tr>
<tr>
<td>Audio streamer to connect my hearing aids to other devices like cell phones, mp3 players, tv sets, etc</td>
<td>52%</td>
<td>40%</td>
<td>8%</td>
</tr>
<tr>
<td>Phone clip, plugged into the mobile phone to stream calls to the hearing aid</td>
<td>60%</td>
<td>36%</td>
<td>4%</td>
</tr>
<tr>
<td>Combined device - audio streamer and remote control in one device</td>
<td>59%</td>
<td>38%</td>
<td>3%</td>
</tr>
<tr>
<td>Additional microphone for conversations with one person, conversations in a group etc.</td>
<td>55%</td>
<td>42%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Base: N=502
21% of hearing aid owners know what Telecoil is and only 4% have used it – mainly at theatres/auditoriums. 59% of those who use it are satisfied.

**Have you seen this logo before?**
- Yes, and I know what it stands for: 21%
- Yes, but I don't know what it stands for: 56%
- No, have never seen this: 23%

**Are your hearing aids equipped with Telecoil?**
- Yes, and I have already used Telecoil: 4%
- Yes, but have never used it: 6%
- No: 64%
- I don't know: 27%

**On what type of venues have you used hearing aids in a hearing loop (Telecoil)?**
- Theater, auditorium: 84%
- House of worship: 34%
- Conference room: 31%
- School, university: 13%
- Home: 11%
- Drive thru, ticket window, bank counter: 3%
- Airport, train station: 2%
- Court room: 0%

**How satisfied are you with the use of Telecoil overall?**
- Very satisfied: 42%
- Satisfied: 9%
- Somewhat satisfied: 8%
- Neutral: 17%
- Dissatisfied: 17%
- Very dissatisfied: 6%

HA-owner, n=502

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Satisfaction with hearing aids and drivers
74% of the hearing aid owners say their hearing aid works better than or as expected

How have the expectations you had towards hearing aids before trying them on for the first time been met?

- 53% hearing aids work worse than I expected
- 21% hearing aids work as I expected
- 27% hearing aids work better than I expected

Base: N=502
Overall satisfaction with HA: Highest satisfaction for the following groups: ITC’s, purchased 2014 or after, worn more than 8 hrs/day
## Satisfaction with current hearing aids

### Dispenser
- Professionalism of dispenser: 93%
- Quality of dispensers counseling: 91%
- Quality of service after purchase: 91%
- Quality of service during hearing aid fitting period: 91%

### Sound quality
- Natural sounding: 78%
- Richness or fidelity of sound: 75%
- Clarity of tone and sound: 75%
- Comfort with loud sounds: 68%

### Product features
- Ease of changing battery: 90%
- Reliability: 87%
- Overall fit/ Comfort: 85%
- Visibility to others: 84%
- Managing whistling/feedback/buzzing: 74%
- Battery life: 71%
- Value (performance versus money spent): 69%

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<table>
<thead>
<tr>
<th>%dissatisfied</th>
<th>%satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>% very dissatisfied + % dissatisfied + % somewhat dissatisfied</td>
<td>% somewhat satisfied + % satisfied + % very satisfied</td>
</tr>
</tbody>
</table>

