

Name	Description
Identifier	Mystery_ESIP_2021
Title	Mystery shopping campaign ESIP 2021
Description	<p>The focus of the this mystery shopping campaign was to assess the compliance with the new MiFID II regulation and broader sustainability motivations. We allocated 6 hypothetical investor profiles to the mystery shoppers including e.g. Risk - averse, balanced and risk taker, and 2 groups per profile: want to invest green and agnostic. We assessed the following topics (please note that for duty of confidentiality we removed personal information of mystery shoppers and the bank name and recommended products):</p> <ul style="list-style-type: none"> - Explanation of sustainability preferences - Advisor knowledge and expertise - Identification of sustainability preferences - Financial product presentation/recommendation - Final conclusion of the meeting
Creator	2 Degrees Investing Initiative
Keywords	retail investor, sustainable finance, mystery shopping, MiFID II regulation
Date	2021
Geographic coverage	Denmark, Estonia, Ireland, Germany, Greece and Romania.
Type of data	Feedback Form
Number of observations	199
Data collection company	Bare International
Data collection method	In-person interview + a few online interviews
Sample	6 profiles : low, average and high risk tolerance and for each one agnostic or interested in investing green mystery shopper
Language	English
Variables	See "name variables" on Tables_Excel/Documentation
Data format	xlsx, R file
Related publications	https://2degrees-investing.org/resource/please-dont-let-them-be-misunderstood/
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