

2024 Open Enrollment Survey

Methodology

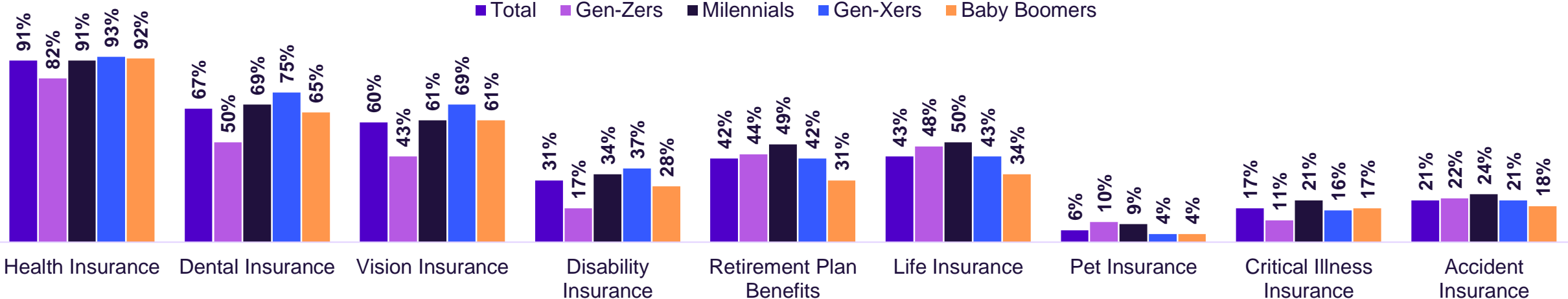
The 2024 Corebridge Open Enrollment survey was conducted online by Morning Consult on behalf of Corebridge Financial between Aug. 2-3, 2024, among a national sample of 1,035 adults.



Open Enrollment: Planning & Perceptions

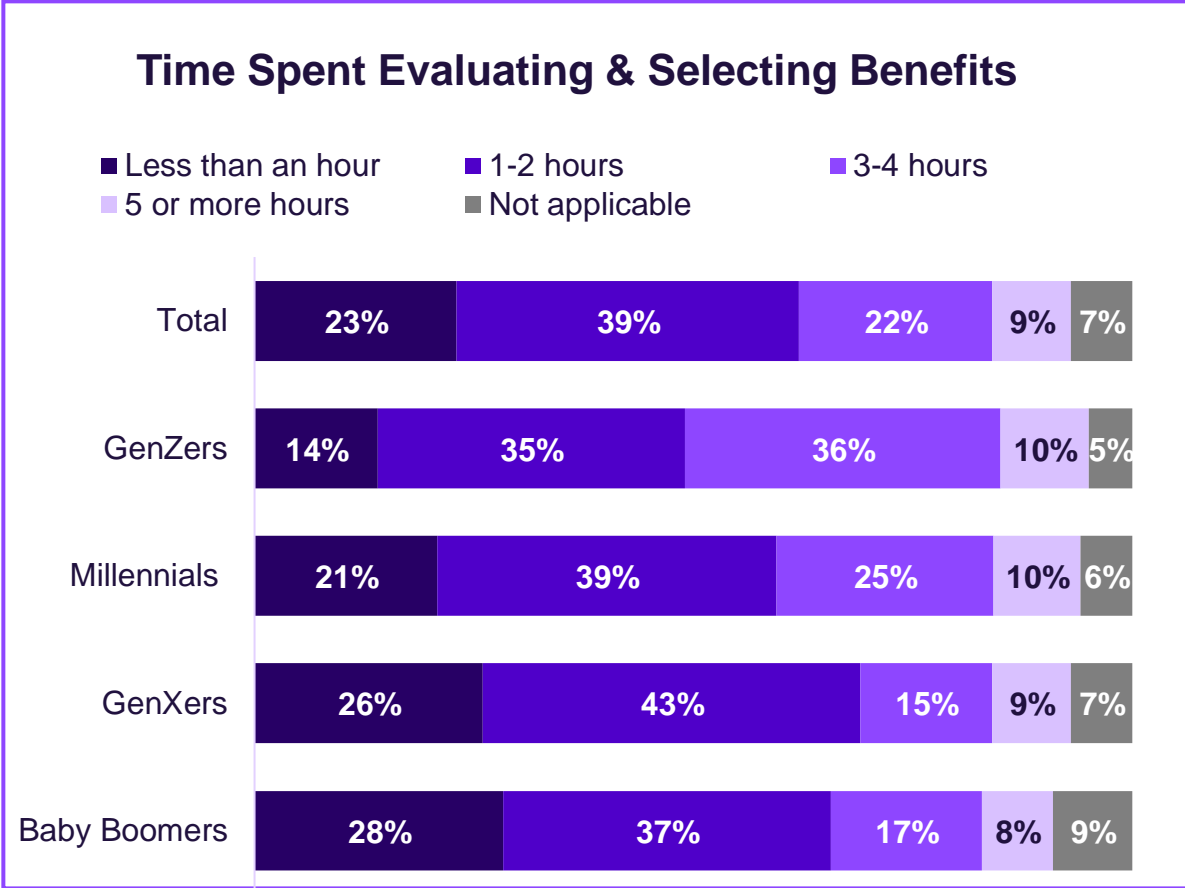
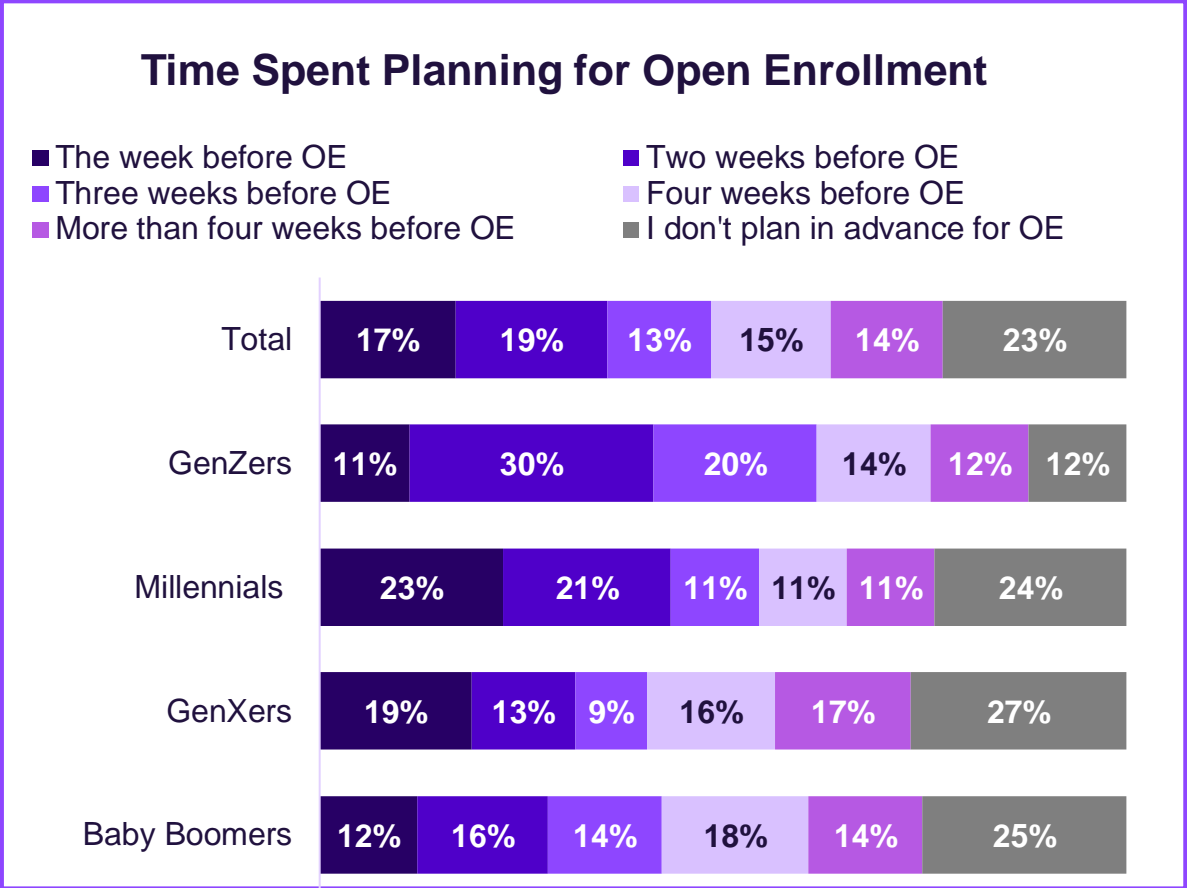


