



INTERNATIONAL FORUM FOR INVESTOR EDUCATION

IFIE 2ND GLOBAL INVESTOR EDUCATION SURVEY

Public Highlights Version: November 2010

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.

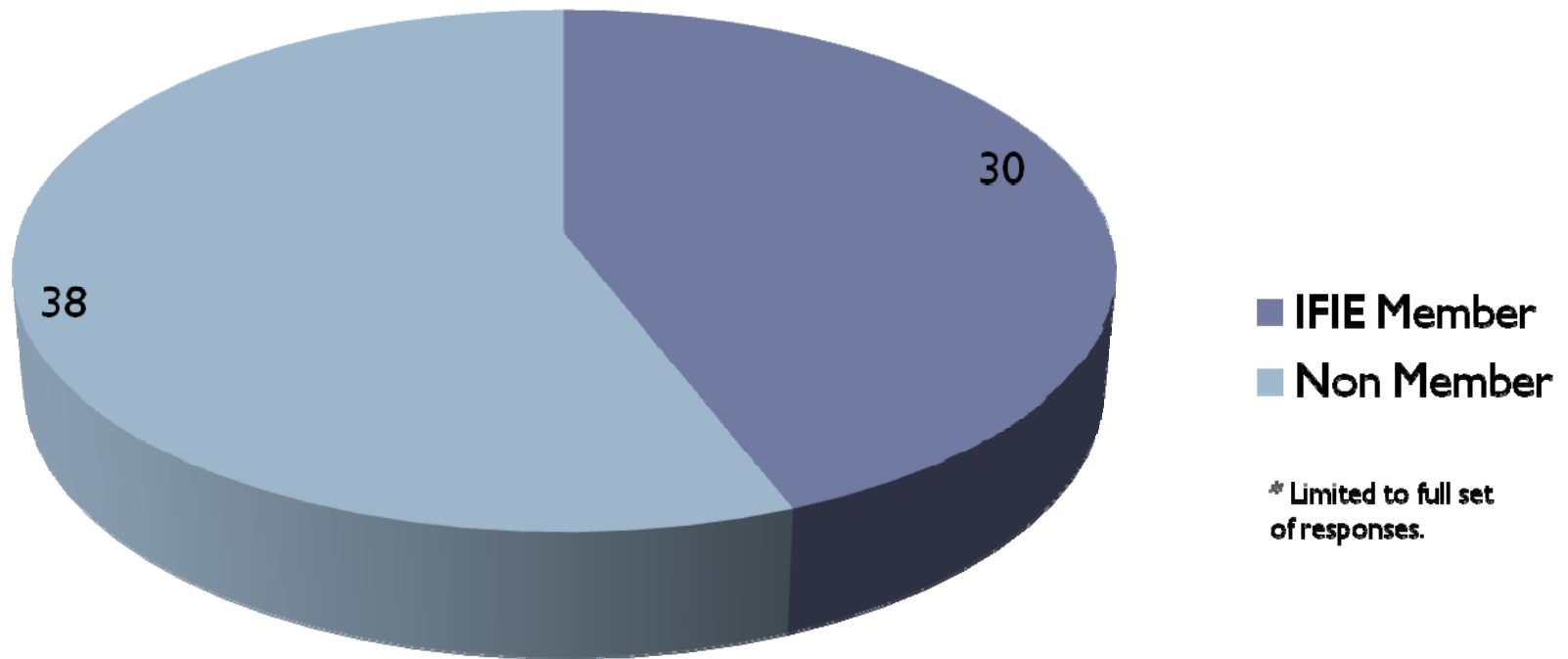
Full survey findings are available to Members of IFIE.

