

40 70

*“The 40-70 Rule”  
Executive Summary  
U.S. Survey Results*



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*I*ndependent research by Home Instead Senior Care® of 1,000 U.S. Baby Boomers provided new insights into the dynamics of the conversations which do—and do not—take place between Boomers and their aging parents. This first-of-its-kind study revealed obstacles to communication and solutions that would substantially improve communication and the quality of life for both generations.

This telephone study of Boomers aged 45 to 65 years found that Boomers have the most difficulty talking with their parents about independence issues such as leaving home—and that their parents' desire to remain independent makes it challenging to address such sensitive issues as driving privileges. Nearly one-third of Boomers said their biggest communication obstacle is continuation of the “parent-child roles” that emerged during their childhood. An analysis of survey results suggests that this communications hurdle can best be overcome if “the conversation” begins when the child reaches age 40 years or the parent reaches age 70 years, whichever comes first. This is the new “40-70 Rule.”

The importance of this quality communication between Baby Boomers and their aging parents becomes clear since it directly impacts the seniors' ability to access resources as assistance becomes necessary. The research also found that communications between adult child and parent are influenced by many factors, including the gender of the child and parent, the topic of conversation, and the distance the child lives from the parent.

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## KEY FINDINGS

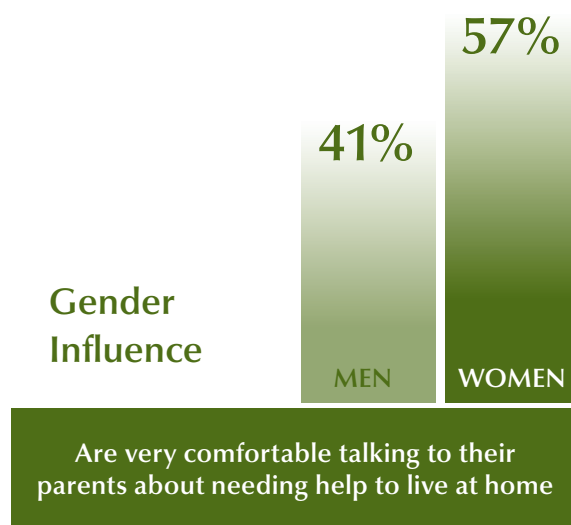
### Quantity and Quality of Communication

- Boomers communicate frequently with senior parents by phone and face-to-face: 35% communicate daily with their parents and 26% communicate every couple days.
- A majority of Boomers communicate with their parents most frequently by telephone.
- Most often Boomers are talking to their parents about topics that could be classified as “everyday things” including family, hobbies, and work.
- Many Boomers would like to know more about their parents’ personal situations so they can help them if necessary; for example, half would like to know more about their parents’ cognitive abilities.
- Children see themselves—not their parents—as the “conversation starters.” For instance, fewer than half of Boomers say their parents are very likely to voluntarily communicate that they need help around the house with chores.



### Communication Influencers

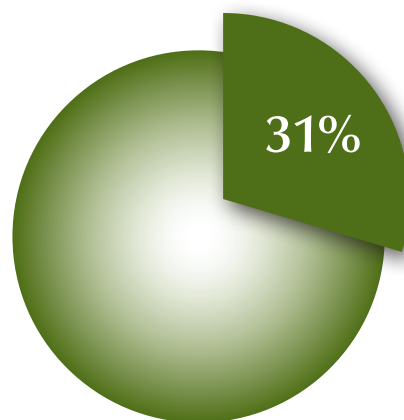
- Boomers have the most difficulty discussing independence issues with their parents; 42% say telling their parents that these older adults have to leave home is the most difficult topic.
- Boomers who are stuck in the parent/child role with their parents are much less likely to proactively begin conversations with their parents about a variety of issues than are other Boomers.
- Boomers whose parents live with them are the least comfortable of all adult children when it comes to discussing issues with their parents such as finances, health, Medicare/Medicaid benefits and driving.
- Gender of child plays a role: 57% of female children say they are very comfortable talking to their parents about needing help to live at home, as compared to just 41% of males.



- Gender of parent plays a role; nearly one in five Boomers with “just fathers alive” say these older men keep to themselves and this makes it difficult to help them.

## Roadblocks and Solutions

- One-third of Boomers say their parents are too independent and this makes it difficult to address issues such as convincing them to give up their car keys.
- Nearly one-third of Boomers say the continuation of the parent/child role is the biggest obstacle to communicating with their parents about difficult topics.
- Nearly one-quarter of Boomers say they wish they were more prepared to talk with their parents about these older adults’ plans for the future.
- One in ten Boomers use surrogates, such as family members or friends, to communicate to parents about health, financial, housing or care needs.
- As a solution to break the ice, 71% of Boomers recommend involving siblings or other family members and approaching parents together.
- To assist with communication, approximately half of adult children suggest seeking assistance from outside experts, such as eldercare professionals.



Say continuation of the parent/child role is the biggest obstacle to communicating with their parents about difficult topics.

## Roadblocks

## SURVEY METHODOLOGY

1,000 telephone interviews were completed in the U.S. (sampling error of +/-3.1 percent at a 95 percent confidence level) and 500 interviews were completed in Canada, excluding Quebec (sampling error of +/-4.4 percent at a 95 percent confidence level). Data analysis was performed by the Boomer Project of Richmond, Virginia: [www.boomerproject.com](http://www.boomerproject.com).

1 in 10

Use surrogates, such as a family member or friend, to communicate to their parents about their needs