

# “Baby Boomers” spur growth in potential market, but penetration rate declines

By Sergei Kochkin

The key finding in MarkeTrak V is that 1 million people ages 45-54 have come to recognize, as a result of publicity about President Clinton's hearing loss, that they too have a hearing loss. It will now be up to the hearing instrument industry to find ways to convert this newly emergent “baby boomer” hearing loss recognition into sales.

The hearing-impaired population has grown to 27.2 million, not including residents of nursing or retirement homes. Since 1994, more than 1 million additional people in President Clinton's age bracket (ages 45-54) have come forward and identified themselves as having a hearing loss. That's an astounding growth rate of 23%.

Other high-growth segments were: persons with annual income greater than \$60,000 (35% growth) and individuals with some college (30%). Unfortunately, sales to the baby boomer segment have grown by only 5% since 1994. Thus, overall market penetration continues to drop, reaching an all-time low of 20.4%.

The hearing aid market has gained back the very elderly consumers, who dropped out of the market during the period of adversity with the Food and Drug Administration in 1993-1994.

Despite efforts to reach primary-care physicians, the percentage of patients reporting that they received a hearing screening during their last physical exam remained unchanged from MarkeTrak IV. However, the number of first-time users who indicated their family doctor recommended hearing instruments is increasing.

Satisfaction rates with hearing instruments in general and with newer instruments ((4 years) in particular have remained unchanged since 1994. Despite the increased use of programmable and digital signal processing (DSP) technology, short-term satisfaction (<1 year) has declined. Satisfaction with programmable technology is 16% higher than with non-programmable hearing aids. However, historically too few programmables have been sold to have a major impact on overall customer satisfaction with hearing aids.

Some other key findings in MarkeTrak V include the following:

- The portion of hearing instruments in the drawer has decreased (improved) to 16.2%.
- The new user rate (39%) has rebounded back to 1991 levels.

- The average age of new users is showing a slight downward trend since 1991.
- The household income of new users is nearly \$10,000 higher than in the last survey.
- The binaural rate continues to grow. Among patients with bilateral loss who own hearing aids, 78.6% were fitted binaurally.
- Third-party payments increased to 27.5%.

## INTRODUCTION

In 1984, the Hearing Industries Association (HIA) commissioned the first major study of the hearing-impaired market.<sup>1</sup> Since then, Knowles Electronics has conducted five tracking surveys of the U.S. hearing-impaired populations between the years 1989 and 1997. All of the MarkeTrak findings have been presented in the *Hearing Journal*.

This article is the first in a series of publications that will cover significant trends and indices in the hearing instrument market. Future articles will revisit customer satisfaction in detail and will publish new customer-satisfaction norms. This will be followed by a detailed analysis of hearing aids in the drawer.

Finally, we have designed an experimental version of the Abbreviated Profile of Hearing Aid Benefit (APHAB), which we will be comparing and contrasting with the current version.

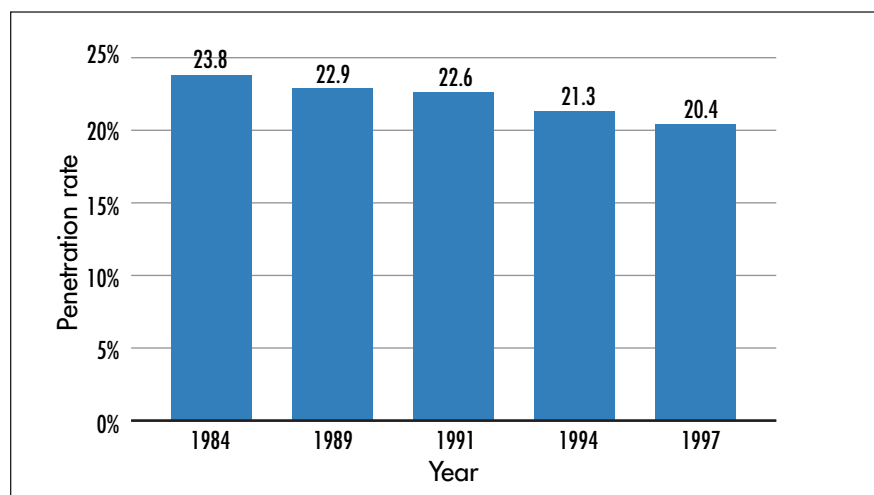
We did not survey the hearing-impaired non-owner in MarkeTrak V for three reasons: (1) HIA is conducting a large-scale quality-of-life study among the MarkeTrak V panel. (2) Significant data in the Pygmalion Model<sup>2</sup> remain to be published on this segment. (3) A great deal of information on the non-user has been published in the MarkeTrak III<sup>3</sup> and MarkeTrak IV<sup>4</sup> surveys. The HIA Quality of Life and Knowles Pygmalion databases represent very rich sources of information on the non-user. As these databases are mined, relevant findings will be published.

