

Survey\_ESIP\_2021 {Data.2DII}

# Survey ESIP 2021

## Description

The survey assets to retail investors green consumer preferences. It contains: A. sociodemographic information, B. Believes, C. Sustainability objectives, D. Personal causes, E. Trade-offs, F. Green energy transition, G. Sustainability techniques, H. Applied sustainability techniques.

## Usage

Survey\_ESIP\_2021

## Format

A tibble with 4003 rows and 263 variables:

record

Record number

HIDCOUNTRY

HIDDEN holds the country

A1

What is your gender?

A2

How old are you?

HIDAGE

HIDDEN hold the age recode

A3

What is your education level?

A3r6oe

What is your education level? - Other professional qualification

A4

What is your average monthly household income after tax, when calculated per adult? This includes all forms of income (wages, rents, dividends, social transfers, etc.).

A5

How much do your household save, when calculated per month and per adult? It includes retirement savings but excludes real estate loan payments.

A6

What is approximately the total amount of accumulated financial savings of your household (without considering debts), when calculated per adult? It may include bank accounts, savings accounts, private pension, life insurance, investments in mutual funds, etc.

A7r1

I am interested in topics around investments, saving money or the stock exchange.

A7r2

I am interested in sustainable finance solutions.

A9

Are any of your current financial investments in sustainable products?

A10

In the following graph you can see the potential gains (in green) and the potential losses (in red) over a period of 3 years for different investment strategies. Losses and gains occur equally often. rel A10\_img.png

A11r1

Generate a precautionary buffer to be used in case of problem

A11r2

Save for retirement

A11r3

Generate a long-term increase in wealth that could eventually be bequeathed to my children

A11r4

Generate additional income

A11r5

Save money for personal projects

A11r6

Save money for children or relatives

A11r7

Any other objective

A11bis

You mentioned other financial objectives, could you please detail what are these objectives?

HIDPROFILr1

1 – Low level of interest

HIDPROFILr2

2 – Medium level of interest

HIDPROFILr3

3 – High level of interest

A12

This survey has a short and a longer route. The short route will require another 10 minutes while the longer route is about 20 to 25 minutes. Based on your previous answers, you would be suitable to take the longer version. This would help us gather more qualitative data and make you learn more too. Previous participants were happy about this opportunity to learn more about sustainable finance. They could use their improved knowledge for their personal finance decisions. Do you want to take the longer route and answer the additional questions?

HIDROUTEr1

1 – Short route

HIDROUTEr2

2 – Long route

BVIDEO\_DEplay\_count

Play Count

BVIDEO\_DEtime\_elapsed

Elapsed Time

BVIDEO\_GRplay\_count

Play Count

BVIDEO\_GRtime\_elapsed

Elapsed Time

BVIDEO\_EEplay\_count

Play Count

BVIDEO\_EEtime\_elapsed

Elapsed Time

BVIDEO\_IEplay\_count

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BVIDEO\_Ietime\_elapsed

Elapsed Time

BVIDEO\_ROplay\_count

Play Count

BVIDEO\_ROtime\_elapsed

Elapsed Time

BVIDEO\_DKplay\_count

Play Count

BVIDEO\_DKtime\_elapsed

Elapsed Time

B1r1

I believe that financial investments are an appropriate way to express one's values

B1r2

I believe that financial investments in general are effective to change the world

B1r3

I believe that my own financial investments, whatever their actual amount, can make a difference.

pos\_1\_LFr1

Generate a precautionary buffer to be used in case of problem

pos\_1\_LFr2

Save for retirement

pos\_1\_LFr3

Generate a long-term increase in wealth that could eventually be bequeathed to my children

pos\_1\_LFr4

Generate additional income

pos\_1\_LFr5

Save money for personal projects

pos\_1\_LFr6

Save money for children or relatives

pos\_1\_LFr7

Any other objective

pos\_1\_LF\_selectedr1

Generate a precautionary buffer to be used in case of problem

pos\_1\_LF\_selectedr2

Save for retirement

pos\_1\_LF\_selectedr3

Generate a long-term increase in wealth that could eventually be bequeathed to my children

pos\_1\_LF\_selectedr4

Generate additional income

pos\_1\_LF\_selectedr5

Save money for personal projects

pos\_1\_LF\_selectedr6

Save money for children or relatives

pos\_1\_LF\_selectedr7

Any other objective

pos\_2\_LFr1

Generate a precautionary buffer to be used in case of problem

pos\_2\_LFr2

Save for retirement

pos\_2\_LFr3

Generate a long-term increase in wealth that could eventually be bequeathed to my children

