



2027 Retirement Confidence Survey

FOCUS ON PARENTS

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 35+ years of compelling findings, this study is widely cited and is the longest-running survey of its kind.

Focus on Parents

In its 37th year, the Retirement Confidence Survey will have a special focus on the retirement preparation, experiences, and challenges of parents and guardians in different life stages.

In addition to its traditional core findings, the survey will compare workers and retirees without children to parents 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

Past Sponsors:

- AARP
- Bank of America
- BlackRock
- Capital Group
- Edward Jones
- Empower
- Fidelity
- FINRA
- Foundation
- Jackson National
- J.P. Morgan
- Mercer
- MetLife
- Mutual of America
- Nationwide Financial
- New York Life
- Principal Financial Group
- Protective
- Prudential/PGIM
- T. Rowe Price
- Voya
- Wells Fargo

Timeline:

Project Kickoff: October 2026

Survey Fielding: January 2027

Study Released: April 2027

Cost: \$13,500

EBRI | greenwald
research

For additional information,
contact Lisa Greenwald at
lisagreenwald@greenwaldresearch.com.