HA-owner, n=502
# Satisfaction with current hearing aids

<table>
<thead>
<tr>
<th>Listening situation</th>
<th>% dissatisfied</th>
<th>% satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversation with one Person</td>
<td>8%</td>
<td>87%</td>
</tr>
<tr>
<td>At home with family members</td>
<td>9%</td>
<td>82%</td>
</tr>
<tr>
<td>When talking to children</td>
<td>10%</td>
<td>78%</td>
</tr>
<tr>
<td>In a store, when shopping</td>
<td>10%</td>
<td>77%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>9%</td>
<td>75%</td>
</tr>
<tr>
<td>When riding in a car</td>
<td>8%</td>
<td>75%</td>
</tr>
<tr>
<td>Listening to Music</td>
<td>10%</td>
<td>75%</td>
</tr>
<tr>
<td>Conversation in small groups</td>
<td>15%</td>
<td>73%</td>
</tr>
<tr>
<td>Watching TV</td>
<td>15%</td>
<td>73%</td>
</tr>
<tr>
<td>On the telephone</td>
<td>15%</td>
<td>73%</td>
</tr>
<tr>
<td>At a movie theater</td>
<td>16%</td>
<td>68%</td>
</tr>
<tr>
<td>Conversation in large groups</td>
<td>28%</td>
<td>63%</td>
</tr>
<tr>
<td>Leisure activities</td>
<td>13%</td>
<td>61%</td>
</tr>
<tr>
<td>In a larger lecture hall (e.g., theater, concert hall)</td>
<td>26%</td>
<td>60%</td>
</tr>
<tr>
<td>In the workplace</td>
<td>10%</td>
<td>57%</td>
</tr>
<tr>
<td>In school or a classroom (as an observer or student)</td>
<td>17%</td>
<td>55%</td>
</tr>
<tr>
<td>Use in noisy situations</td>
<td>34%</td>
<td>53%</td>
</tr>
</tbody>
</table>

\[
\%\text{dissatisfied} = \%\text{very dissatisfied} + \%\text{dissatisfied} + \%\text{somewhat dissatisfied}
\]

\[
\%\text{satisfied} = \%\text{somewhat satisfied} + \%\text{satisfied} + \%\text{very satisfied}
\]

*HA-owner, n=502*
Factors influencing satisfaction with current HA: Sound quality/signal processing is most important for overall satisfaction with HA

- **Dispenser**
  - Professionalism of dispenser
  - Quality of service during hearing aid fitting period
  - Quality of service after purchase
  - Quality of dispensers counseling

- **Sound quality signal process.**
  - Natural sounding
  - Clearness of tone and sound
  - Richness or fidelity of sound
  - Comfort with loud sounds

- **Product features**
  - Value (performance versus money spent)
  - Reliability
  - Overall fit/ Comfort
  - Managing whistling/feedback/buzzing
  - Ease of changing battery
  - Visibility to others
  - Battery life

*The influence has been calculated with a correlation: 0 means no relation between a criterion and overall satisfaction; 1 means a maximal relationship. Read: clearness of tone and sound is the most important criterion for satisfaction.*
Frequency of important listening situations

In which of these situations is it most important for you to hear well? (choose up to 5)

- At home with family members: 55%
- When talking on a phone: 50%
- In conversations with 1 person: 45%
- In conversations with small groups: 45%
- In conversations with large groups: 42%
- In noisy situations: 35%
- When watching TV with others: 29%
- In a larger lecture hall (e.g., theater, concert hall, place of worship, etc.): 28%
- In the workplace: 24%
- When talking to children: 19%
- When riding in a car: 15%
- When listening to music: 14%
- In a store, when shopping: 10%
- During leisure activities (e.g., exercising, taking a walk, etc.): 10%
- Outdoors: 9%
- In school or a classroom (as an observer or student): 8%
- At a movie theater: 3%

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Positive impact of hearing aids, quality of life
Significant positive impact of HAs on different aspects: Especially communication effectiveness, social life and ability to participate in group activities improve with hearing aids.

- Communicate more effectively in most situations
- Social life
- Ability to participate in group activities
- Relationships at home
- Sense of independence
- Sense of safety
- Feelings about yourself
- Confidence in yourself
- Relationships at work
- Mental/emotional health
- Mental ability
- Physical health

HA-owner, n=502
Impact of HAs is perceived more positive by patients with a Top 50% hearing loss in all aspects

% of HA owners feeling better/a lot better

- Communicate more effectively in most...
- Able to participate in group activities
- Relationships at home
- Sense of independence
- Sense of safety
- Feelings about yourself
- Confidence in yourself
- Relationships at work
- Mental/emotional health
- Mental ability
- Physical health

Low 50% hearing loss (n=105)  Top 50% hearing loss (n=354)
Even for other people in the household/relatives, the situation improves when the person with hearing loss starts wearing hearing aids.