## SURVEY METHODOLOGY

In November 1997, a short screening survey was mailed to 80,000 members of the National Family Opinion (NFO) panel. The NFO panel consists of households that are balanced to the latest U.S. census information with respect to market size, age of household, size of household, and income within each of the nine census regions, as well as by family versus non-family households, state (with the

**Table 1. General Indices - Hearing impaired market**

	1984	1989	1991	1994	1997
<b>Hearing-impaired Population</b>	(n=53,942)	(n=27,103)	(n=54,871)	(n=49,013)	(n=52,180)
U.S. Households (Millions)	85.5	92.8	94.3	97.1	100.4
Hearing difficulty per 1000 households		266	274	269	271
Number of hearing impaired (millions)	16.4	24.7	25.8	26.1	27.2
<b>Hearing Instrument Population</b>	(n=10,000+)	(n=7,340)	(n=13,487)	(n=12,697)	(n=13,492)
Hearing Instrument Penetration	23.8%	22.9%	22.6%	21.3%	20.4%
Hearing instrument owners (Millions)	3.9	5.7	5.8	5.6	5.6
Hearing impaired non-owners (Million)	12.5	19.0	20.0	20.6	21.7
Hearing instruments owned (Millions)	4.8	7.8	8.8	8.5	8.9
Hearing instruments in use (Millions)	4.2	6.7	7.7	6.9	7.4
<b>Binaural Population</b>		(n=1,632)	(n=2,323)	(n=2,327)	(n=2,680)
All users	21.8%	37.3%	50.5%	51.9%	59.9%
Bilateral loss subjects			66.1%	66.9%	74.3%
<b>Purchases this period</b>					
All users	24.5%	47.1%	60.6%	65.3%	65.2%
First time users		46.2%	53.1%	54.0%	55.0%
Bilateral loss subjects			70.0%	79.4%	78.6%
<b>Physicians</b>					
% Population receiving hearing screening during last physical exam		(n=11,643)	(n=23,915)	(n=21,596)	(n=23,636)
Total Population		16.3%	18.0%	16.6%	16.6%
Screening by age group					
20-44		14.9%	14.8%	14.2%	14.4%
44-64		14.3%	15.9%	15.0%	14.6%
65-74		20.1%	20.0%	19.1%	17.6%
75+		21.8%	24.2%	20.7%	21.6%



**Figure 1.** Hearing aid market penetration (1984-1997)

exception of Hawaii and Alaska), and the nation's top 25 metropolitan statistical areas.

The screening survey covered only three issues: (1) physician screening for hearing loss, (2) whether the household had a per-

son "with a hearing difficulty in one or both ears without the use of a hearing aid," and (3) whether the household had a person who owned a hearing instrument. This short survey helped identify nearly 15,000

hearing-impaired individuals and also provided detailed demographics on those individuals and their households. The response rate to the screening survey was 65%.

In December 1997, an extensive survey was sent to 3300 hearing instrument owners, and the response rate was 83%. The data from this survey were processed in February 1998.

The data presented in this article refer only to households as defined by the U.S. Bureau of Census, that is, people living in a single-family home, duplex, apartment, condominium, mobile home, etc. People living in institutions have not been surveyed; these would include residents of nursing homes, retirement homes, mental hospitals, prisons, college dormitories, and the military.

## RESULTS AND DISCUSSION

The data presented in this study compare the MarkeTrak survey results over the last 9 years with selected data from the 1984

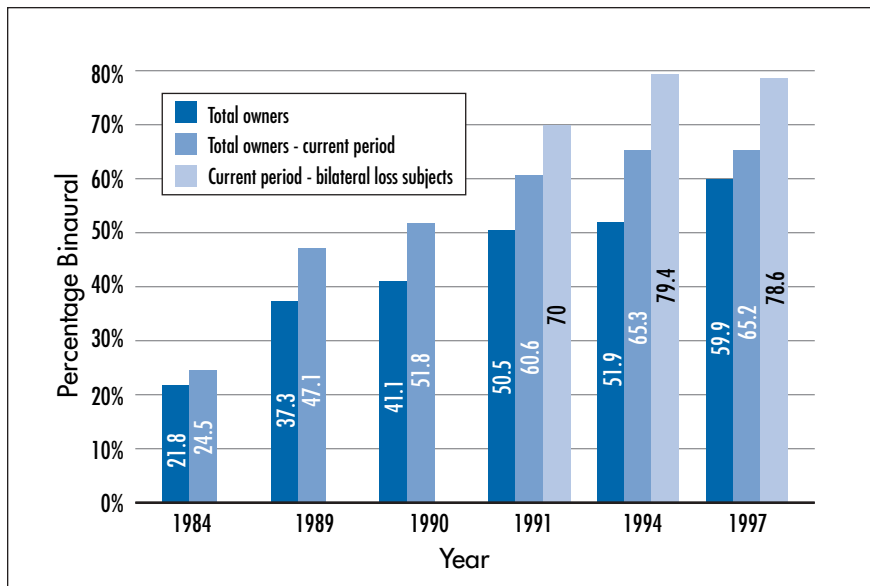


Figure 2. Binaural hearing instrument owner population trend.

HIA database of the hearing-impaired market. Tables 1-5 show general trends and indices of the hearing-impaired and hearing instrument owner populations. This article will discuss each table in the order of appearance, with references to relevant figures. Note: Sample sizes are denoted in each table by: ( $n =$ ).

