



Adult Financial Literacy Needs Survey

Conducting a survey is one way to determine the existing knowledge about financial literacy concepts among participating adults. It is important to inform participants that the survey is simply to guide the design of the financial literacy activities. Leaders should also consider putting surveys into a digital format that will automatically tabulate results and provide options to create graphs and tables for use in reports and presentations.

Below are a few guiding questions for determining the financial literacy needs of participants. You can modify the questions to fit your program needs.

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We want to make awesome financial literacy program activities and provide the best learning experience possible! To help us do that, please tell us what you already know about financial practices. We will use your answers only to help develop financial literacy activities that fit the needs of our community adult members.

Please answer the following questions:

Describe your interest in learning more about how to manage credit or reduce debt? Or, if you are not interested, enter “not interested.”

What are some items you would include on a personal budget for your household expenses?

What are the merits or disadvantages of short-term loans, like a “payday loan” or title loan, as compared to charging an item on your credit card?



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Based on the previous question, are there other alternatives if something costs more than you have?

(Insert additional question)

(Insert additional question)

Are there other areas related to financial practices that you want to learn more about?