How did the following aspects change since person X is wearing hearing aids?

- **Communication with Person**
  - a lot worse: 7%
  - worse: 33%
  - the same: 35%
  - better: 24%

- **Social activities together with Person**
  - a lot worse: 5%
  - worse: 54%
  - the same: 23%
  - better: 16%

- **Personal relationship with Person**
  - a lot worse: 8%
  - worse: 67%
  - the same: 19%
  - better: 11%

- **Quarrels/disputes with Person**
  - a lot worse: 8%
  - worse: 75%
  - the same: 12%
  - better: 9%

Someone in HH / parent has HA, n=410
95% of hearing aid owners declare that their hearing aids improve their quality of life at least sometimes.

How often do your hearing aids improve your quality of life?

- Never: 59%
- Rarely: 9%
- Occasionally: 27%
- Regularly: 5%

Base: N=502
4. Analysis of hearing impaired non-owners
Reasons for not having hearing aids and why some people can consider hearing aids as uncomfortable
To analyse reasons of non-adoption we look at the Top 50% HL group, as the structure of hearing loss is more similar to that of HA owners.

Hearing loss characteristics: Owners compared to non-owners

<table>
<thead>
<tr>
<th></th>
<th>% HA Owner (n=502)</th>
<th>%HA-Non-owner Low 50% HL (n=394)</th>
<th>%HA-Non-owner Top 50% HL (n=232)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ears impaired</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unilateral loss</td>
<td>15%</td>
<td>47%</td>
<td>35%</td>
</tr>
<tr>
<td>Bilateral loss</td>
<td>85%</td>
<td>53%</td>
<td>65%</td>
</tr>
<tr>
<td><strong>Perceived loss</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mild</td>
<td>7%</td>
<td>49%</td>
<td>9%</td>
</tr>
<tr>
<td>Moderate</td>
<td>39%</td>
<td>43%</td>
<td>51%</td>
</tr>
<tr>
<td>Severe</td>
<td>34%</td>
<td>6%</td>
<td>33%</td>
</tr>
<tr>
<td>Profound</td>
<td>20%</td>
<td>1%</td>
<td>7%</td>
</tr>
</tbody>
</table>

More similar hearing loss-structure
Top 10 reasons for not having a hearing aid (I/II)

- They do not work well in noisy situations: 51% Reason, 12% Somewhat a reason, 36% Not a reason
- Hear well enough in most situations: 38% Reason, 23% Somewhat a reason, 40% Not a reason
- They do not restore your hearing to normal: 45% Reason, 15% Somewhat a reason, 41% Not a reason
- Hearing loss not severe enough: 34% Reason, 23% Somewhat a reason, 44% Not a reason
- Uncomfortable: 38% Reason, 16% Somewhat a reason, 46% Not a reason
- Ear doctors opinion (ENT): 39% Reason, 10% Somewhat a reason, 51% Not a reason
- Have more serious priorities: 34% Reason, 14% Somewhat a reason, 51% Not a reason
- Have tinnitus (ringing in ears): 39% Reason, 5% Somewhat a reason, 56% Not a reason
- Cannot afford a hearing aid: 34% Reason, 9% Somewhat a reason, 57% Not a reason
- Have hearing loss only with high pitch sounds: 21% Reason, 18% Somewhat a reason, 62% Not a reason

Base: non owners Top 50% HL: n=232
Less important reasons for not having a hearing aid (II/II)

- Family doctors opinion (GP)
- Have tried hearing aid and they do not work
- Bad design
- Have hearing loss in only one ear
- Have hearing loss only with low frequency sounds
- Hearing Aid Dispenser/Audiologists opinion
- Social / Family opinion such as child, spouse, friend
- Would be embarrassed to wear a hearing aid
- Do not admit I have a hearing loss in public
- Hearing problem requires surgery
- Have Sensor-neural hearing loss (nerve deafness)
- Another hearing aid owners opinion
- I have vision or dexterity problems
- Do not trust Hearing Aid Dispenser/Audiologist
- Have not had hearing tested yet
- Had surgery - hearing aids wont help
- Do not know where to get hearing aids