### Hearing-impaired population (Table 1)

As measured by MarkeTrak, the incidence of hearing loss per 1000 households was relatively stable between 1989 and 1997, varying between 266 and 274 and settling at 271 in 1997. This equates to 27.2 million people reporting a hearing difficulty or 10% of the U.S. population. Thus, the available market has grown by 1.1 million hearing-impaired since the 1994 MarkeTrak IV survey.<sup>5</sup>

Table 2. General Indices - Hearing Instrument Market

	1984	1989	1991	1994	1997
<b>Price of hearing aids (retail)</b>	( $n=428$ )	( $n=417$ )	( $n=493$ )	( $n=557$ )	( $n=498$ )
Third Party Payments (%)	22.2%	21.1%	16.2%	23.0%	27.5%
Average price to consumer	\$501	\$609	\$667	\$710	\$877
<b>By type of hearing aid</b>					
BTE		\$543	\$557	\$744	\$827
ITC		\$742	\$795	\$761	\$986
ITE		\$605	\$669	\$659	\$737
<b>Hearing Instrument Distribution</b>	( $n=428$ )	( $n=356$ )	( $n=493$ )	( $n=653$ )	( $n=537$ )
<b>(Purchases this period)</b>					
<b>By perceived profession</b>					
Audiologist	22.0%	48.4%	46.1%	49.3%	53.6%
Hearing instrument specialist	66.4%	46.6%	49.8%	44.7%	43.4%
Medical doctor	4.8%	1.5%	1.2%	1.9%	1.3%
Other	6.9%	3.6%	2.9%	4.1%	1.7%
<b>By Source of distribution</b>					
Hearing aid store/dispenser	48.7%	30.0%	35.5%	31.1%	30.5%
Audiologist's office	21.3%	35.8%	36.5%	40.9%	41.3%
Clinic		5.2%	1.4%	1.9%	2.0%
Hospital		2.1%	2.2%	2.2%	2.6%
Ear doctor's office	5.0%	14.5%	5.5%	7.6%	7.1%
Family doctor's office	0.3%	1.3%	0.2%	0.6%	4.0%
Veterans administration		1.8%	2.4%	3.4%	4.5%
Mail order	2.1%	3.0%	0.8%	2.5%	0.9%
Department store	2.4%	3.2%	4.7%	2.2%	2.4%
Home	6.3%	8.4%	7.3%	4.4%	3.7%
Military installation		2.5%	1.4%	1.4%	1.1%
Other	15.0%	1.7%	2.0%	1.9%	3.4%

**Table 3. Satisfaction with Hearing Instruments**

	1984	1989	1991	1994	1997
<b>Satisfaction with Hearing Instruments</b>		(n=1,632)	(n=2,323)	(n=2327)	(n=2,720)
<b>Total owner population</b>					
% Satisfied		58.5%	57.8%	53.4%	54.5%
% Neutral		22.6%	21.7%	26.6%	26.1%
% Dissatisfied		19.0%	20.3%	20.0%	19.4%
% hearing instruments in drawer (not used)	13.5%		12.0%	17.9%	16.2%
<b>New hearing instruments (&lt; 1 year)</b>					
% Satisfied			66.3%	70.7%	63.1%
% Neutral			21.8%	22.7%	26.7%
% Dissatisfied			11.9%	6.6%	10.2%
% hearing instruments in drawer (not used)			3.0%	3.5%	4.6%
<b>New hearing instruments (&lt; 4 years)</b>					
% Satisfied			60.7%	58.7%	59.3%
% Neutral			21.6%	25.0%	26.3%
% Dissatisfied			17.8%	17.3%	14.9%
% hearing instruments in drawer (not used)			7.7%	11.1%	8.8%

### Hearing instrument owner population (Table 1)

As shown in Figure 1, hearing instrument penetration has been declining steadily since 1984. In that year, penetration was 23.8%; currently it is 20.4%. From 1984 to 1997, the number of hearing instrument owners remained unchanged at 5.6 million, while hearing-impaired non-users increased by 1.1 million to 21.7 million people.

Figure 2 shows the remarkable growth rate for binaural purchases. Since our last survey, the binaural population increased from 51.9% to 59.9% of all hearing aid users and from 66.9% to 74.3% of users with bilateral loss. The binaural purchase rate has leveled off at 65.2% for all users and 78.6% for bilateral loss consumers.

Figure 3 documents the age distribution of hearing instruments in use as measured in the three previous MarkeTraks (Note: A user is defined as an individual who reports wearing and using his hearing instrument(s). Usage is accepted even if it is only occasional, e.g., less than a half hour per day.)

The percentage of hearing instruments in use that are 2 years old or less increased to 46.6% of the market, which is considerably better than MarkeTrak IV found (34.1%). In MarkeTrak IV, we hypothesized that a portion of the replacement market had

stayed out of the market due to negative publicity surrounding the "truth in advertising" difficulties with the FDA in 1993 and 1994. It would appear from this survey that consumers who had previously stayed out of the market when it was time to replace their hearing instrument have returned.

### Physician screening for hearing loss (Table 1)

We specifically ask individuals who received a physical exam within the last 6 months to indicate if their physician screened for hearing loss during the exam. The historical trends are shown in Figure 4.

Physician screening has remained the same (16.6%) since the last survey for the total population as well as by age group. This is puzzling given that one manufacturer has distributed more than 30,000 screening kits to primary-care physicians. It is too soon to gauge the impact of the Better Hearing Institute (BHI) work in the physician market. BHI has published and begun distributing a *Physician's Guide for Identifying Hearing Loss*. In addition, the institute was able to secure center stage at the latest conference of the American Academy of Family Physicians. Figure 4 clearly shows the modest gains in this area which had been made by HIA when it advertised and conducted pub-

lic relations to raise physician awareness of the importance of hearing screening.