Open Enrollment Benefits



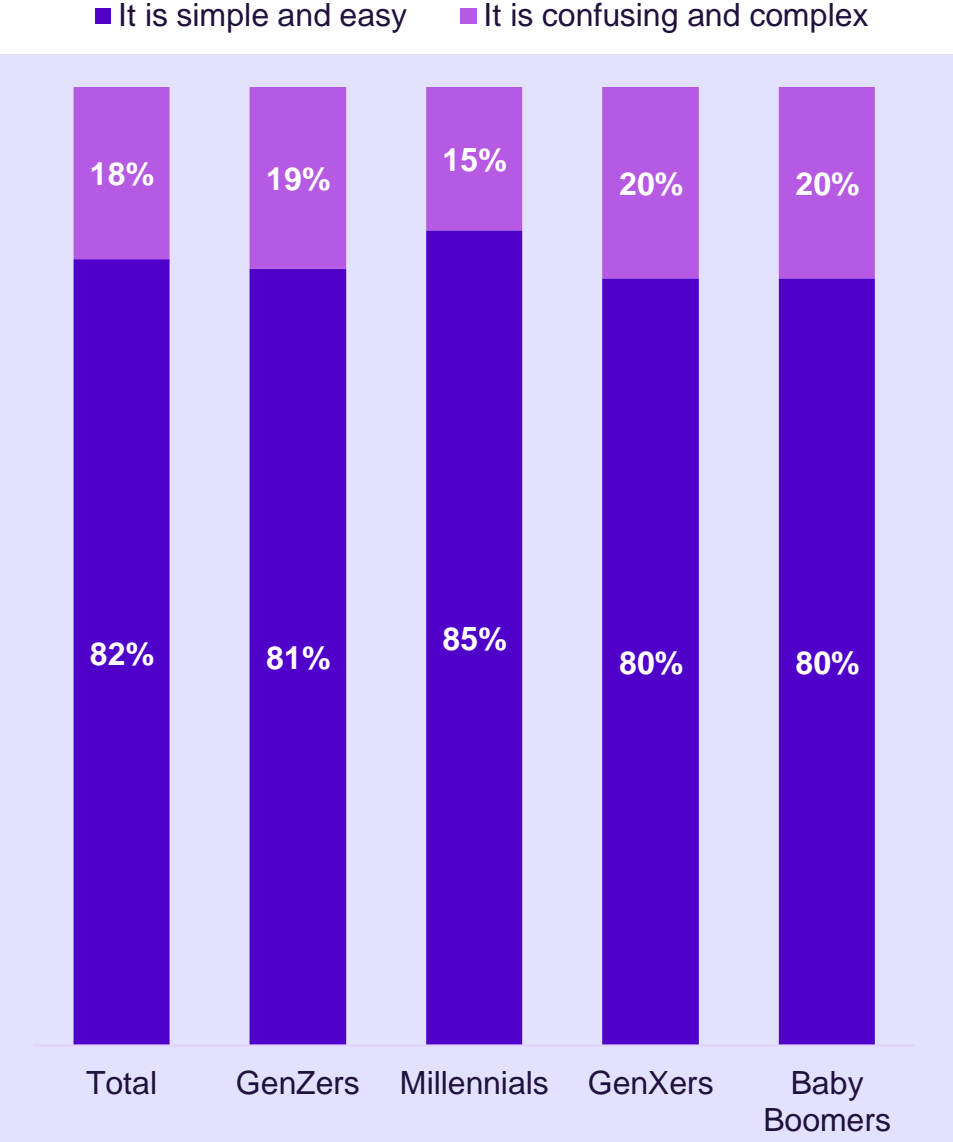
1. Which of the following benefits do you typically correlate with 'open enrollment'. Select all that apply. | Base: All respondents