<table>
<thead>
<tr>
<th>Reason</th>
<th>Somewhat a reason</th>
<th>Not a reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>28%</td>
<td>8%</td>
<td>63%</td>
</tr>
<tr>
<td>21%</td>
<td>12%</td>
<td>66%</td>
</tr>
<tr>
<td>24%</td>
<td>9%</td>
<td>67%</td>
</tr>
<tr>
<td>25%</td>
<td>7%</td>
<td>68%</td>
</tr>
<tr>
<td>19%</td>
<td>12%</td>
<td>69%</td>
</tr>
<tr>
<td>23%</td>
<td>8%</td>
<td>69%</td>
</tr>
<tr>
<td>20%</td>
<td>10%</td>
<td>69%</td>
</tr>
<tr>
<td>23%</td>
<td>6%</td>
<td>71%</td>
</tr>
<tr>
<td>21%</td>
<td>7%</td>
<td>72%</td>
</tr>
<tr>
<td>21%</td>
<td>5%</td>
<td>74%</td>
</tr>
<tr>
<td>13%</td>
<td>13%</td>
<td>75%</td>
</tr>
<tr>
<td>16%</td>
<td>8%</td>
<td>76%</td>
</tr>
<tr>
<td>15%</td>
<td>7%</td>
<td>78%</td>
</tr>
<tr>
<td>16%</td>
<td>5%</td>
<td>79%</td>
</tr>
<tr>
<td>15%</td>
<td>4%</td>
<td>81%</td>
</tr>
<tr>
<td>11%</td>
<td>7%</td>
<td>82%</td>
</tr>
<tr>
<td>5%</td>
<td>2%</td>
<td>93%</td>
</tr>
</tbody>
</table>

Base: non owners Top 50% HL: n=232
Top 10 reasons for HA owners NOT using them

- They do not work well in noisy situations: 49% Reason, 35% Somewhat a reason, 15% Not a reason
- Hear well enough in most situations: 61% Reason, 18% Somewhat a reason, 21% Not a reason
- They do not restore your hearing to normal: 51% Reason, 27% Somewhat a reason, 22% Not a reason
- Hearing loss not severe enough: 52% Reason, 25% Somewhat a reason, 22% Not a reason
- Uncomfortable: 44% Reason, 12% Somewhat a reason, 44% Not a reason
- Have tried hearing aid and they do not work: 50% Reason, 43% Somewhat a reason, 50% Not a reason
- Have hearing loss in only one ear: 62% Reason, 31% Somewhat a reason, 62% Not a reason
- Have tinnitus (ringing in ears): 65% Reason, 29% Somewhat a reason, 65% Not a reason
- Have hearing loss only with high pitch sounds: 69% Reason, 23% Somewhat a reason, 69% Not a reason
- Bad design: 71% Reason, 23% Somewhat a reason, 71% Not a reason

Owners who don't use, n=19 (very low sample!)
You mentioned "uncomfortable" as a reason why you don't use your hearing aid(s). Please describe in detail why you consider your hearing aids uncomfortable.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>foreign object in the ear, it pinches, it hurts, too big</td>
<td>28%</td>
</tr>
<tr>
<td>uncomfortable noises, feedback, etc.</td>
<td>10%</td>
</tr>
<tr>
<td>others say it is uncomfortable</td>
<td>7%</td>
</tr>
<tr>
<td>taking it on and off, adjusting</td>
<td>6%</td>
</tr>
<tr>
<td>uncomfortable in general</td>
<td>6%</td>
</tr>
<tr>
<td>uncomfortable with glasses</td>
<td>5%</td>
</tr>
<tr>
<td>fall out, afraid of losing it</td>
<td>5%</td>
</tr>
<tr>
<td>changing batteries</td>
<td>4%</td>
</tr>
<tr>
<td>it is itching, sweat</td>
<td>4%</td>
</tr>
<tr>
<td>maintenance, cleaning</td>
<td>3%</td>
</tr>
<tr>
<td>not suited for certain activities (sports, swimming...)</td>
<td>2%</td>
</tr>
<tr>
<td>cerumen, dirt, infection</td>
<td>1%</td>
</tr>
<tr>
<td>other</td>
<td>18%</td>
</tr>
</tbody>
</table>

