

Name	Description
Identifier	Mystery_EEI_2023
Title	Mystery shopping campaign Level EEI 2023
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 2 hypothetical investor profiles to the mystery shoppers including. 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	2023
Geographic coverage	Italy, Spain and The Netherlands + 8 visits for Sweden
Type of data	Feedback Form
Number of observations	98
Data collection company	Bare International
Data collection method	In-person interview + a few online interviews
Sample	<p>2 different profiles of mystery shoppers interested in investing in sustainable products :</p> <ul style="list-style-type: none"> - one asking for a minimum proportion of 100% to be invested in environmental sustainable investments - one asking to invest in a way that generates positive impact
Language	English
Variables	See "name variables" on Tables_Excel/Documentation
Data format	xlsx, R file
Related publications	https://2degrees-investing.org/resource/moving-the-blockers-of-retail-sustainable-finance/
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