



Consumer Behaviour in times of crisis

A qualitative research at scale
in France, Germany and the UK

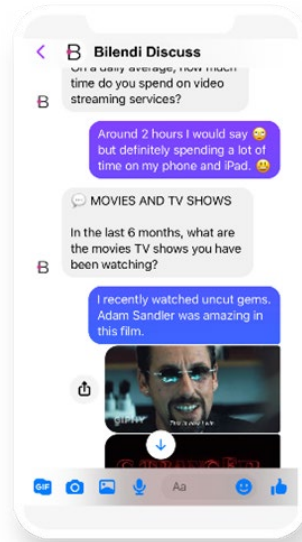
Introduction

We've run a two-week-long demo research on Bilendi Discuss about shopping behaviour in times of crisis. We would like to share with you some final facts and thoughts.

During two weeks in February 2023, we invited our clients to join us for an interactive journey into consumer behaviour in times of crisis: they could share their questions with us, and we asked them to the participants.

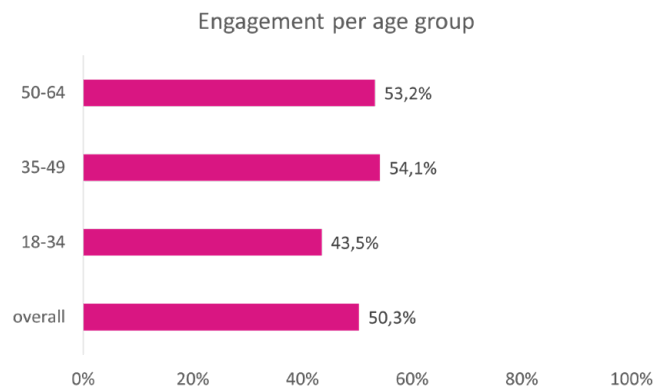
We recruited a national representative sample of 600 people in the UK, France and in Germany and asked them questions about their shopping habits using #BilendiDiscuss - our innovative qual at scale research tool.

Bilendi Discuss enables our clients and us to interact with consumers directly via their natural messaging channels to generate instant insights and data through online, large-scale, personalised conversations.



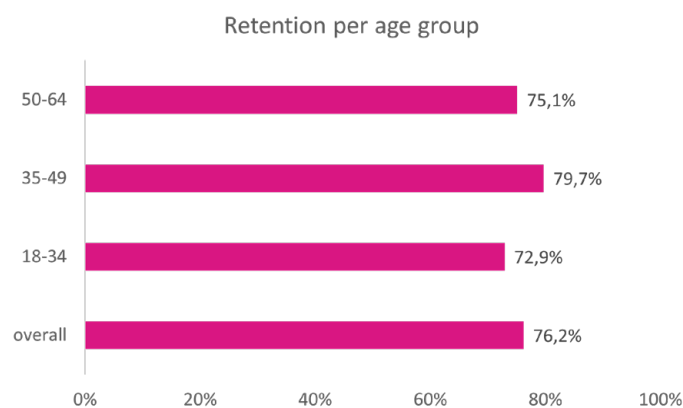
Engagement of participants

First, in terms of engagement: we invited a total of 1.185 panel members to participate in this research (roughly 400 per country). Out of those, 596 joined the demo, which amounts to an overall engagement rate slightly higher than 50%. As might be expected, the rate is lower amongst younger folks (engagement is down to 43.5% among ages 18 to 34) but is not that much lower considering how challenging it usually is to engage this age group.