Base: n=309
Social rejection because of hearing loss compared to the acceptance of hearing aids
89% of hearing aid owners think people rarely or never make fun of or reject them because of their hearing aids. It is more likely somebody makes fun or rejects a hearing impaired without hearing aid.

**Hearing aid owners:**
How often do you feel you are made fun of or rejected because you are wearing a hearing aid?

- Never: 13%
- Rarely: 7%
- Occasionally: 3%
- Regularly: 76%

**Hearing impaired non-owners:**
How often do you feel you are made fun of or rejected because your hearing loss?

- Never: 45%
- Rarely: 34%
- Occasionally: 19%
- Regularly: 1%

Base: N=502
Base: Top 50% hearing loss, no hearing aid N=232
Buying intentions and most important triggers to buy
8% of non-owners intend to get a hearing aid within the next year. Re-buying intention is higher than first-buying intention.

**Buying intention hearing impaired in %**

<table>
<thead>
<tr>
<th></th>
<th>Within the next 6 months</th>
<th>In about a year</th>
<th>In about 2 years</th>
<th>In about 3 years</th>
<th>Not within 7 years</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Owner</strong></td>
<td>3%</td>
<td>5%</td>
<td>9%</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Non-owner</strong></td>
<td>3%</td>
<td>5%</td>
<td>3%</td>
<td>2%</td>
<td>9%</td>
</tr>
</tbody>
</table>

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The most important influencing factors are worsening hearing loss, doctors and significant others (+price, insurance coverage for the non owners)

Non-owner: Think about the option to obtain / purchase a hearing aid. What do you think would influence you to obtain / purchase a hearing aid?

Owner: Thinking back to when you obtained your first hearing aid(s), what influenced you to obtain /purchase the hearing aid(s)?

- Hearing loss got worse: 67% Non-Owner (n=805), 60% Owner (n=502)
- ENT/Ear Doctor: 54% Non-Owner, 52% Owner
- Price of hearing aid: 34% Non-Owner, 31% Owner
- Spouse: 25% Non-Owner, 24% Owner
- GP/Family doctor: 34% Non-Owner, 31% Owner
- Another hearing aid owner (word of mouth): 24% Non-Owner, 20% Owner
- Audicen: 18% Non-Owner, 16% Owner
- Free due to coverage by Insurance / Received hearing aid...: 11% Non-Owner, 15% Owner
- Relative, friend: 15% Non-Owner, 14% Owner
- Safety concerns: 14% Non-Owner, 13% Owner
- Co-worker or boss: 11% Non-Owner, 10% Owner
- Price of hearing aid: 11% Non-Owner, 7% Owner
- Hearing loss got worse: 4% Non-Owner, 4% Owner
- Hearing loss article or literature: 3% Non-Owner, 4% Owner
- Financial Situation improved: 2% Non-Owner, 3% Owner
- GP/Family doctor: 1% Non-Owner, 1% Owner
- Information/advice about hearing loss from consumer...: 1% Non-Owner, 1% Owner
- Co-worker or boss: 1% Non-Owner, 1% Owner
- Direct mail piece: 1% Non-Owner, 1% Owner
- TV advertisement: 1% Non-Owner, 1% Owner
- Magazine advertisement: 1% Non-Owner, 1% Owner
- Entertainment / TV / Radio: 1% Non-Owner, 1% Owner
- Internet: Websites of hearing aid clinics: 1% Non-Owner, 1% Owner
- Internet: Websites of hearing aids manufacturers: 1% Non-Owner, 1% Owner
- Internet: Other websites, google...: 1% Non-Owner, 1% Owner
- Newspaper advertisement: 1% Non-Owner, 1% Owner
- Telemarketing phone call: 1% Non-Owner, 1% Owner
- Other: 1% Non-Owner, 1% Owner
The most important trigger to buy a hearing aid is the hearing loss getting worse, followed by the ENT, audicien and spouse.

