



**THE**  **DROP**  
BAMM

# THE VALUE CRISIS

Consumers' search for value in a world of rising prices and falling quality

# Our Panelists



**Cherie Leonard**

Senior Director  
Head of North America  
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**Tina Tonielli**

US and North American  
Lead  
Consumer and  
Business Insights and  
Analytics



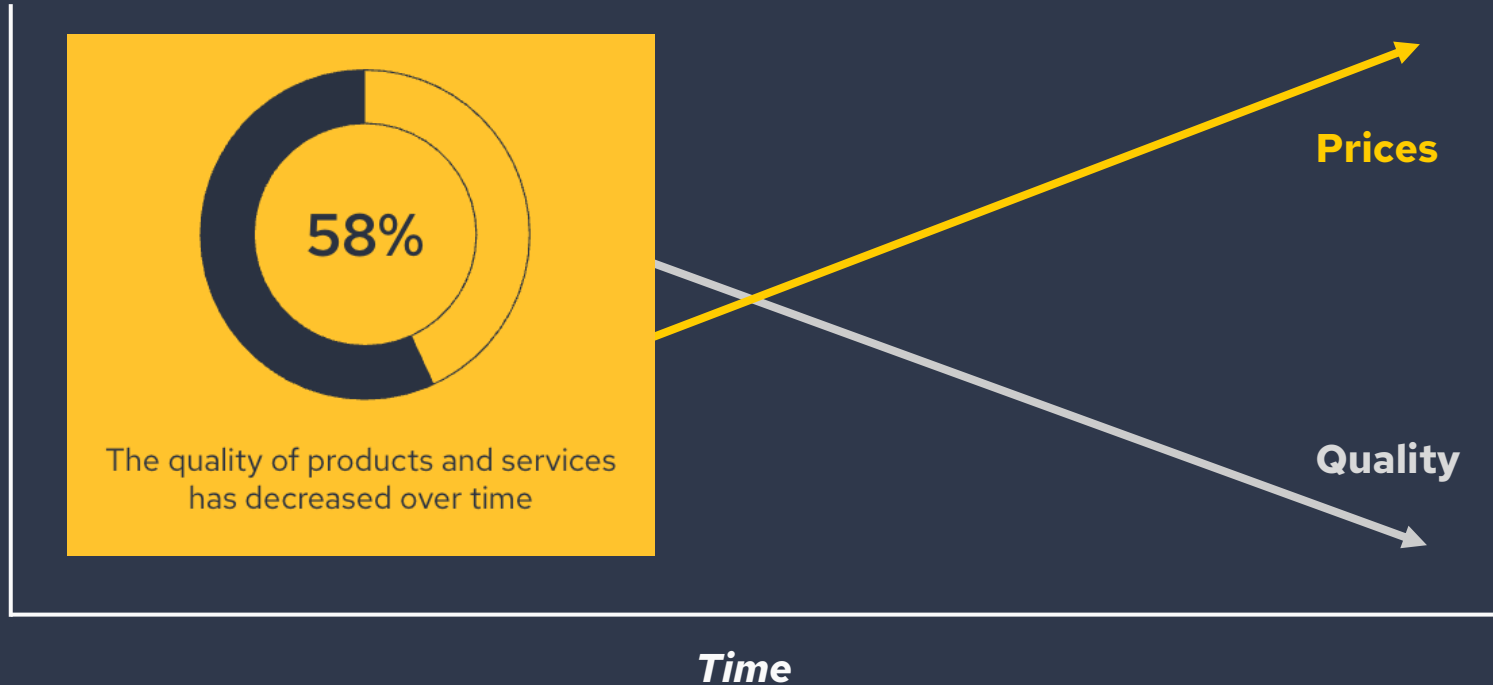
Pernod Ricard

**Natalie Accari**

Division Vice President  
GM Convenience &  
RTD



# The Value Crisis: The connection between quality and a fair price is drifting apart



# Value Insight Exploration



## Culture scrape

Narrative analysis  
50+ sources  
Current cultural  
context of value



## Expert interviews

10 x 30 minute interviews  
with key industry leaders  
across sectors  
*How they define value in  
their fields*  
*Most pressing questions  
they're facing*