Open Enrollment: Benefits Planning & Evaluation

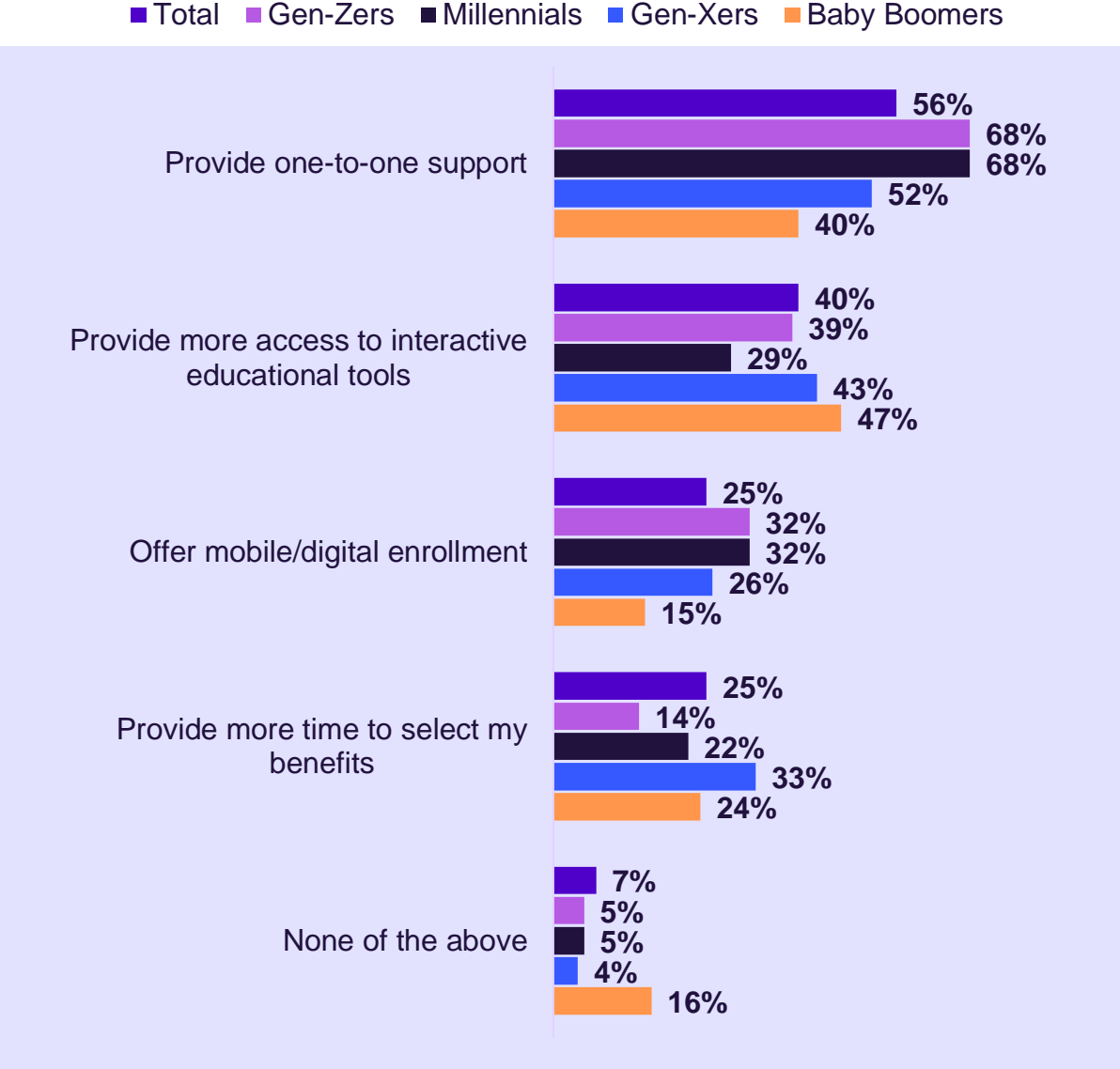


2. How far in advance do you start planning your benefit selections before open enrollment begins? | 3. On average, how much time do you spend evaluating and selecting your benefits during open enrollment? | Note: OE=Open Enrollment | Base: All respondents

Open Enrollment Experience



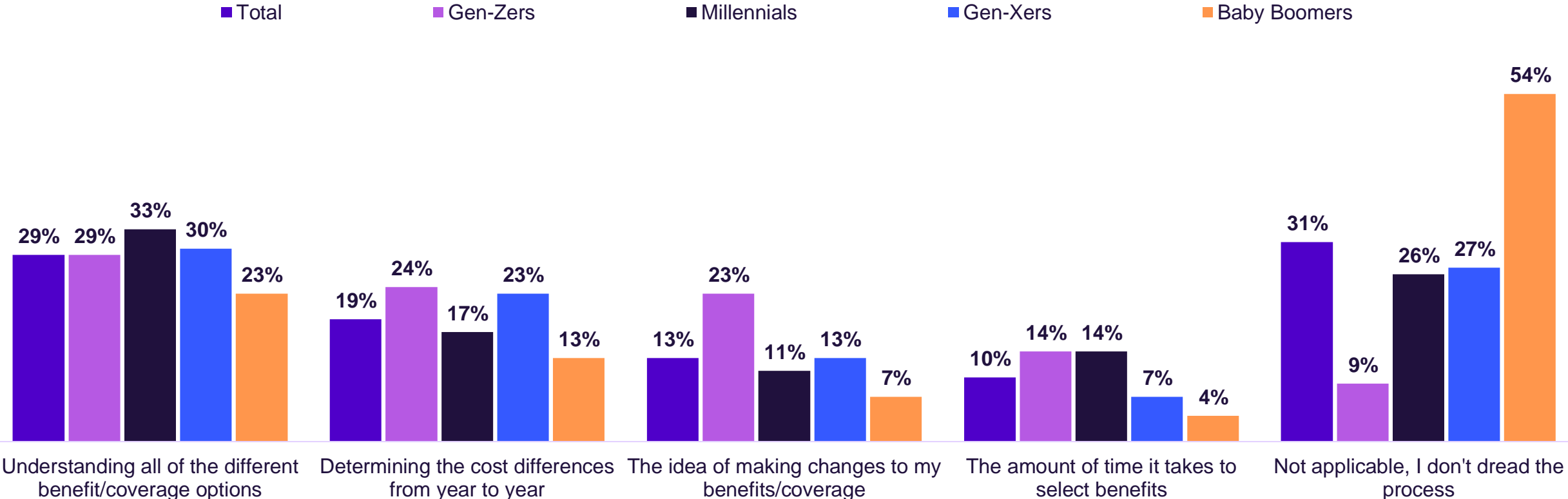
4. How would you describe your employer's open enrollment period? | Base: All respondents