pos\_2\_LFr4

Generate additional income

pos\_2\_LFr5

Save money for personal projects

pos\_2\_LFr6

Save money for children or relatives

pos\_2\_LFr7

Any other objective

pos\_2\_LF\_selectedr1

Generate a precautionary buffer to be used in case of problem

pos\_2\_LF\_selectedr2

Save for retirement

pos\_2\_LF\_selectedr3

Generate a long-term increase in wealth that could eventually be bequeathed to my children

pos\_2\_LF\_selectedr4

Generate additional income

pos\_2\_LF\_selectedr5

Save money for personal projects

pos\_2\_LF\_selectedr6

Save money for children or relatives

pos\_2\_LF\_selectedr7

Any other objective

pos\_3\_LFr1

Generate a precautionary buffer to be used in case of problem

pos\_3\_LFr2

Save for retirement

pos\_3\_LFr3

Generate a long-term increase in wealth that could eventually be bequeathed to my children

pos\_3\_LFr4

Generate additional income

pos\_3\_LFr5

Save money for personal projects

pos\_3\_LFr6

Save money for children or relatives

pos\_3\_LFr7

Any other objective

pos\_3\_LF\_selected

HIDDEN least fill for 1 position - selected

hid\_c1r1

Generate a precautionary buffer to be used in case of problem

hid\_c1r2

Save for retirement

hid\_c1r3

Generate a long-term increase in wealth that could eventually be bequeathed to my children

hid\_c1r4

Generate additional income

hid\_c1r5

Save money for personal projects

hid\_c1r6

Save money for children or relatives

hid\_c1r7

Any other objective

C1\_1r1

...to align your savings with your personal values

C1\_1r2

...to use your savings to have a clear positive impact on the society or the environment

C1\_1r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

C2\_1r1

...to align your savings with your personal values

C2\_1r2

...to use your savings to have a clear positive impact on the society or the environment

C2\_1r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

C1\_2r1

...to align your savings with your personal values

C1\_2r2

...to use your savings to have a clear positive impact on the society or the environment

C1\_2r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

C2\_2r1

...to align your savings with your personal values

C2\_2r2

...to use your savings to have a clear positive impact on the society or the environment

C2\_2r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

C1\_3r1

...to align your savings with your personal values

C1\_3r2

...to use your savings to have a clear positive impact on the society or the environment

C1\_3r3

...that your savings achieve the maximum possible return for the level of risk you accept to take



C2\_3r1

...to align your savings with your personal values

C2\_3r2

...to use your savings to have a clear positive impact on the society or the environment

C2\_3r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

C1\_4r1

...to align your savings with your personal values

C1\_4r2

...to use your savings to have a clear positive impact on the society or the environment

C1\_4r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

C2\_4r1

...to align your savings with your personal values

C2\_4r2

...to use your savings to have a clear positive impact on the society or the environment

C2\_4r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

C1\_5r1

...to align your savings with your personal values

C1\_5r2

...to use your savings to have a clear positive impact on the society or the environment

C1\_5r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

C2\_5r1

...to align your savings with your personal values

C2\_5r2

...to use your savings to have a clear positive impact on the society or the environment

C2\_5r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

C1\_6r1

...to align your savings with your personal values

C1\_6r2

...to use your savings to have a clear positive impact on the society or the environment

C1\_6r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

C2\_6r1

...to align your savings with your personal values

C2\_6r2

...to use your savings to have a clear positive impact on the society or the environment

C2\_6r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

C1\_7r1

...to align your savings with your personal values

C1\_7r2

...to use your savings to have a clear positive impact on the society or the environment

C1\_7r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

C2\_7r1

...to align your savings with your personal values

C2\_7r2

...to use your savings to have a clear positive impact on the society or the environment

C2\_7r3

...that your savings achieve the maximum possible return for the level of risk you accept to take

D1r1

Climate change

D1r2

Fossil fuels

D1r3

Renewable energy and energy efficiency

D1r4

Nuclear power

D1r5

Biodiversity

D1r6

Pollution

D1r7

Natural resources

D1r8

Clean water

D1r9

Sustainable forestry

D1r10

Genetically Modified Organisms

D1r11

Human rights

D1r12

Education

D1r13

Health and safety

D1r14

Gender equality

D1r15

Diversity

D1r16

Labor rights

D1r17

Social inequalities

D1r18

Poverty, malnutrition, basic needs

D1r19

Corruption and fraud

D1r20

Local employment

D1r21

Abortion and contraception

D1r22

Alcohol

D1r23

Tobacco

D1r24

Cannabis

D1r25

Sugar

D1r26

Gambling

D1r27

Pornography

D1r28

Weapons

D1r29

Veganism and animal well-being

D1r30

Pork, beef and other religious dietary restrictions

E1

Please continue the following sentence. I believe that, in general, introducing sustainability factors into an investment strategy...

hid\_E2r1

HIDDEN should we ask E2 ?