### Price of hearing instruments (Table 2)

Referring now to Table 2, third-party payment (e.g., Medicare, union, insurance, HMO, etc.) increased to 27.5% of hearing instruments sold in 1997. As a reminder to the reader, the dramatic decline in third-party payment in 1991 was probably due to the scrutiny of post-retirement benefit accounting practices by the Financial Accounting Standards Board; corporations were warned that they must accrue the cost of post-retirement healthcare benefits during the working life of the employee. In 1991, this ruling created great pressures on corporations to reduce post-retirement healthcare benefits.

Since the last survey (1994), the average price of a hearing instrument as paid by the consumer (including free and third-party discount) increased 23.5% to \$877. In comparison, the retail price rate increase in 1994 (over 1991) was 6.4%. By style of hearing instrument the price increases were as follows: BTE (11.1%), ITC (29.6%), ITE (11.8%). The higher rate for ITCs is due to the inclusion of CICs in this category.



**Table 5. Hearing Instrument Penetration by Selected Demography (continued)**

	Hearing instrument penetration (% own hearing instruments)					% of total (1997)		1997 Population Size (000)		
	1984	1989	1991	1994	1997	Hearing Aid Owners	Hearing-impaired Non-owners	Hearing aid Owners	Hearing-impaired Non-owners	Total Hearing Impaired
<b>By Employment Category</b>										
Full time employment	13.4%	10.6%	11.3%	10.5%	9.6%	21.0%	51.3%	1,176	11,128	12,304
Part time employment	21.2%	16.8%	18.8%	18.4%	17.9%	8.2%	9.7%	461	2,111	2,573
Unemployed	20.2%	17.0%	15.2%	15.1%	14.2%	7.5%	11.6%	418	2,526	2,944
Retired	36.3%	36.2%	37.2%	37.4%	37.4%	63.3%	27.4%	3,545	5,935	9,480
<b>By Metro Size</b>										
Less than 50k	24.2%	22.9%	21.4%	19.6%	18.7%	22.8%	25.6%	1,276	5,560	6,836
50k-499k	22.3%	21.6%	22.2%	20.2%	19.5%	14.7%	15.7%	824	3,400	4,224
500k-1.99 mil.	25.2%	24.0%	22.3%	23.7%	21.0%	20.2%	19.6%	1,131	4,253	5,384
2 mil. and above	23.2%	24.8%	24.0%	22.1%	21.8%	42.3%	39.1%	2,369	8,487	10,856
<b>By Lifestyle</b>										
Roommates	18.5%	16.6%	18.9%	15.7%	11.2%	1.4%	2.9%	80	629	709
Singles - young	12.4%	16.4%	14.3%	11.6%	12.5%	1.4%	2.5%	77	538	615
- middle	13.5%	19.2%	20.9%	16.3%	15.7%	5.4%	7.5%	304	1,632	1,936
- older	41.2%	45.8%	45.7%	43.2%	44.2%	19.1%	6.2%	1,072	1,352	2,424
Couples - young	7.0%	19.0%	13.0%	11.6%	10.8%	2.8%	5.9%	155	1,278	1,433
- working older	23.6%	23.7%	25.7%	24.0%	21.7%	16.1%	14.9%	900	3,240	4,140
- retired	35.7%	36.6%	37.0%	36.0%	35.7%	33.3%	15.5%	1,867	3,366	5,233
Parents - young	10.3%	9.8%	7.5%	7.6%	6.9%	3.6%	12.6%	202	2,741	2,943
- middle	7.7%	13.1%	8.9%	7.7%	6.4%	3.2%	11.9%	177	2,591	2,768
- older	19.6%	19.6%	17.8%	15.7%	15.0%	13.7%	20.0%	766	4,333	5,100

### Distribution (Table 2)

There have been only minor changes in the distribution of hearing instrument fittings between 1994 and 1997. In 1997, 53.6% of fittings were performed by audiologists compared to 49.3% in 1994 (See Figure 5). In comparison, the share of sales by hearing instrument specialists declined slightly to 43.4% in 1997. Fittings by medical doctors and others (e.g., mail-order) remain trivial. However, this was before the advent of aggressive marketing campaigns for mail-order amplification devices.

It should be understood that the distribution data represent perceptions of the consumer, who may not always be able to differentiate an audiologist from a hearing instrument specialist. With respect to the source of distribution (see Figure 6), there are few notable changes or short-term trends. Fittings in family doctors' offices (4%) are the highest since we have been measuring fittings by distribution source. The more significant