4a. How could your employer make it easier to enroll in benefits? Base: Respondents who selected "confusing and complex"



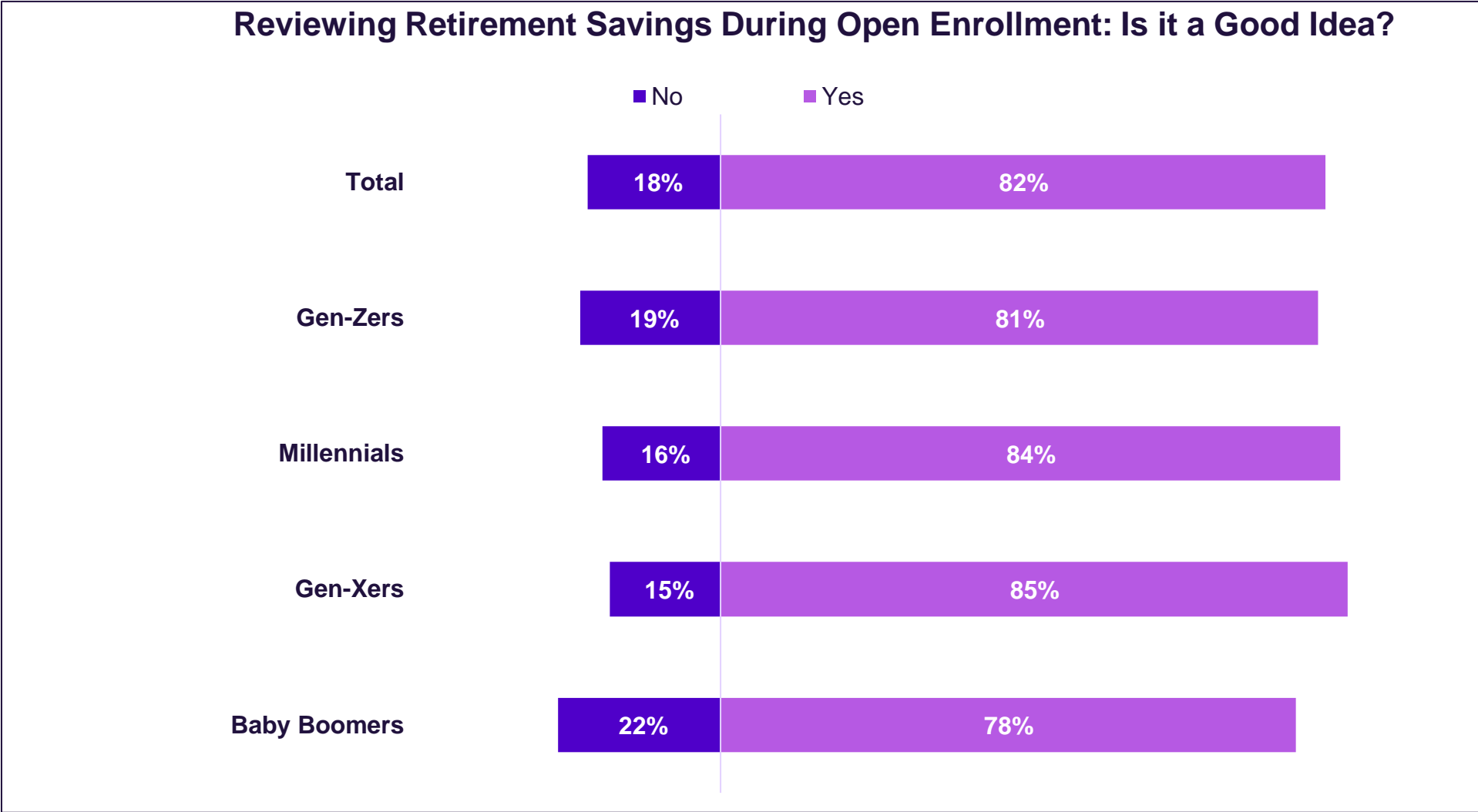
Open Enrollment: Most Dreaded Aspect



Retirement Planning

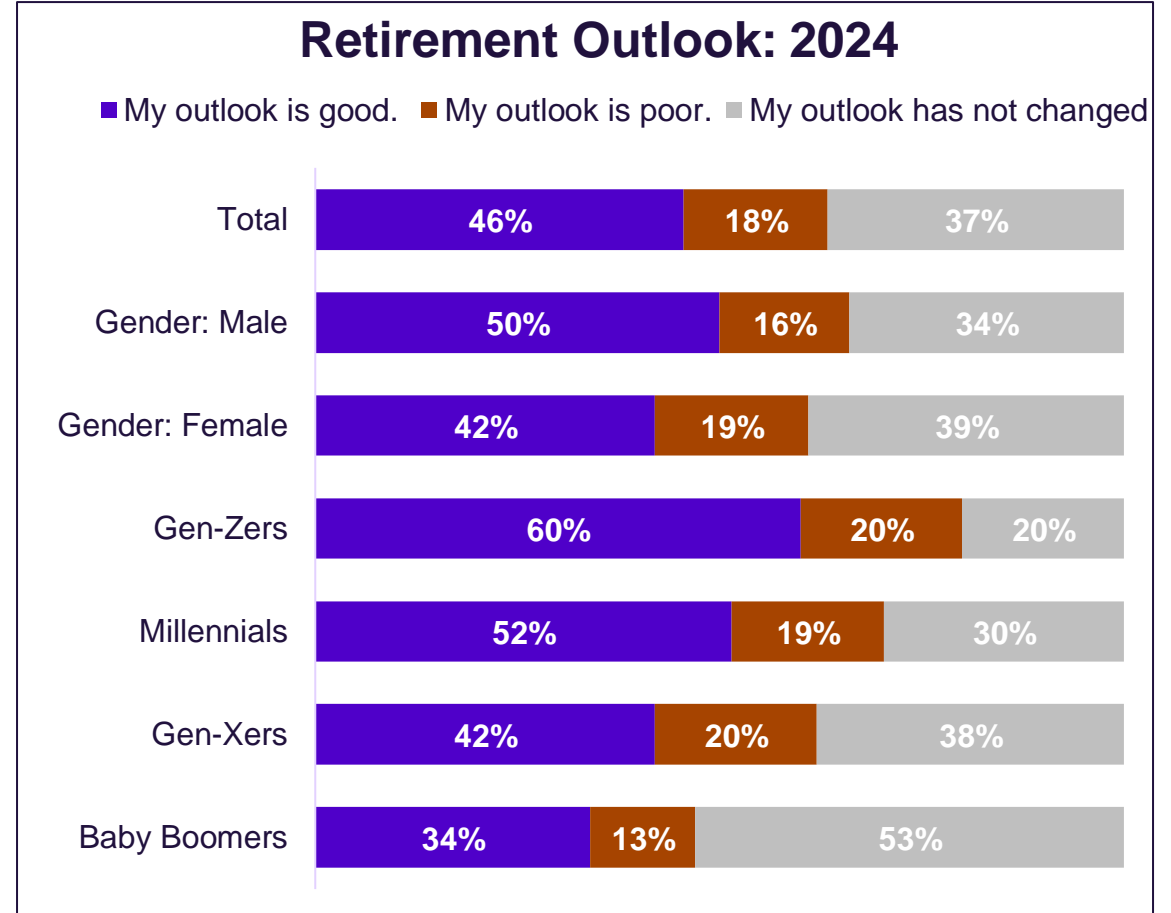
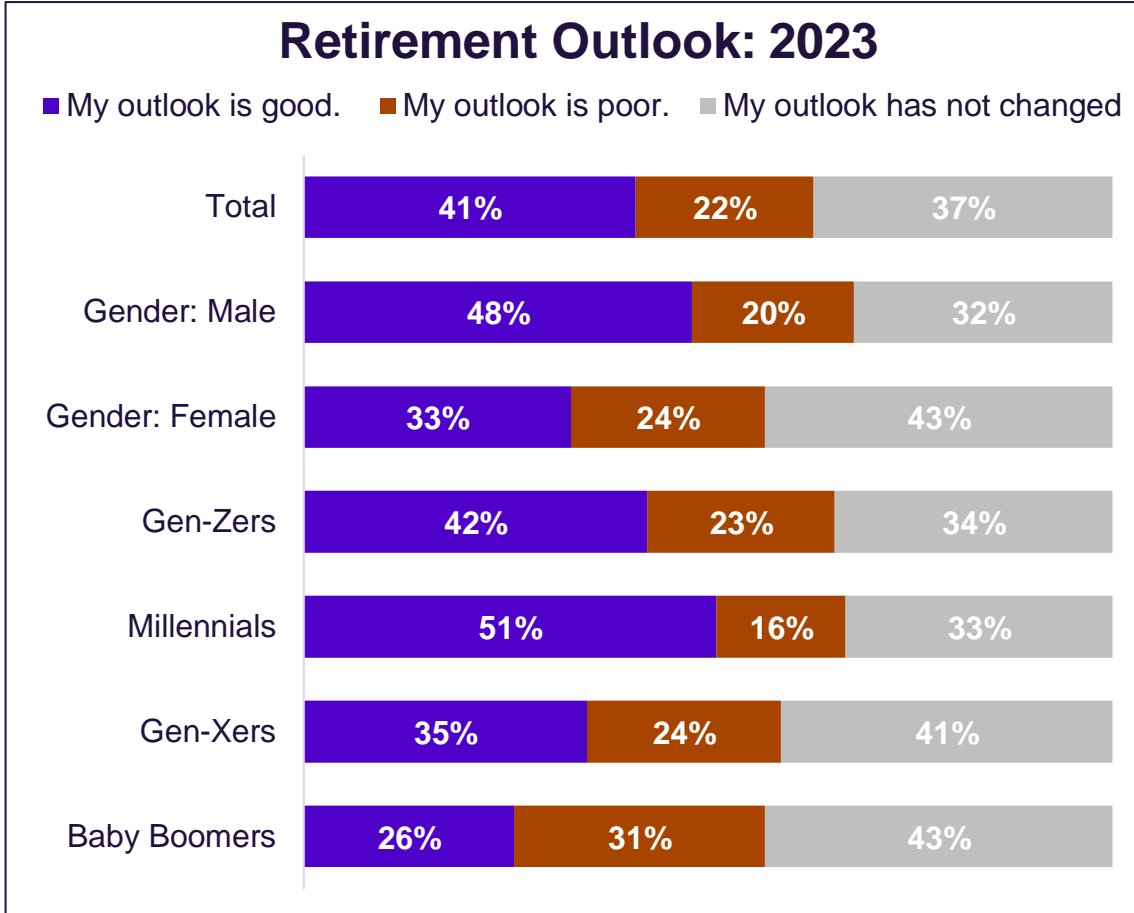


