

Name	Description
Identifier	Mystery_2022
Title	Mystery shopping campaign 2022
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 4 hypothetical investor profiles to the mystery shoppers including e.g. an impact-oriented green investor profile or a pure value-oriented investor profile. 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	2022 - 2023
Geographic coverage	Denmark, Estonia, Germany, Greece, Ireland and Romania
Type of data	Feedback form
Number of observations	253
Data collection company	Bare International
Data collection method	In-person interview mainly
Sample	<p>3 different profiles of mystery shoppers:</p> <ul style="list-style-type: none"> - one wants to invest in line with the established concept of sustainably preferences - one would like to invest in a way which generates positive impact in the real world - one wants to be sure its investments are in no way connected to pesticides or tobacco
Language	English
Variables	See "name variables" on Tables_Excel/Documentation
Data format	xlsx, R file
Related publications	<p>https://2degrees-investing.org/resource/assessing-client-sustainability-preferenceslost-in-the-maze/</p> <p>https://2degrees-investing.org/resource/moving-the-blockers-of-retail-sustainable-finance/</p>
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