What made you finally decide to get your actual hearing aid(s)?

- Hearing loss got worse: 36%
- ENT/ Ear Doctor: 26%
- Audicien: 12%
- Spouse: 11%
- Friend / relative: 3%
- Price of hearing aid: 3%
- Another hearing aid owner (word of mouth): 2%
- Internet: Websites of hearing aids manufacturers: 1%
- Child: 1%
- GP /Family doctor: 1%
- Free due to coverage by Insurance / Received hearing aid free of charge: 1%
Sample size and random sample error: Rules of thumb

READ: At a sample size of n=500 and a value of 15% we would expect the real value in an interval +/-3.1 around 15% - which means between 11.9% and 18.1% (Conservative assumption: 95% confidence level)

<table>
<thead>
<tr>
<th>Sample size</th>
<th>Random sample error</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Real value is within interval:</td>
</tr>
<tr>
<td></td>
<td>Level of proportion: 50%/50%</td>
</tr>
<tr>
<td>50</td>
<td>+/- 13.9</td>
</tr>
<tr>
<td>100</td>
<td>+/- 9.8</td>
</tr>
<tr>
<td>250</td>
<td>+/- 6.2</td>
</tr>
<tr>
<td>500</td>
<td>+/- 4.4</td>
</tr>
<tr>
<td>1000</td>
<td>+/- 3.1</td>
</tr>
<tr>
<td>5'000</td>
<td>+/- 1.4</td>
</tr>
<tr>
<td>10’000</td>
<td>+/- 1.0</td>
</tr>
</tbody>
</table>
Demographics (1) Hearing instrument adoption rates and populations

<table>
<thead>
<tr>
<th>Gender</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>48.5%</td>
<td>51.7%</td>
<td>51.2%</td>
<td>49%</td>
<td>58%</td>
<td>51%</td>
</tr>
<tr>
<td>Female</td>
<td>51.5%</td>
<td>42.3%</td>
<td>48.8%</td>
<td>51%</td>
<td>42%</td>
<td>49%</td>
</tr>
<tr>
<td>Age recoded</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 - 14</td>
<td>18.5%</td>
<td>3.8%</td>
<td>4.6%</td>
<td>19%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>15 - 24</td>
<td>12.3%</td>
<td>4.1%</td>
<td>2.0%</td>
<td>12%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>25 - 34</td>
<td>13.9%</td>
<td>6.5%</td>
<td>1.4%</td>
<td>14%</td>
<td>7%</td>
<td>1%</td>
</tr>
<tr>
<td>35 - 44</td>
<td>13.7%</td>
<td>10.7%</td>
<td>2.6%</td>
<td>14%</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td>45 - 54</td>
<td>14.1%</td>
<td>18.7%</td>
<td>4.3%</td>
<td>14%</td>
<td>19%</td>
<td>4%</td>
</tr>
<tr>
<td>55 - 64</td>
<td>12.5%</td>
<td>17.3%</td>
<td>11.3%</td>
<td>12%</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td>65 - 74</td>
<td>8.5%</td>
<td>15.8%</td>
<td>23.6%</td>
<td>9%</td>
<td>16%</td>
<td>24%</td>
</tr>
<tr>
<td>74+</td>
<td>6.6%</td>
<td>23.0%</td>
<td>50.2%</td>
<td>7%</td>
<td>23%</td>
<td>50%</td>
</tr>
</tbody>
</table>

| Type of household |       |                    |                                                     |                |                                |             |
|-------------------|-------|--------------------|-----------------------------------------------------|                |                                |             |
| Single household  | 8.2%  | 13.6%              | 20.7%                                               | 8%             | 14%                            | 21%         |
| Couple, no kids   | 24.2% | 30.4%              | 42.9%                                               | 24%            | 30%                            | 43%         |
| Couple with kid(s)| 54.5% | 40.7%              | 20.8%                                               | 54%            | 41%                            | 21%         |
| Single mom/dad with kid(s) | 6.2% | 4.3% | 3.0% | 6% | 4% | 3% |
| Retirement home, hospital etc. | 0.5% | 3.6% | 5.3% | 1% | 4% | 5% |
| Other             | 6.3%  | 7.4%               | 7.4%                                                | 6%             | 7%                             | 7%          |