Open Enrollment: Reviewing Retirement Savings



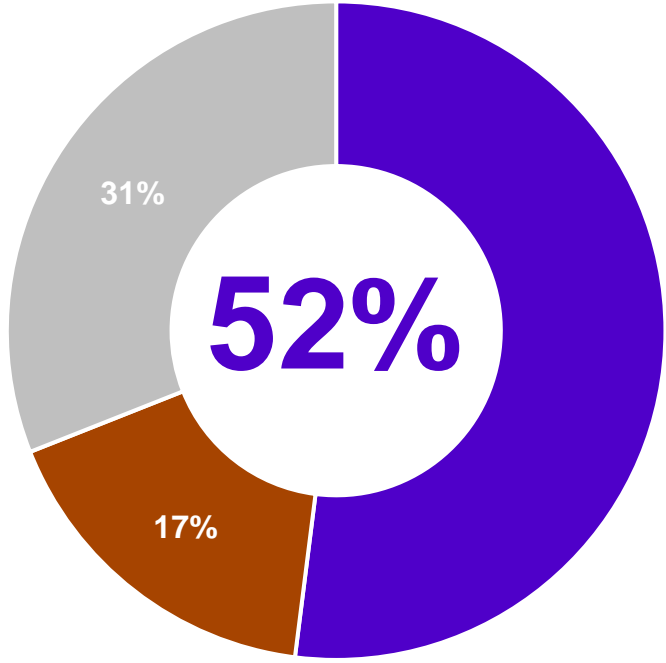
6. Do you think it's a good idea to review your retirement savings plan while you select other workplace benefits during your company's open enrollment period? | Base: All respondents

