

2025 Retiree Health Insights Program

This new multi-phase research program will explore the landscape of planning, decision-making, perspectives, and action regarding health care in retirement.

Key Issues to Address:

- Priorities for healthy living in retirement and needed support from the financial, insurance, and wellness industries
- Decision-making about health insurance coverage prior to and in retirement
- Sources and needs for guiding health saving and insurance decisions leading up to and in retirement, including the role of insurers, employers, non-profit organizations, and other industry players
- Exploration of hot topics which may include caregiving, aging in place, mental health, barriers to care, health/aging technology, and/or Supplemental Benefits

Audiences to Study:

- **Retirees:** those aged 65 or older (Medicare-eligible)
- **Pre-Retirees:** those aged 55-64 and who do not consider themselves retired
- **Financial Advisors and Health Insurance Agents/Brokers:** who advise on health care costs in retirement, Medicare plan selection, or supplemental products like long-term care insurance

A FOUR-PHASE RESEARCH PROGRAM



Phase 1

Interviews with Advisors, Agents, Brokers (n=10)



Phase 2

Survey of consumers aged 55 and older, classified as pre-retiree and retiree (n=1,000)



Phase 3

Survey of Advisors, Agents, Brokers (n=250)



Phase 4

Interviews with consumers aged 55 and older (n=10)

February
Kick-off

March
Advisor/Broker
Interviews

May-June
Quantitative
Surveys

August
Consumer
Interviews

What Sponsors Receive

- Input on all phases of research
- Detailed reports on each phase that include key findings, interpretations, and recommendations
- Data tabulation books and data files
- Individual sponsor webinar or presentation of results
- Opportunities to share in media and industry attention

Cost: \$19,500

Early Bird Pricing (Sponsor by 1/31/2025): \$18,525

 **greenwald**
research

For additional information on the study design or sponsorship, contact

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