Methodology

- The second IFIE Global Investor Education Survey was conducted in the fall of 2010.
- The survey targeted current IFIE members and other investor education organizations/professionals who had been invited to participate in earlier IFIE events.
- Responses were provided by 68 organizations (a 35% increase over the last survey in 2009)—30 IFIE members and 38 non-members.
- 26 IFIE regional committee members provided responses—19 from AFIE and 7 from MENA.
- Six survey respondents operate on a global basis and 29 focus on a specific country continuing the pattern from the last survey of local focus.

**Full survey findings are available to Members of IFIE.**
Executive Summary

The second annual IFIE Global Investor Education Survey by the International Forum for Investor Education found:

- A growing global participation in investor education.
- Despite the world wide economic downturn, spending on investor education has remained strong.
- Spending in 2011 is expected to increase (47%) or remain the same (50%) by respondents.
- 70% of respondents reported measuring some or all of their programmes.
- 86% reported using financial services professionals to deliver investor education programmes.
Type of Survey Respondents

- IFIE Member: 38
- Non Member: 30

* Limited to full set of responses.
Type of Market

Developed
- IFIE Member: 7
- Non Member: 6

Emerging
- IFIE Member: 17
- Non Member: 19

Regional
- IFIE Member: 7
- Non Member: 7

Global
- IFIE Member: 11
- Non Member: 2

* More than one response permitted.
Types of Programmes/Activities

- Activities in More Than One Language
  - IFIE Member: 18
  - Non Member: 4

- Create Curriculum, Skill-Building or Training Materials
  - IFIE Member: 12
  - Non Member: 12

- Develop Nat’l/Reg’l Strategies, Oversee/Regulate Providers
  - IFIE Member: 8
  - Non Member: 12

- Create/Provide Services (But Not Delivery)
  - IFIE Member: 13
  - Non Member: 11

- Investor Ed For adults
  - IFIE Member: 21
  - Non Member: 22

- Investor Lit For Adults
  - IFIE Member: 18
  - Non Member: 16

- Financial Lit For Adults
  - IFIE Member: 15
  - Non Member: 12

- Financial Ed Through Ages 18-21
  - IFIE Member: 17
  - Non Member: 14

* More than one response permitted.
Expected Spending on Programmes/Activities in 2011 (in US Dollars)

- Spending expected to continue to grow next year for nearly half (47%) of respondents.
The number of respondents reporting that they served more individuals in the current year dropped to 16% in 2010 from 63% in 2009 suggesting a focus on existing programmes.
About IFIE

- The International Forum for Investor Education — IFIE — is a unique alliance chartered in 2005 that brings together private sector and public sector providers of investor education to improve the effectiveness of investor education programs around the world.
- The IFIE website (www.ifie.org) serves as a clearinghouse for the exchange of information and ideas among providers of investor education from different jurisdictions, including organizations that are just developing or planning to develop investor education programs.
- For more information, contact secretariat@ifie.org.