Open Enrollment: Retirement Outlook

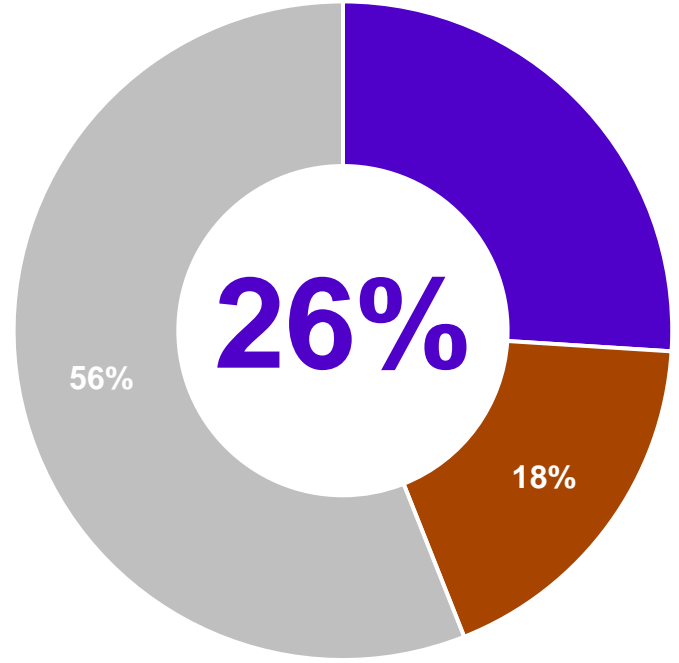


Open Enrollment: Retirement Outlook (Planning Groups)

Retirement Outlook: Plans Ahead for Open Enrollment



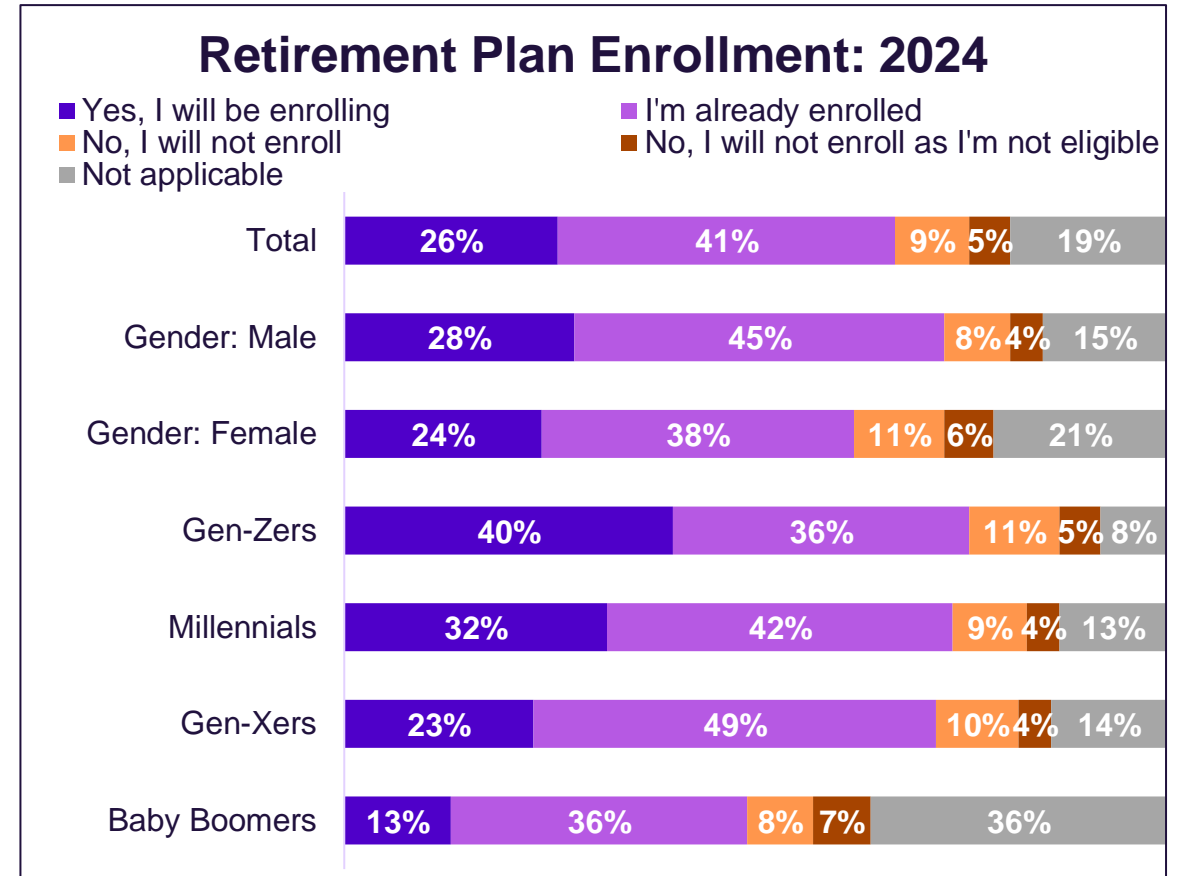
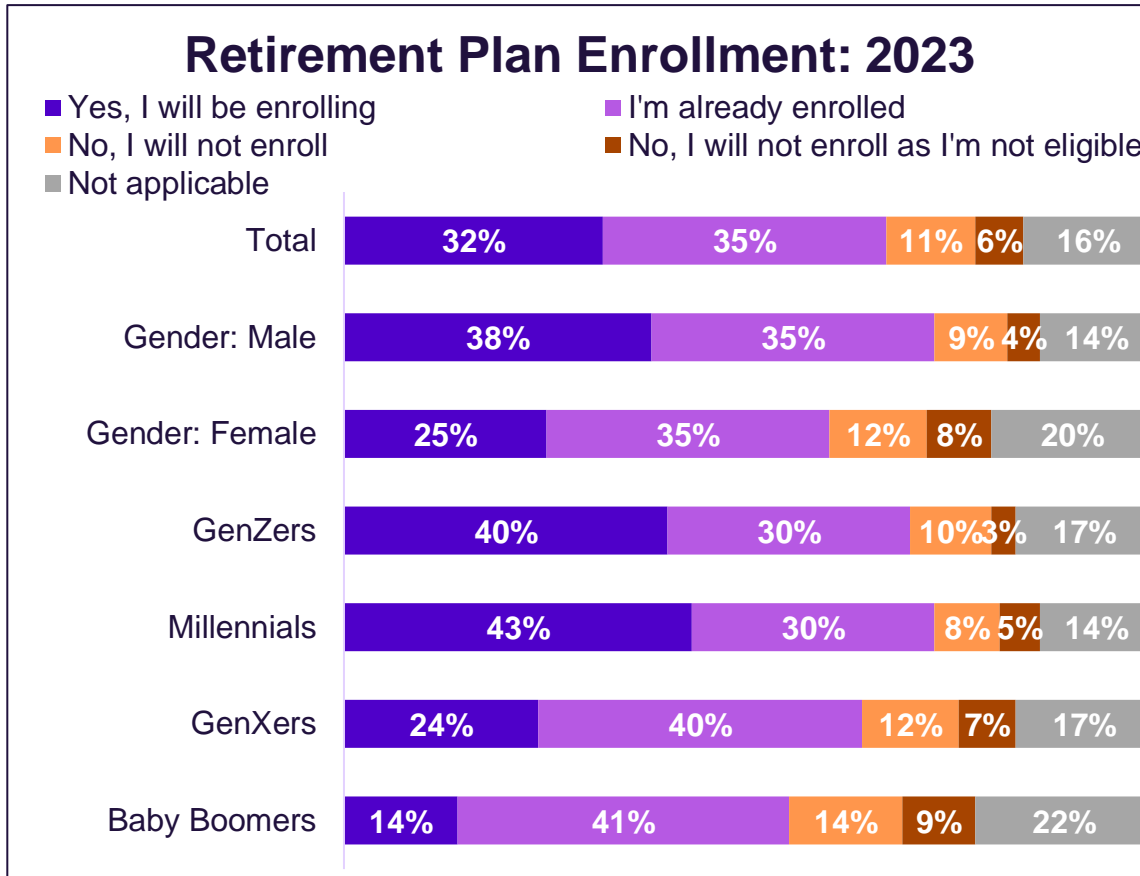
Retirement Outlook: Does Not Plan Ahead for Open Enrollment