## BAMM ethnography

n=70

US, UK, Canada & India  
Online diaries & focus groups  
Ages 18-65  
Mix of family makeup,  
income level, attitudes  
towards money, and  
demographics

US n=20, UK n=20,  
IND n=20, CAN n=10



## BAMM survey

US & UK  
800 respondents total  
Age 16+  
10 min survey  
Advanced analytics:  
*Factor Analysis*  
*Correspondence mapping*





#1.

# Loud Budgeting



# We are talking about money more than ever



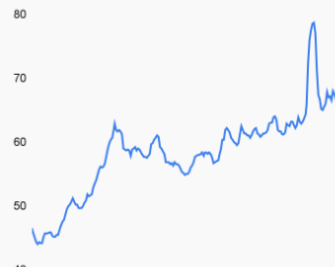
*"Loud budgeting: terminology for when you don't want to spend money..."*

*...one that doesn't make talking about money awkward."*

**Lukas Battle, TikTok**



Google Searches for "Money"  
(worldwide, indexed)



**Robinhood**

INTERVIEW

## Meet the 'girly' influencer who tells me how women can get rich

Vivian Tu has amassed millions of followers on TikTok and Instagram by giving 'girl-coded', easily digestible financial tips. Her best investment? Her husband



**Splitwise**



# 45%

18-24 year olds talk about money with their friends more than they used to

49%

***So we can save money together***

43%

***To encourage financial awareness among my friends***

43%

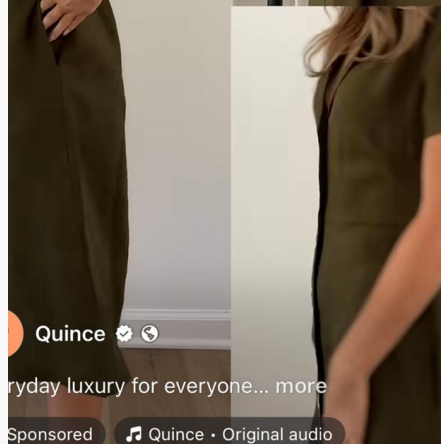
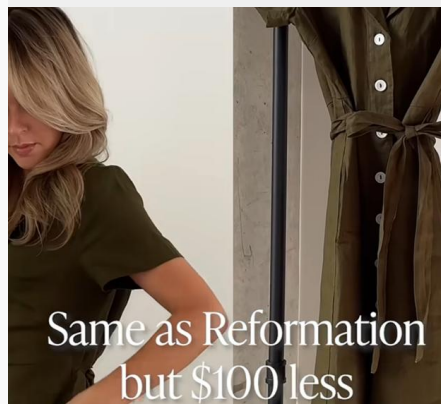
***I feel proud talking about money***