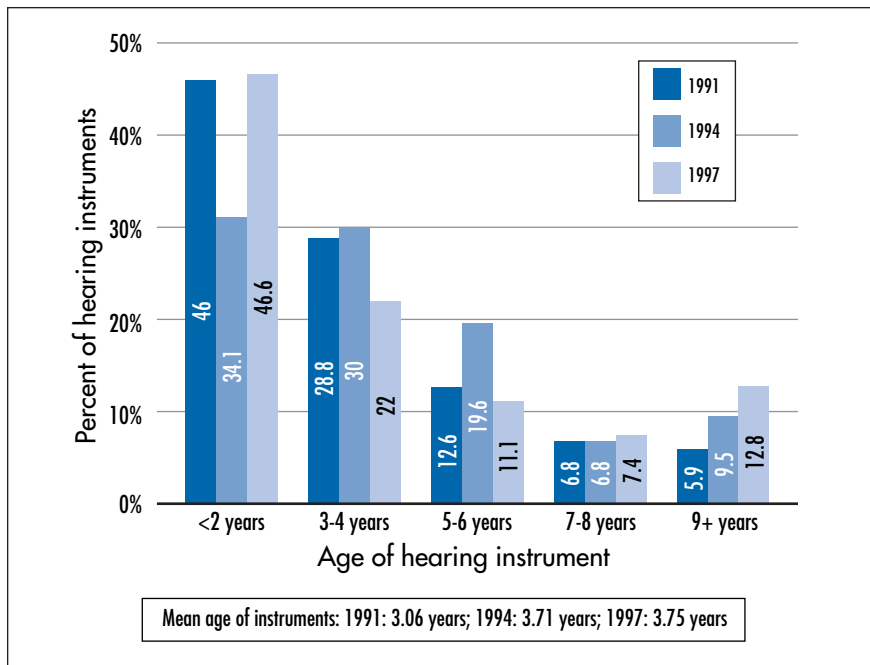


Figure 3. The age of hearing instruments (current users only).

Table 4. New Hearing Instrument Owners

	1989	1991	1994	1997
<b>Demographics</b>	(n=200)	(n=199)	(n=190)	(n=204)
First time owner % (current period)	53.4%	40.5%	29.0%	39.0%
Average age	66.0	68.4	67.8	66.3
Average household income (\$000)	\$30.5	\$35.3	\$30.8	\$40.1
<b>Factors Influencing New First Time Owners</b>				
Hearing loss got worse	72.2%	55.8%	64.4%	63.2%
Family members	52.2%	56.8%	49.5%	53.4%
Audiologist	25.7%	26.6%	27.1%	26.0%
Hearing aid specialist	15.9%	14.1%	20.7%	13.2%
Ear doctor	28.6%	19.1%	18.6%	10.8%
Hearing aid owner	na	na	13.8%	10.8%
Family doctor	17.2%	7.0%	8.5%	10.3%
Received free hearing aid			8.5%	6.9%
Price of hearing aid	na	na	4.8%	5.9%
Advertisement - magazine	4.0%	2.0%	0.5%	5.0%
Financial situation improved	na	na	2.7%	4.9%
Hearing loss literature	10.5%	2.0%	3.7%	2.9%
Boss or co-worker	3.2%	4.5%	2.7%	2.9%
Advertisement - newspaper	2.5%	4.0%	2.7%	2.0%
Direct mail	2.9%	2.5%	0.5%	2.0%
Advertisement - television	6.5%	4.5%	0.5%	1.5%
Celebrity	3.3%	0.5%	0.0%	0.0%
Advertising radio	na	na	8.5%	0.0%
Telemarketing phone call	0.7%	0.0%	1.6%	0.0%



trend is the steady increase in fittings through the Veterans Administration, as shown in Table 2. VA fittings increased from 1.8% of all sales in 1989 to 4.5% of sales in 1997.

### Satisfaction with hearing instruments (Table 3)

Table 3 and Figure 7 document overall satisfaction with hearing instruments for the years 1989-1997. Satisfaction with all hearing aids (regardless of age of the hearing instrument) was only slightly higher than in the 1994 survey (54.4%). In comparison, programmable product received a rating of 68%, which was 16% points higher than the non-programmable product (52%).

Referring to Figure 7, if we consider hearing instruments 4 years of age (the average effective life of a hearing instrument) or less, the overall customer satisfaction rate is statistically equivalent over the last three MarkeTrak surveys (1991, 1994, 1997), despite increases in the penetration of programmable product, which on average receives satisfaction ratings 10% points higher than non-programmable product (within the 4-year time frame). Satisfaction with new hearing instruments (e.g., less than 1 year old) declined to 63.1% in 1997 from 70.7% in 1994.

Hearing aids in the drawer improved (declined) to 16.2% in 1997 from a high of 17.9% in 1994. However, new hearing aids in the drawer would appear to be increasing. Currently 4.6% of hearing aids that are less than 1 year of age are not used.

The reader may wonder why, if programmable sales have been increasing in recent years, overall customer satisfaction is virtually unchanged for the whole market. In a previous publication<sup>6</sup>, we have shown that the average digitally programmable analog product achieves a customer satisfaction rating 13% higher than the average hearing aid (which also includes about 10% programmable). In MarkeTrak V, the average programmable achieved a customer satisfaction rating 16% higher than non-programmable product and for newer product (4 years old and less) the difference is about 10% points. In short, penetration of the hearing aid market by advanced technology is key to improving customer satisfaction.