Executive Summary

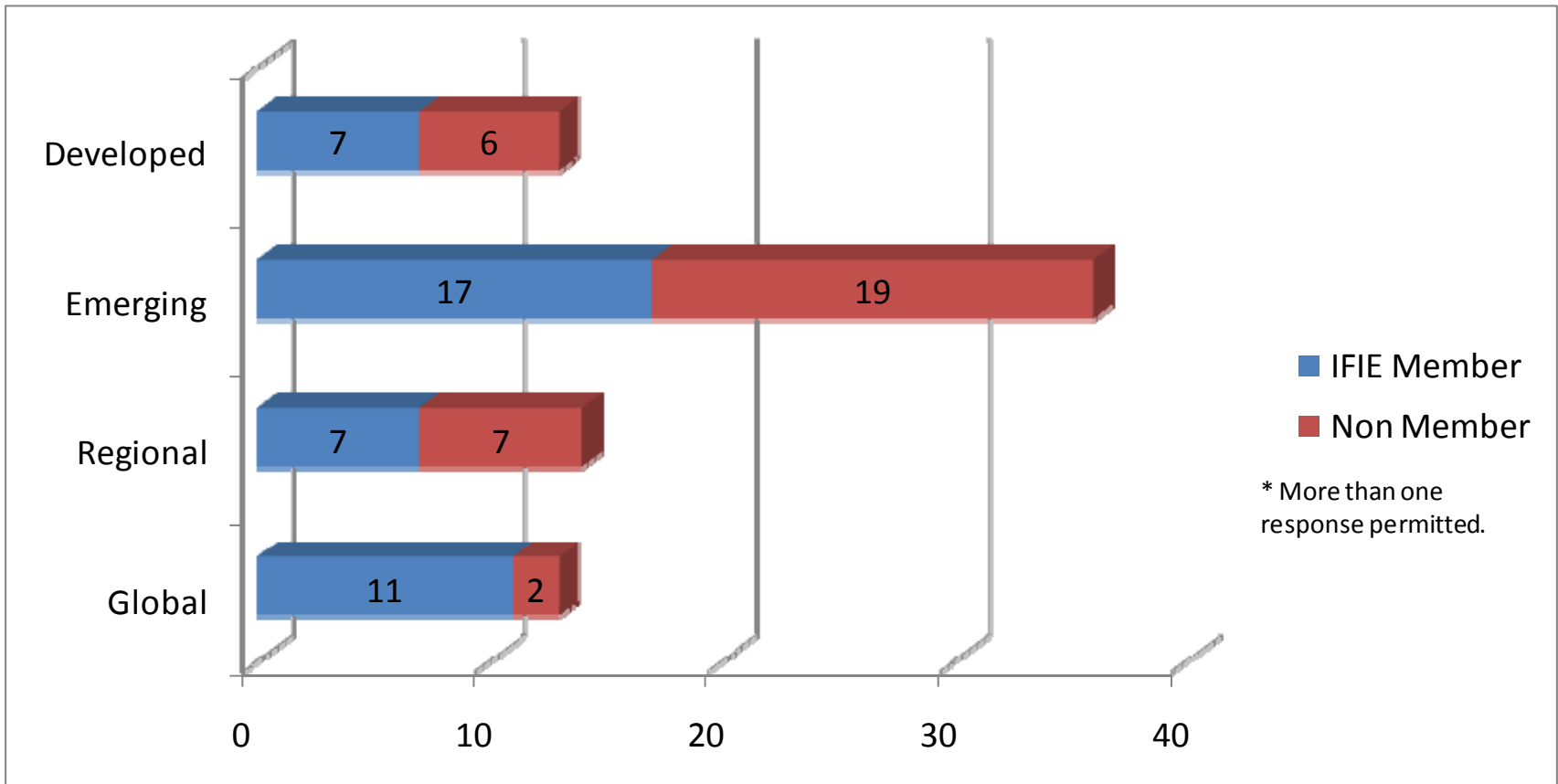
The second annual IFIE Global Investor Education Survey by the International Forum for Investor Education found:

- ▶ 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.