■ My outlook is good. ■ My outlook is poor. ■ My outlook has not changed

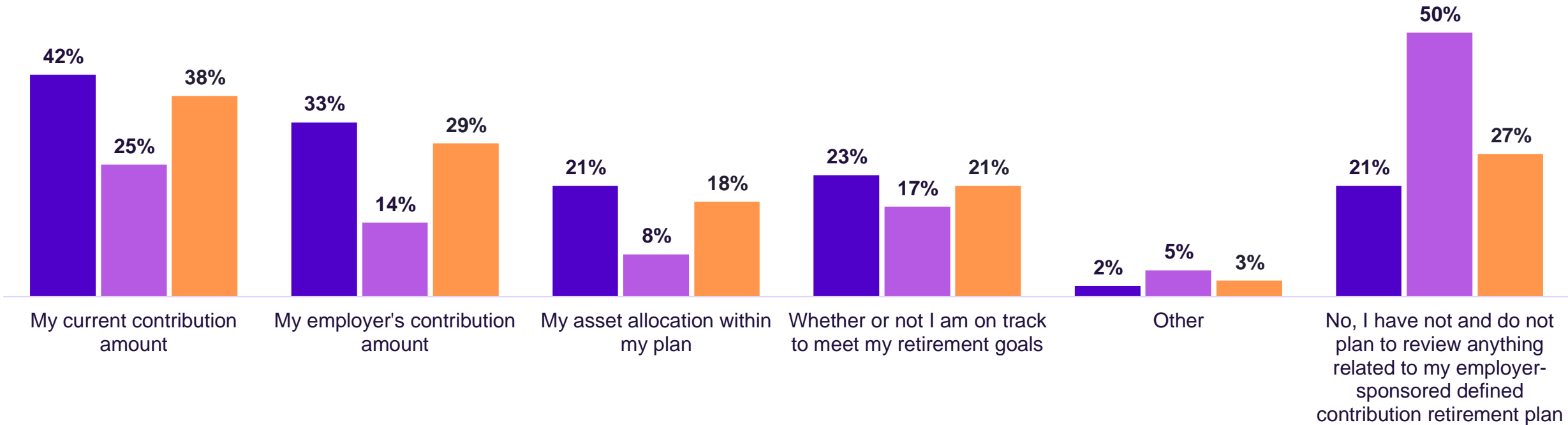


Open Enrollment: Retirement Plan Enrollment



Open Enrollment: Retirement Plan Review (Planning Groups)

■ Plans Ahead for Open Enrollment ■ Does Not Plan Ahead for Open Enrollment ■ Total



9. During your employer's open enrollment period this year (for 2025), have you or do you plan to review any of the following related to your employer-sponsored defined contribution retirement plan (401(k), 403(b), 457)? Select all that apply.