Profiles: Categories add to 100%*

* Small sample sizes in some categories
Demographics (2) Hearing instrument adoption rates and populations

<table>
<thead>
<tr>
<th>Status</th>
<th>Count</th>
<th>Hearing difficulty</th>
<th>Hearing aid adoption rate % (Base=hearing impaired)</th>
<th>No hearing loss</th>
<th>Hearing loss but no hearing aid</th>
<th>Hearing aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>The head of the household (alone or together with someone)</td>
<td>42.1%</td>
<td>63.4%</td>
<td>64.5%</td>
<td>42%</td>
<td>63%</td>
<td>64%</td>
</tr>
<tr>
<td>The spouse of the head of the household</td>
<td>22.0%</td>
<td>24.5%</td>
<td>25.6%</td>
<td>22%</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>Daughter/son of head of household</td>
<td>33.1%</td>
<td>9.5%</td>
<td>6.0%</td>
<td>33%</td>
<td>9%</td>
<td>6%</td>
</tr>
<tr>
<td>Other Person</td>
<td>2.9%</td>
<td>2.7%</td>
<td>3.9%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Employment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full time employed</td>
<td>44.9%</td>
<td>34.8%</td>
<td>7.1%</td>
<td>45%</td>
<td>35%</td>
<td>7%</td>
</tr>
<tr>
<td>Part time employed</td>
<td>10.8%</td>
<td>8.1%</td>
<td>4.1%</td>
<td>11%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>Unemployed / not working</td>
<td>7.3%</td>
<td>5.5%</td>
<td>5.6%</td>
<td>7%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Retired under a disability pension scheme (fully or partly)</td>
<td>2.9%</td>
<td>3.9%</td>
<td>2.8%</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Early retired under an early retirement benefit scheme</td>
<td>2.9%</td>
<td>4.2%</td>
<td>4.5%</td>
<td>3%</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Retired (at the official retirement age)</td>
<td>19.6%</td>
<td>40.1%</td>
<td>74.1%</td>
<td>20%</td>
<td>40%</td>
<td>74%</td>
</tr>
<tr>
<td>Student / pupil / in training</td>
<td>11.6%</td>
<td>3.5%</td>
<td>1.7%</td>
<td>12%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lager onderwijs</td>
<td>6.5%</td>
<td>11.6%</td>
<td>20.5%</td>
<td>6%</td>
<td>12%</td>
<td>20%</td>
</tr>
<tr>
<td>Secundair onderwijs Algemeen</td>
<td>14.3%</td>
<td>14.5%</td>
<td>15.9%</td>
<td>14%</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Secundair onderwijs Technisch</td>
<td>14.5%</td>
<td>16.1%</td>
<td>14.8%</td>
<td>15%</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Secundair onderwijs Beroeps</td>
<td>10.2%</td>
<td>10.2%</td>
<td>11.7%</td>
<td>10%</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Hoger onderwijs bachelor</td>
<td>31.3%</td>
<td>27.6%</td>
<td>20.7%</td>
<td>31%</td>
<td>28%</td>
<td>21%</td>
</tr>
<tr>
<td>Hoger onderwijs master</td>
<td>19.8%</td>
<td>16.7%</td>
<td>12.9%</td>
<td>20%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>andere</td>
<td>3.3%</td>
<td>3.2%</td>
<td>3.6%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Profiles: Categories add to 100%*

* Small sample sizes in some categories