E2\_time\_before

HIDDEN time spent marker for E2

E2

Let's consider you own a diversified financial portfolio (made of bonds and stocks). Such a portfolio yields a typical annual return of 4%. Would you accept to give up a fraction of that return to have your savings fully reflect your sustainability objectives? In the slider below, please indicate the minimum annual return you would accept for your savings if you can be sure your sustainability objectives will be fully met. To help you choose, the slider shows the total compounded return you would get over 10 years for each level of annual return

E2\_time

HIDDEN time spent on E2

hid\_E3r1

HIDDEN should we ask E3 ?

E3r1

It really helps sustainable companies to grow and deliver more positive impact

E3r2

Managing sustainable financial products the way I want really implies giving up some return opportunities

E3r3

Managing sustainable financial products the way I want really implies higher costs for financial intermediates

F1r1

SMEs (less than 250 employees)

F1r2

Large corporations (more than 250 employees)

F1r3

Households

F1r4

Municipalities, local or regional public administrations

F1r5

National public administrations

F2r1

In your city or region

F2r2

In your country

F2r3

In other European countries

F2r4

In other developed countries

F2r5

In other emerging countries

F3r1

A green saving account as an alternative to the classical saving account. Deposits to the green saving account are used by the bank to provide green loans to households and companies, which are loans that finance projects with clear environmental benefits (i.e., loans for buying energy-efficiency devices or to develop small-scale renewable energy projects).

F3r2

A green bond fund as an alternative to the classical bond fund. In both cases, the funds buy bonds issued by large European companies from all sectors. The only difference is that the green bond fund specializes in buying "green bonds" that specifically finance environmental

projects that are verified by external auditors, especially investments in energy-efficiency and renewable energy.

F3r3

A low-carbon equity fund as an alternative to the classical equity fund. In both cases, the funds buy stocks of large European companies from all sectors. The only difference is that the low-carbon equity fund selects companies that are aligned with the objective of maintaining the global temperature increase to below 2°C. In practice, the fund selects companies that have the lowest carbon intensities of their sectors and put an extra weight of companies providing low-carbon solutions, especially in renewable energy and energy efficiency.

F3r4

A green energy equity fund as a new sector fund. The fund only buys stocks of listed European companies operating in the sectors of renewable energy and energy efficiency.

F7

Please rate how interested you are to invest part of your future savings in stocks or loans to small companies in the renewable energy or energy efficiency sectors through crowdfunding platforms (instead of investing in larger companies through the stock market)

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Play Count

GVIDEO\_DEtime\_elapsed

Elapsed Time

GVIDEO\_GRplay\_count

Play Count

GVIDEO\_GRtime\_elapsed

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GVIDEO\_EEplay\_count

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GVIDEO\_IEplay\_count

Play Count

GVIDEO\_IEmtime\_elapsed

Elapsed Time

GVIDEO\_ROplay\_count

Play Count

GVIDEO\_ROtime\_elapsed

Elapsed Time

GVIDEO\_DKplay\_count

Play Count

GVIDEO\_DKtime\_elapsed

Elapsed Time

G1

Exclusion You have previously expressed a will to have your values be reflected in your savings / have your savings actively contribute to make a change. It is possible to find financial products that exclude from their investment scope firms involved in certain controversial activities. In practice, it means the investment universe from which the portfolio manager can choose investments will be restrained to companies that are NOT involved in the selected controversial activities. In order to meet the sustainability objective(s) you expressed, would you be interested in investing in financial products that include such a mechanism?

G2

Thematic Investment You have previously expressed a will to have your values be reflected in your savings / have your savings actively contribute to make a change. It is possible to invest in financial products that specifically select companies from sectors that provide solutions to specific environmental or social issues. In practice, it means that the investment universe from which the portfolio manager can choose investments will be restrained to companies involved in the selected topic only. In order to meet the sustainability objective(s) you expressed, would you be interested in investing in financial products that include such a mechanism?