However, the existing population of consumers using advanced programmable product is simply too small at this point to

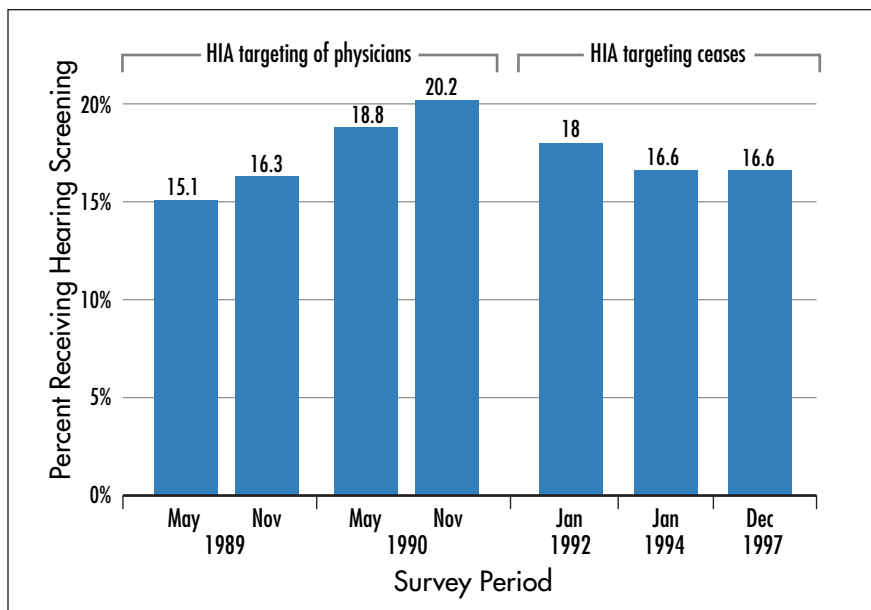


Figure 4. Percentage of U.S. population screened for hearing loss during a physical exam.

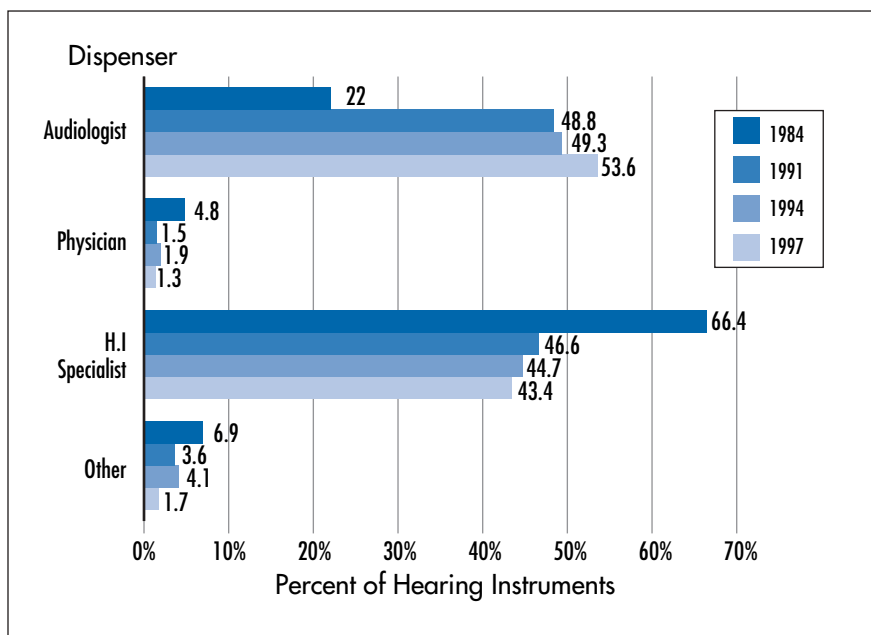


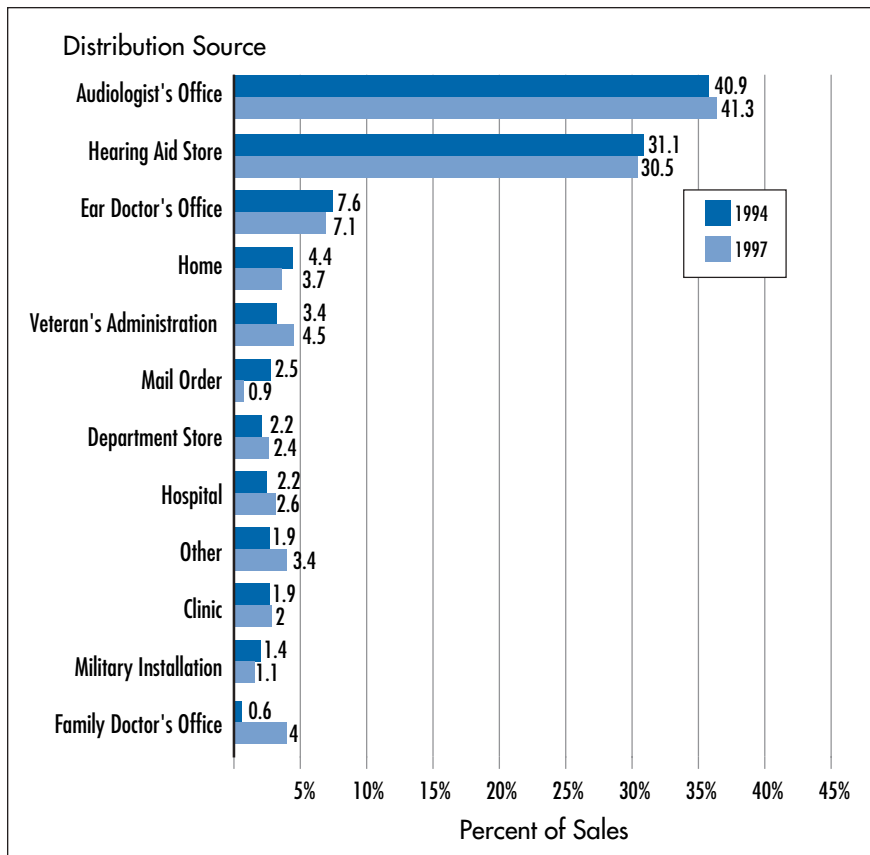
Figure 5. Hearing instrument fittings by perceived profession.

