ECONOMIST ENTERPRISE

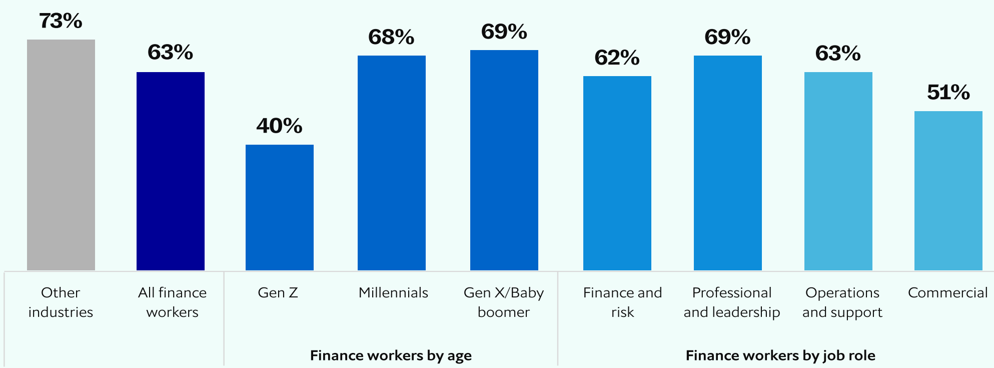
Lower confidence in retirement decisions

Supported by nuveen
A TIAA Company

Confidence in retirement decisions lags in finance—particularly among Gen Z and commercial roles

"I am well equipped to make financial decisions about retirement"

Percentage who agree



Source: Economist Enterprise 2025 US Benefits 2.0 survey

Only 63% of financial services workers feel well equipped to make retirement decisions, compared with 73% in other industries, according to the latest Benefits 2.0 survey conducted by Economist Enterprise and supported by Nuveen. This gap may reflect the complex and variable financial decisions workers often face in the sector.

Confidence is particularly low among Gen Z workers (40%) and those in commercial-facing roles (51%), despite higher levels among those in professional and leadership roles (69%).

These differences point to a broader challenge: even in a financially sophisticated sector, confidence is uneven and shaped by role and experience. This suggests that the complexity of benefits—alongside differences in financial position, experience and expectations—may be limiting how effectively workers understand, navigate and act on their options.

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