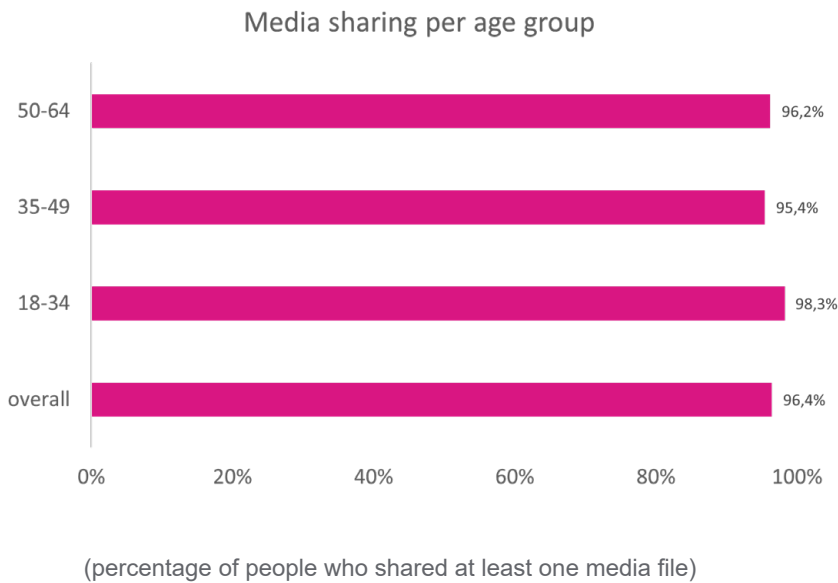
(engagement: percentage of invited panel members who logged in to join the project)

Now, what is crucial to researchers is not just the engagement rate, which might be relatively easy to factor in at the recruitment phase, but also the ability to retain participants over the whole course of the research. So what about the retention rate: among those who joined, how many answered all questions we pushed through their messaging app? Admittedly, our project was rather demanding, with 2 to 5 questions being pushed every day around 5pm over 14 consecutive days (except on week-ends, participants only had one or two tasks to accomplish over Saturday and Sunday). Here are the results, broken out by age group.



Retention thus proved quite high, with about three quarters of participants remaining committed till the very end of the study. Interestingly, retention is only 4 points down in the 18 to 34 age group.

Over the study, we encouraged the participants to share media with us, such as photos connected to their daily shopping habits or voice and video messages. This was by no means mandatory, since participants who did not do so were not kicked out of the group. Sending a photo or a voice message over WhatsApp or Messenger is very easy: this translated into almost all participants sharing at least one photo or one other media file with us, and we received a total of 1.955 media files (thankfully, Bilendi Discuss includes automated transcription of audio and video files as well as automated tagging of all content, including photos). Here are the detailed figures, overall and per age group:



When it comes to sending photos, voice messages and video messages, younger people are not any more reluctant: they were actually a little bit more likely to do this over the study (98.3% of people under 35 did send us such materials, +1.9pts compared to the full sample).

But of course, qualitative research, even when done at scale, is not just about numbers. What really matters is the ability of the research design to generate true-to-life moments and reports that will prove to be valuable sources of insights. But this is for you to judge! The results of the project include many quant and qual items in connection with the new constraints that weigh upon shopping and consumption (inflation, product scarcity, climate crisis, concern for health and well-being, etc.) that might well be worth digging into. Do not hesitate to get in touch with our teams if you would like to know more about Bilendi Discuss. Try it on your own and discover not only the complete results of the study, but also how easy it is to conduct qual at scale research!

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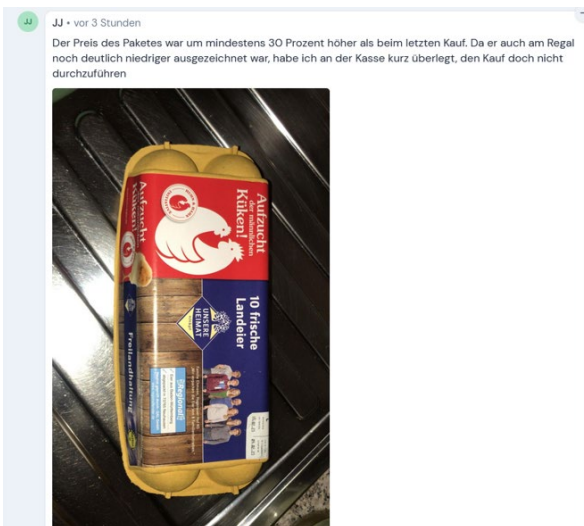
The first days of our project: “No matter how cute it looks”

Once we started our journey, over the weekend, our participants were on their first mission – we asked them if they hesitated buying something, and if so, what. No surprise, inflation does take its toll.