Contributions

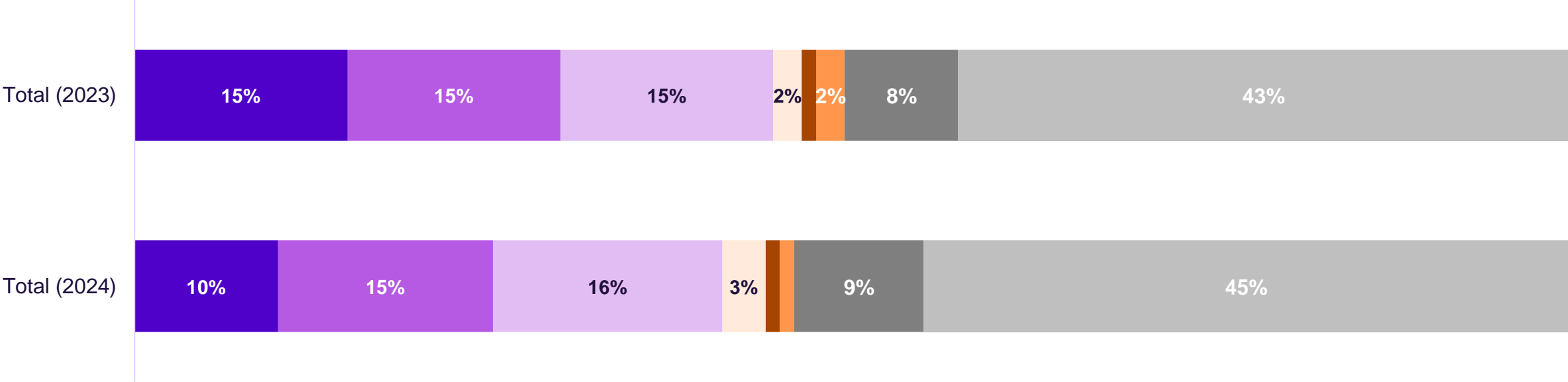
Section

3



Open Enrollment: Contribution Changes

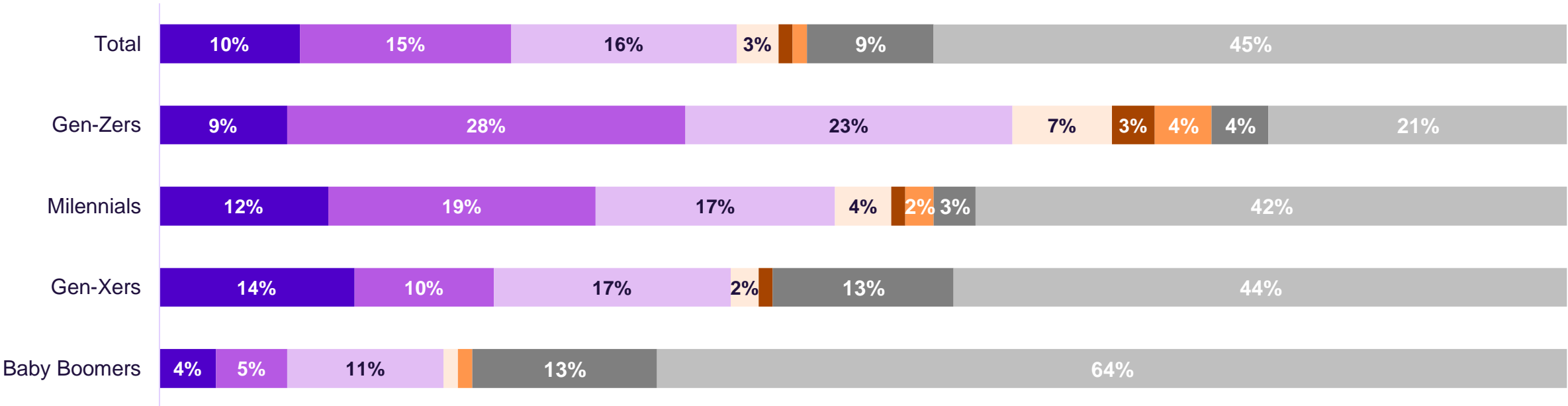
- Increase my contribution by 1%
- Increase my contribution by 2%
- Increase my contribution by 3 or more %
- Decrease my contribution by 1%
- Decrease my contribution by 2%
- Decrease my contribution by 3 or more %
- No, I already contribute the maximum amount allowed by the IRS
- I do not plan to make any changes



10. During your employer's open enrollment period (for 2025), do you plan to make any changes to the amount you contribute to your defined contribution retirement plan (401(k), 403(b), 457)? | Base: All respondents. Note: Value ≤1% have been removed

Open Enrollment: Contribution Changes (Generational)

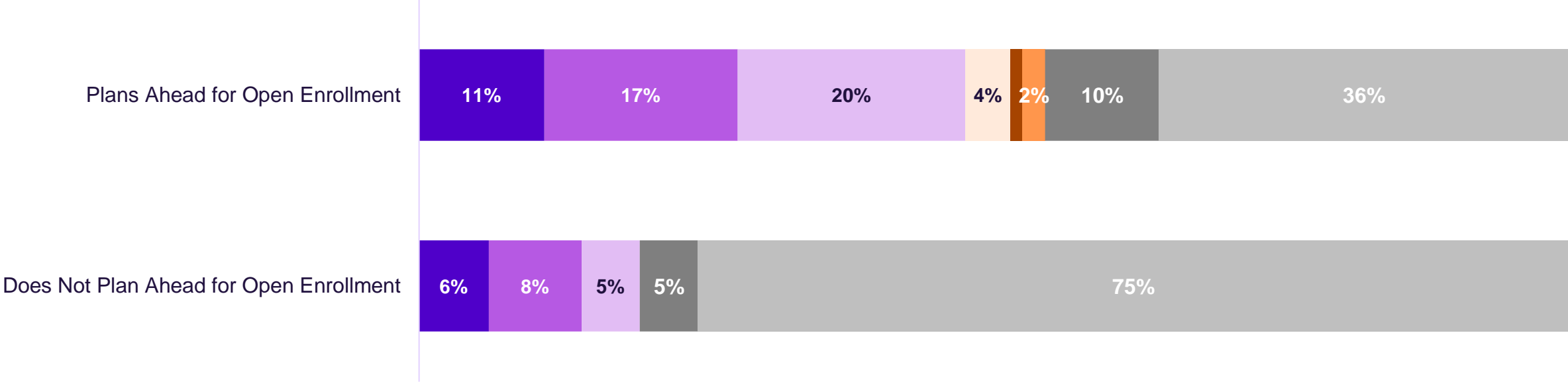
- Increase my contribution by 1%
- Increase my contribution by 2%
- Increase my contribution by 3 or more %
- Decrease my contribution by 1%
- Decrease my contribution by 2%
- Decrease my contribution by 3 or more %
- No, I already contribute the maximum amount allowed by the IRS
- I do not plan to make any changes



10. During your employer's open enrollment period (for 2025), do you plan to make any changes to the amount you contribute to your defined contribution retirement plan (401(k), 403(b), 457)? | Base: All respondents. Note: Value ≤1% have been removed

Open Enrollment: Contribution Changes (Planning Groups)

- Increase my contribution by 1%
- Increase my contribution by 2%
- Increase my contribution by 3 or more %
- Decrease my contribution by 2%
- Decrease my contribution by 1%
- Decrease my contribution by 3 or more %
- No, I already contribute the maximum amount allowed by the IRS
- I do not plan to make any changes



10. During your employer's open enrollment period (for 2025), do you plan to make any changes to the amount you contribute to your defined contribution retirement plan (401(k), 403(b), 457)? | Base: All respondents. Note: Value ≤1% have been removed

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