G3

Best-in-Class You have previously expressed a will to have your values be reflected in your savings / have your savings actively contribute to make a change. It is possible to invest in financial products that specifically select companies that are the best of their industry sectors regarding environmental, social and governance issues. In practice, it means that the investment universe from which the portfolio manager can choose investments will be restrained to companies with high ESG (environmental, social, governance) ratings. In order to meet the sustainability objective(s) you expressed, would you be interested in investing in financial products that include such a mechanism?

G4

Impact investing You have previously expressed a will to have your values be reflected in your savings / have your savings actively contribute to make a change. It is possible to find investment funds that select their investments based on the probable impact they would have on the environment or the society. To do so, they run a careful analysis of the impact of the companies and of the additional effect of providing capital to those companies. In practice, it means that the investment universe from which the portfolio manager can choose investments will be restrained to companies with high impact potential only. In order to meet the



sustainability objective(s) you expressed, would you be interested in investing in financial products that include such a mechanism?

G5

Engagement You have previously expressed a will to have your values be reflected in your savings / have your savings actively contribute to make a change. It is possible to find investment funds that actively engage with companies (through a constant dialogue or through exercising their voting rights during shareholders' general assemblies) to make the companies change their business practices and model. In practice, it means the investment universe of the portfolio would be unchanged but the portfolio manager would get into an active dialogue with certain or all companies invested. In order to meet the sustainability objective(s) you expressed, would you be interested in investing in financial products that include such a mechanism?

G6

Profit Sharing You have previously expressed a will to have your values be reflected in your savings / have your savings actively contribute to make a change. It is possible to find financial products that donate part of the investor revenues to NGOs, charities or social enterprises serving specific social or environmental causes. In practice, it means that the composition of the portfolio would not change but part of the returns would be donated. In order to meet the sustainability objective(s) you expressed, would you be interested in investing in financial products that include such a mechanism?

H1r1

Oil

H1r2

Gas

H1r3

Coal

H1r4

Nuclear energy

H1r5

Palm oil

H1r6

Genetically modified organisms

H1r7

Pesticides and biocides

H1r8

Animal food

H1r9

Animal testing

H1r10

Environmental standards violations in the supply chain

H2r1

Human rights violations in the supply chain

H2r2

Labour rights violations in the supply chain

H2r3

Violation of the United Nations Global Compact principles (UN principles on human rights, labour, environment and ant-corruption)

H2r4

Companies without women in the management

H2r5

Non-disclosure of directors' salaries

H2r6

Controversies in the field of corruption

H2r7

Tax avoidance strategies and identified infringements

H2r8

Anti-Competitive Behaviour

H2r9

Accounting fraud

H3r1

Abortion

H3r2

Contraceptives

H3r3

Stem cells

H3r4

Tobacco

H3r5

Alcohol

H3r6

Cannabis

H3r7

Sugar

H3r8

Pork, beef and other religious dietary restrictions

H3r9

Gambling

H3r10

Pornography

H3r11

Sex / violence in medias

H3r12

Weapons

H4r1

Renewable energy

H4r2

Energy efficiency

H4r3

Resource efficiency

H4r4

Pollution reduction

H4r5

Clean water

H4r6

Sustainable forestry

H4r7

Animal well-being

H4r8

Child care and education

H4r9

Health

H4r10

Nutrition

H4r11

Poverty reduction and basic needs

H4r12

Old-age care

H5

Best-in-class You have expressed an interest in financial products implementing a best-in-class screening. On which ESG criteria, would you like financial products to implement a best-in-class screening?

H6r1

Reduce poverty

H6r2

Reduce hunger

H6r3

Promote health

H6r4

Promote education

H6r5

Promote gender equality

H6r6

Promote clean drinking water and sanitation worldwide

H6r7

Promote renewable energy

H6r8

Promote sustainable economic growth and decent work

H6r9

Promote sustainable infrastructure and innovation

H6r10

Reduce inequality

H6r11

Promote sustainable construction and refurbishment

H6r12

Promote sustainable products

H6r13

Promote climate protection

H6r14

Improve water quality and fish stocks

H6r15

Improve nature conservation and biodiversity

H6r16

Promote peace, justice, and the strong institutions

H6r17

Promote partnerships for sustainable development

H7

Impact investing Aside of the issues mentioned in the last question, are there additional sustainability issues for which you would like your savings to try to make a clear difference?

uuid

Participant identifier

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[Package *Data.2DII* version 0.0.0.9000 [Index](#)]