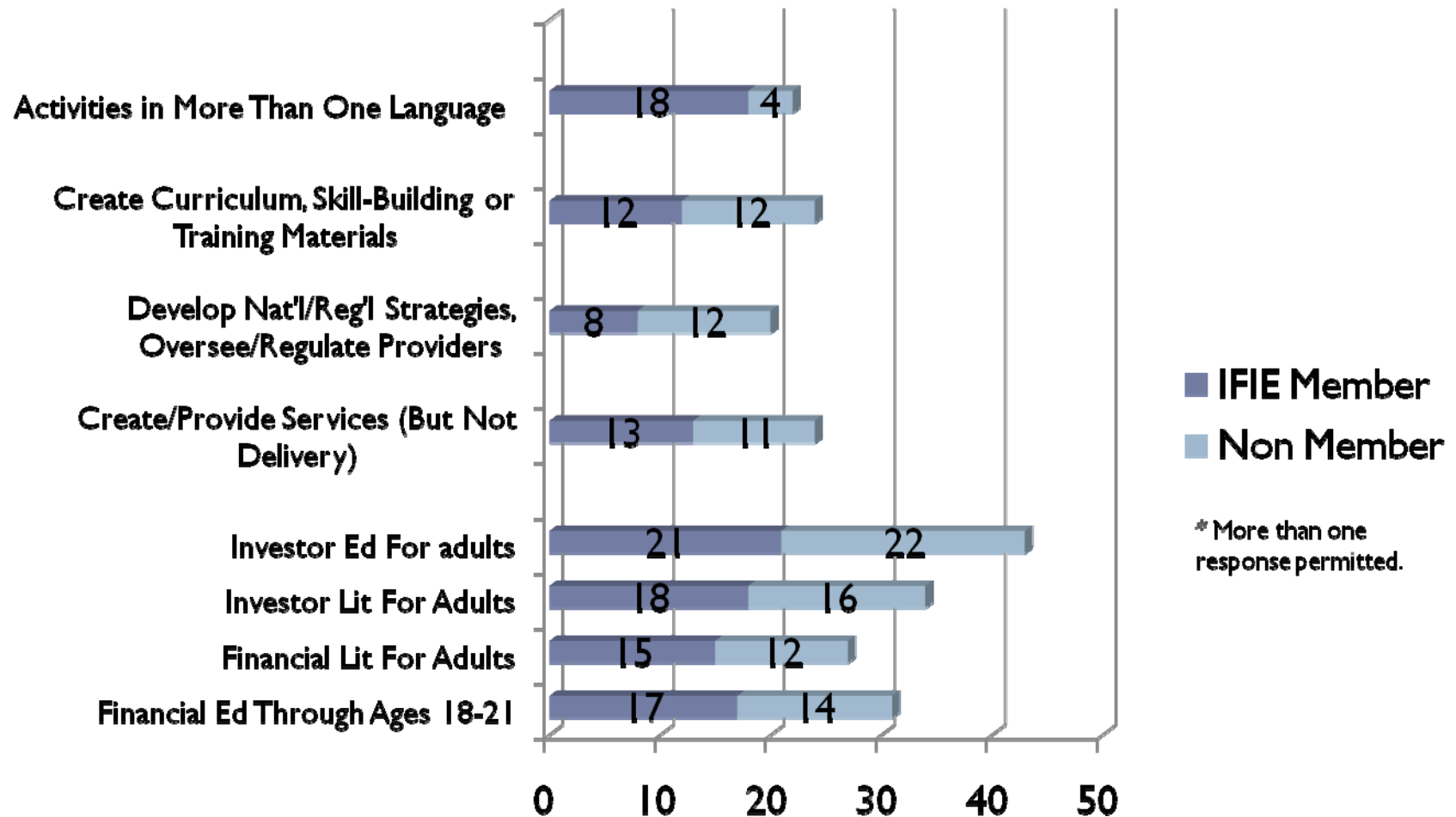
Type of Survey Respondents



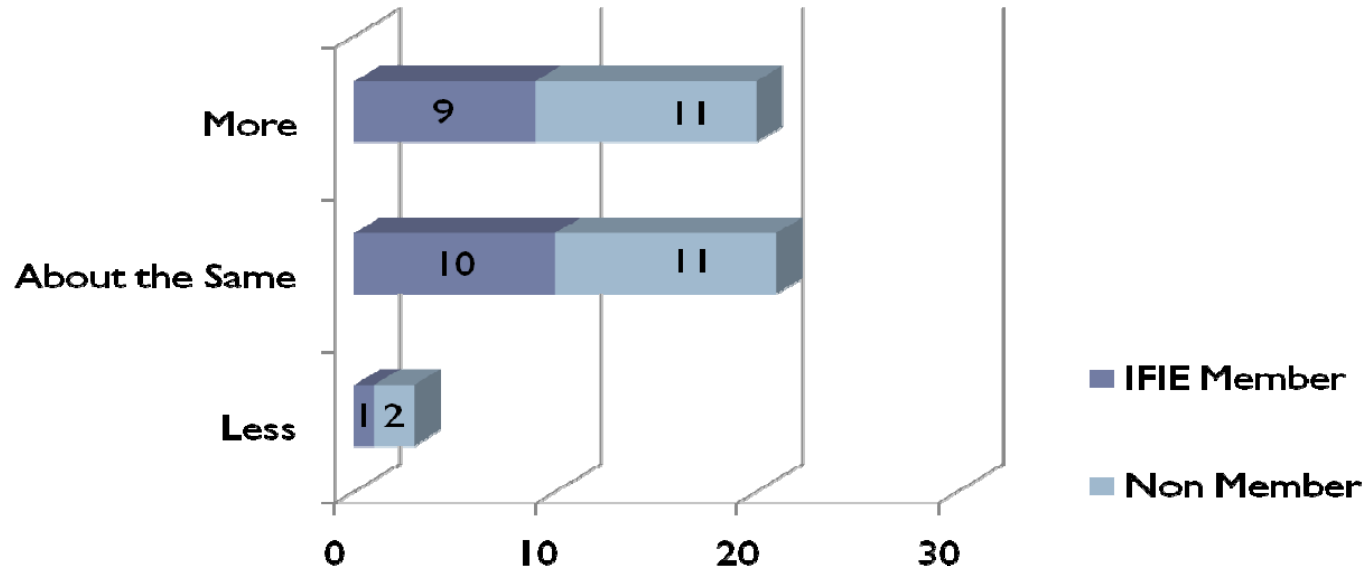
Type of Market



Types of Programmes/Activities

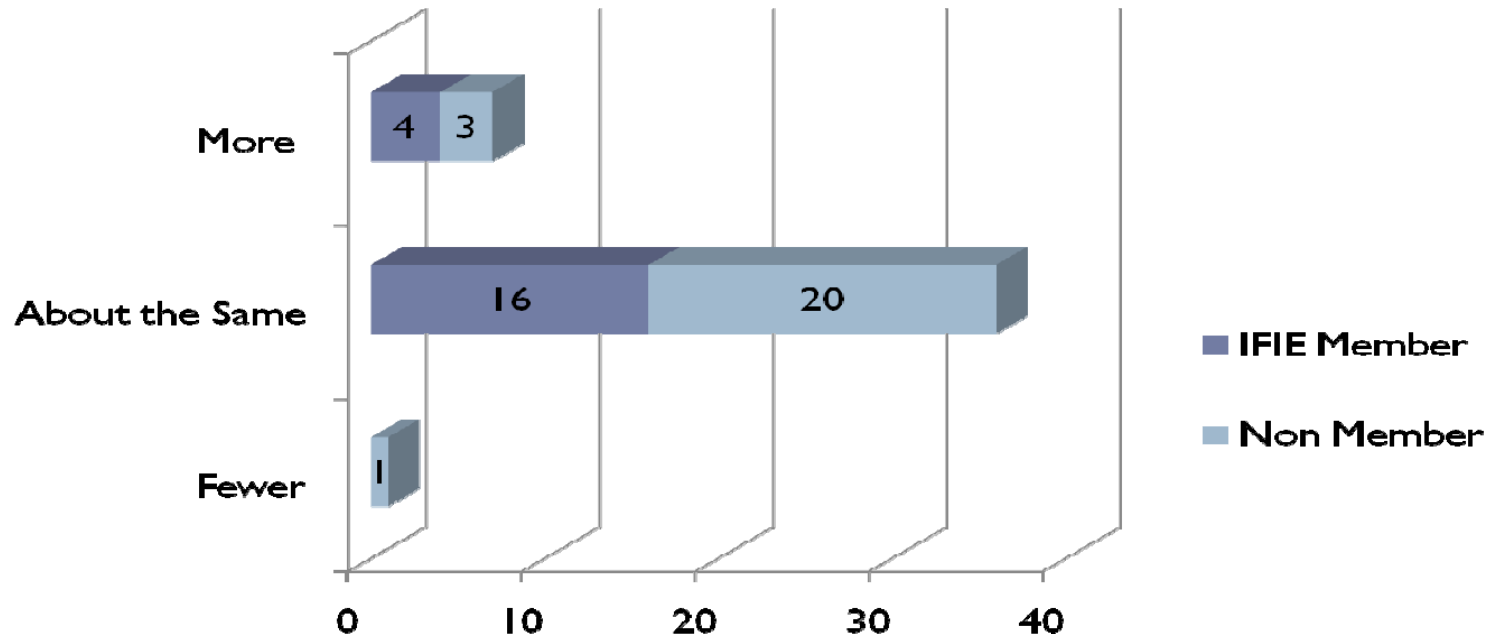


Expected Spending on Programmes/ Activities in 2011 (in US Dollars)



- ▶ Spending expected to continue to grow next year for nearly half (47%) of respondents

Individuals Served (*Current Year Versus Last Year*)



- ▶ 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.