

2021 Retirement Confidence Survey

This survey, conducted by Greenwald Research & the Employee Benefit Research Institute, is an unparalleled measure of worker and retiree attitudes and behaviors and the forces that affect them. With 30 years of compelling findings, this study is widely cited and is the longest-running survey of its kind.



New for 2021! Focus on Diversity: Retirement Confidence of Black & Latinx Workers and Retirees

We will be doing an oversample of key minority groups in 2021, as well as Spanish-language surveys, allowing the RCS to provide insights, including:

- Priorities of different ethnicities
- Role of family in saving
- Preferred sources of financial information
- Difference in sentiment and outcomes between minorities

Partner Benefits:

- Obtain full survey results—available only to sponsors!
- Provide input into the study and get key questions answered
- Use findings in marketing, and public relations efforts
- Get specialized breakouts of key target markets
- Benefit from being featured in survey reports, webinars, articles and events
- Engage with researchers to delve into survey findings

2020 Sponsors:

- | | |
|-------------------|---------------------|
| Capital Group | Nationwide |
| Columbia | Financial |
| Threadneedle | PIMCO |
| Invesco | Principal Financial |
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| Lincoln Financial | Segal |
| Mercer | |
| MetLife | |

Align your brand with the longest-running annual survey assessing how American workers and retirees save, plan, and achieve financial security for retirement.

Timeline:

Project Kickoff: October 2020

Survey Fielding: January 2021

Study Released: April 2021

Cost - \$12,000

EBRI | **greenwald**
research

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