achieve significant gains in overall customer satisfaction. According to HIA statistics, over the last 4 years programmable product has garnered only 11% of domestic U.S. sales. Therefore, the opportunity for positive word-of-mouth advertising has not yet been realized. Until advanced programmable technology is the norm, it will be difficult to achieve the critical mass capable of catapulting the industry's customer satisfaction to new levels.

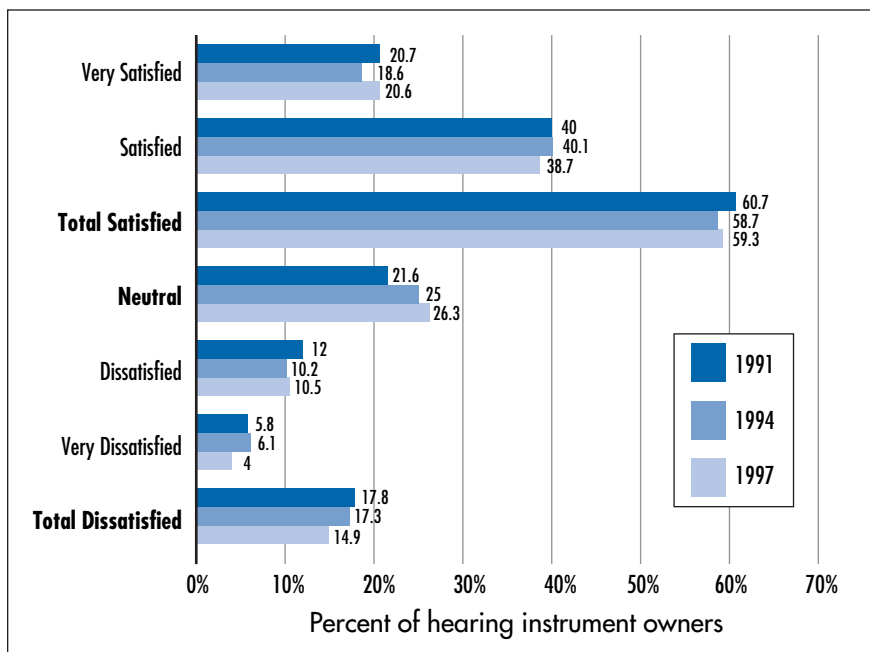
In MarkeTrak V, more than 60 measures of satisfaction (e.g., product, value, service)

were collected on current owners, as were benefit data. It is beyond the scope of this paper to present the detailed satisfaction/benefit data here; thus, the next article in this series will be dedicated to a comparison of the 1991, 1994, and 1997 satisfaction results for the U.S. market. In addition, nearly 400 commentaries were received from consumers who have their hearing aids in the drawer. These will serve as input into the third article in the MarkeTrak series. The fourth article will take a closer look at subjective benefit with hearing instruments.





**Figure 6.** Hearing instrument sales by source of distribution.



**Figure 7.** Overall satisfaction with hearing instruments which are 4 years old or less.

### New hearing instrument owners (Table 4)

As shown in Table 4, first-time owners increased in 1994 to 39% of sales from 29% of sales in 1991. By comparison, in 1989 they represented more than half of

sales. We are hypothesizing that 1989 was an unusually high year for new users and that they were probably stimulated by Eddie Albert hearing aid television commercials in 1988 and 1989.

The age of new users would appear to be declining over the last 6 years. The cur-

rent new user is 66.3 years of age with an annual household income of \$40,100, up from \$30,800 in 1994.

Factors influencing new, first-time owners to purchase a hearing instrument were the perception that their hearing loss was getting worse (63.2%), family members (53.4%), audiologists (26%), hearing instrument specialists (13.2%), ear doctors (10.8%), and current hearing aid owners (10.8%). Notable are the declines in the ENT's influence (10.8% in 1997 versus 18.6% in 1991 and 28.6% in 1989). It would appear that family practice physician recommendations are increasing steadily (now 10.3%), but they are still below their high in 1989 (17.2%) when HIA was advertising to physicians. With respect to media we see significant gains in the influence of magazines (5% versus 0.5%) and a drop in radio advertising mentions (0% versus 8.5% in 1994).

### Hearing-impaired population demography (Table 5)

Table 5 presents detailed demography for the year 1997 and compares penetration rates over the years 1984 to 1997. When we compare penetration by age (see Figure 8), it is evident that the consumer 75 and over who had previously stayed out of the market in 1992-1994 has returned. When we compare population figures by age segment to MarkeTrak IV<sup>5</sup>, the largest growth took place in the following segments: age 45-54 (23% growth), income >\$60,000 (35%), some college education (30%), employed full-time (7%), metro size >2 million (17%), young parents (21%).