In the UK, Adz, a 21 male who told us he enjoys grocery shopping, which is almost “like an extra activity” to him, decided not to buy this caterpillar cake: no matter how cute it looks, for Adz, the price is *“not worth the quality”*.

What was striking to us is how much those concerns extended to the everyday, turning into conscious choices that used to be quite automatic. In Germany, JJ, though a 52 male with a per capita household income over 2,000 euros per month, considered not buying eggs when he realised the price had increased:



“The price of the package was at least 30 percent higher than the last time I bought it. Since it was also marked significantly lower on the shelf, I briefly considered at the check-out not to make the purchase after all.”

And in general, lots of consumers implied that inflation is spoiling the fun of shopping. BoisK-NL, a 52-year-old French male who had declared to us being strongly concerned about inflation says he misses the times when he could go for some extras instead of carefully sticking to his shopping list:

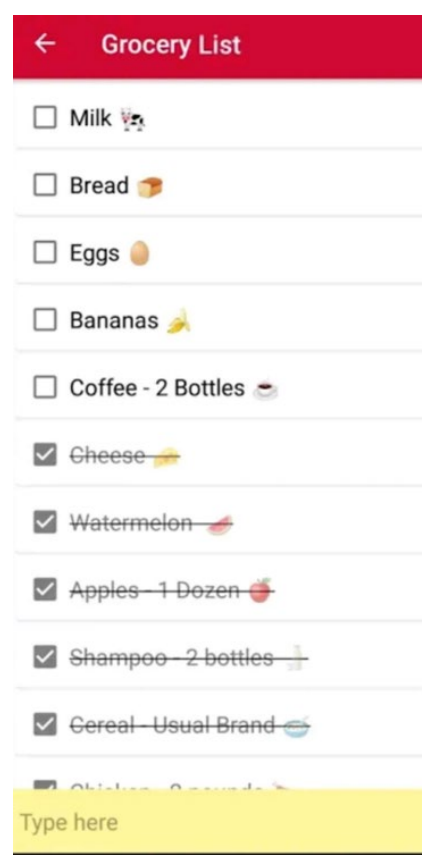
“Like to do shopping... I'd say it's a question of necessity. It can be fun to browse the promotions, but right now I keep myself strictly to my list. I'd say that I like shopping less now than before, when we could allow ourselves a little deviation from the budget. Now, knowing that everything is still increasing in price, I prefer to remain prudent and not go beyond my budgeted spending. Which brings me back to the idea that I don't enjoy shopping as much as before.”

2 “I am planning meals before going to the store”

Following up on our first insights about the inflation toll, we decided to dig a little deeper and ask our participants how they personally dealt with the situation.

Bulk shopping, chasing for coupons, and cutting on unnecessary expenses were all common paths of action for our shoppers to keep their bills down. But there is more. Remember our participant Adz from the UK, we mentioned above: our caterpillar candy person? Here are his personal tactics:

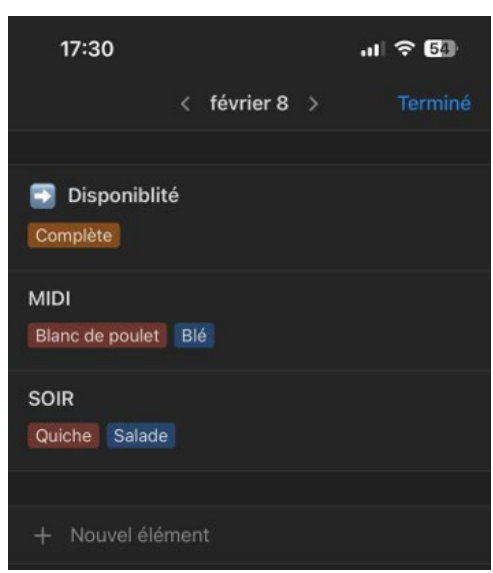
“Creating a budget and making a shopping list, when items are on offer or discounted I buy 2 of them rather than 1 and more importantly shop after eating not the other way round as this allows me to buy important stuff and think long term rather than short term and pick up useless high sugar or unhealthy processed foods.”



