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Collaborative Research, Actionable Insights

2023
Retirement Confidence Survey
FOCUS ON CAREGIVING

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 more than 30 years of compelling findings, this study is widely cited and is the longest-running survey of its kind.

New for 2023! Focus on Caregiving

In its 33rd year, the Retirement Confidence Survey turns its attention to the retirement challenges faced by workers and retirees who are caregivers of parents, spouses, or children with special needs.

In addition to its traditional core findings, the survey will compare workers and retirees to their caregiving counterparts when it comes to financial goals, planning for retirement, retirement confidence, preparing and transitioning to retirement, workplace savings, trusted sources of information, and income and spending in retirement.

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
- Be featured in survey reports, webinars, articles and events
- Engage with researchers to delve into survey findings

2022 Sponsors:

- AARP
- Ariel Investments
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- Ayco
- Bank of America
- BlackRock
- Capital Group
- Columbia Threadneedle
- Empower Retirement
- Fidelity Investments
- FINRA Foundation
- J.P. Morgan
- LGIMA
- Mercer
- Mutual of America
- Nationwide Financial
- New York Life
- PIMCO
- Principal Financial Group
- Prudential Retirement
- Retirement Clearinghouse
- T. Rowe Price
- The Segal Group
- U.S. Chamber of Commerce
- Wells Fargo

Timeline:

Project Kickoff: October 2022

Survey Fielding: Early 2023

Study Released: April 2023

Lock in your early bird rate before October 15, 2022!

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