With respect to the age segment 45-54, MarkeTrak III (1991) estimated there were 4 million hearing-impaired people in this age group, while MarkeTrak IV (1994) estimated there were 4.5 million "baby boomers." As seen in Figure 9, 3 years later that age segment had expanded to 5.5 million for a gain of 1 million potential new customers, while our traditional customers (ages 65-74) have been dropping.

Where did the baby boomers come from? It is possible that the remarkable growth in the affluent and college-educated baby boomer hearing-impaired segments is due, at least in part, to the tremendous media exposure given to President Clinton's hearing loss. The positive coverage may have led baby boomers to admit to their hearing loss, perhaps 5-10 years ear-

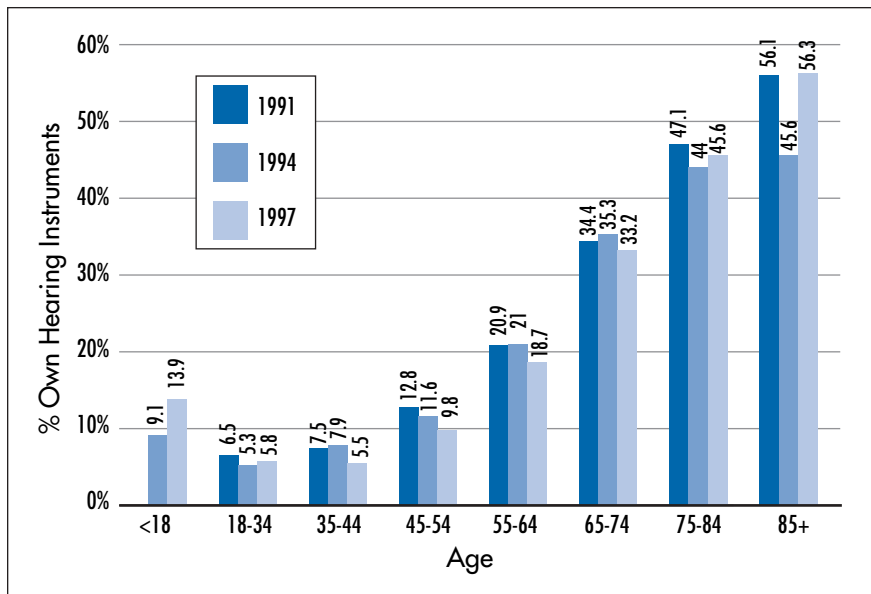


Figure 8. Market penetration by age group.

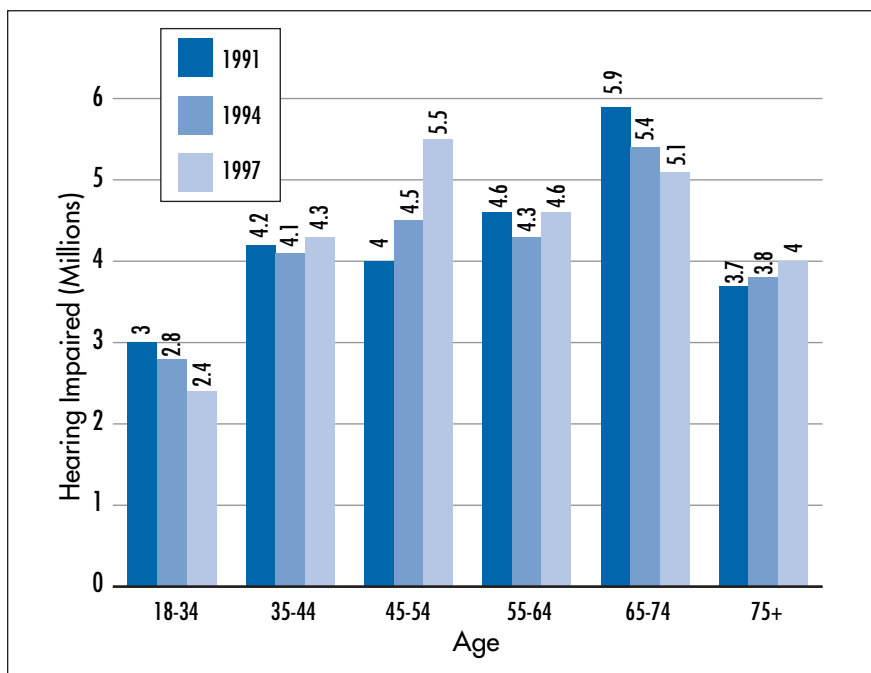


Figure 9. Growth in adult hearing-impaired population by age group (1991-1997).

lier than they would have otherwise.

However, hearing aid penetration among this group has dropped, since there has not been a corresponding growth rate for hearing instrument sales in this age segment; in 1997, the sales increase was only 5%. Thus, 1 million people ages 45-54, perhaps ahead of their time, have come to recognize, because of the publicity about President Clinton's hearing loss, that they too have a hearing loss.

Some might argue that the age wave was coming anyway when we compare

1991 and 1994 population figures. However, this is unlikely since we would have seen significant drops in the 35-44 age group as they matured. It will be a challenge to turn this potential new customer base into actual users of our industry's products and services. One suspects that the techniques we have previously used to convert the parents of baby boomers will have to change radically if we are to catch this "age wave" on the rise. (HJ)

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