Unapologetic  
joy is being  
uncovered  
with hacks,  
old and new

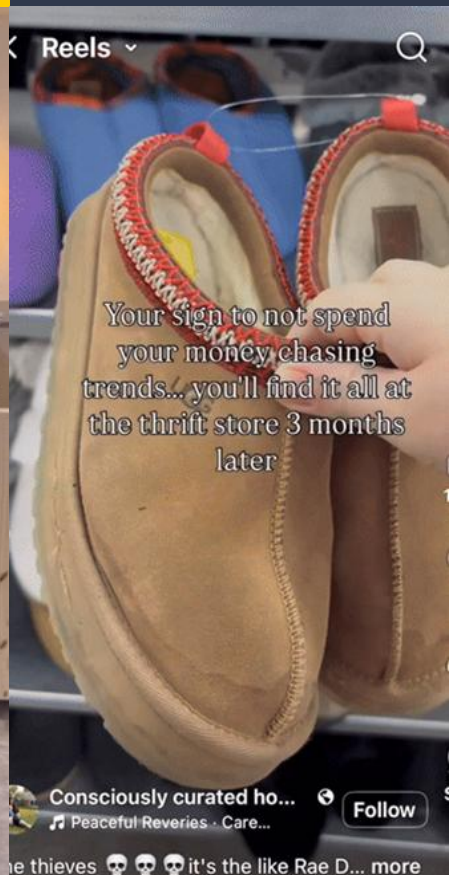
## DUPES



## DIY EVERYTHING



## FASHION THRIFTING





# #2. Decoding Value



# The 6 Value Pillars



## Purpose & Fit

*Is high quality, fits my needs, lasts a long time, well designed, and solves a problem*



## Fair Price

*Is a fair and consistent price*



## Ease

*Removes hassle from my life, saves me time, easy to use, and removes mental load*



## Gives Me Savings

*Gives me long-term savings that I feel good about, shows I'm responsible with money*



## Brings Me Delight

*Brings me joy, makes me feel good, and is better than expected*

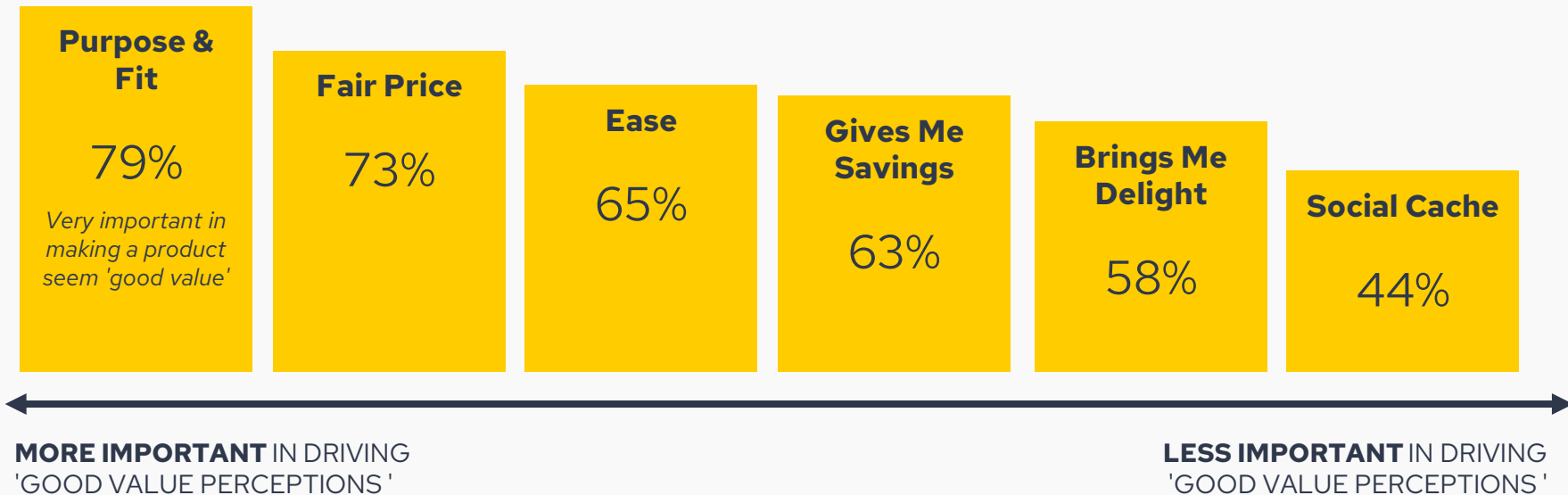


## Social Cache

*Makes me feel cool, brings people together, helps me stand out from the crowd*



# Unsurprisingly, quality & price are top priorities, even though they are harder to assess



Built using Factor analysis on 45 value statements

Q. How important are each of the following in making a product or service seem 'good value' to you personally?



# Thank You