Beyond the anecdote itself, lots of our participants devised their own strategies to keep their shopping under conscious control. Here is what FrauSam, a 32 y.o. woman in Germany told us :

“I shop more consciously and, above all, plan my purchases. Since I've been ordering from the Rewe delivery service, I pay more attention to what I really need and save myself from spontaneous shopping sprees.”

That’s rather striking: even though the Rewe delivery service most often comes at an extra price, FrauSam uses it as an opportunity to save money by better controlling what she buys. Maybe this will give a new relevance to delivery?



And in France, Manon, who is 23, told us how using Notion, the note-taking app, helped her planning family meals, making sure they buy only what they need: *“I am planning meals before going to the store so that I buy only what we really need”.*

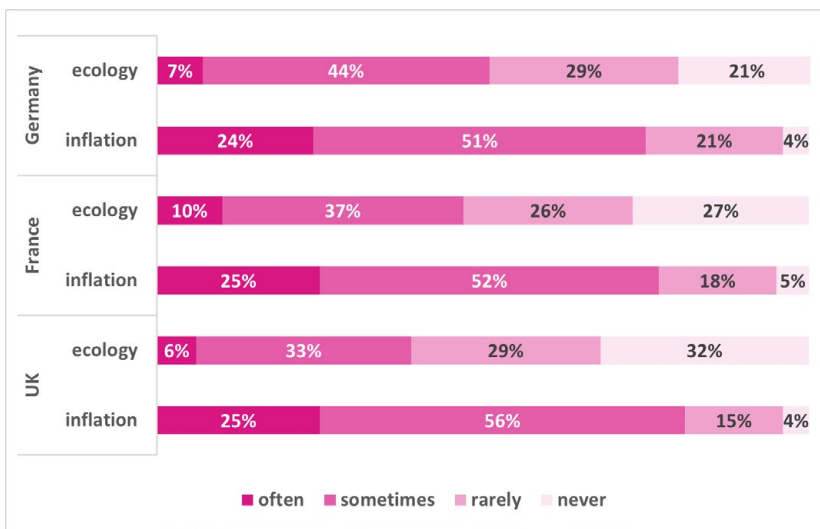
We were observing that inflation had had a “fun-killing” effect on shopping. But maybe this is not just about cutting back on candies though. Is “controlled shopping” the new trend?

3 “Buy well, save the planet”

In our dire times, inflation is certainly not the only concern that might affect shoppers' minds and make them think twice before putting something in their carts. We began asking our participants about ecological concerns and their impact on their daily shopping habits.

We were wondering whether ecology could actually be a reason *not* to buy certain things, in the same way that inflation can be. Bilendi Discuss allows us to push closed questions to participants and to gather quantitative results based on our 'qual at scale' samples. We had previously asked our participants how often they chose not to buy something that they would have purchased before, because of inflation. And we decided now to ask them the same question, replacing 'inflation' with 'ecological concerns'. In both cases, they had to select one option among 'often', 'sometimes', 'rarely' and 'never'.

Here are the results we obtained:



We had 179 (inflation) and 177 (ecology) respondents in Germany, 168 and 165 in France and 176 and 172 in the UK.

The results are rather telling, and in that respect similar in all three countries: global inflation is much more of a hindrance than global warming when it comes to shopping without a second thought.

However, one may wish to see the glass as half-full rather than half-empty: it is still the case that in all three countries, about half of our participants (a bit less in the UK) do have second thoughts when it comes to buying common goods in connection with ecological concerns. As Themathsguru (44 y.o. male living in the UK) reminded us “*Buy well, save the Planet!*”.



Pictures our participants have taken to illustrate their answers

4 “I feel a bit powerless”

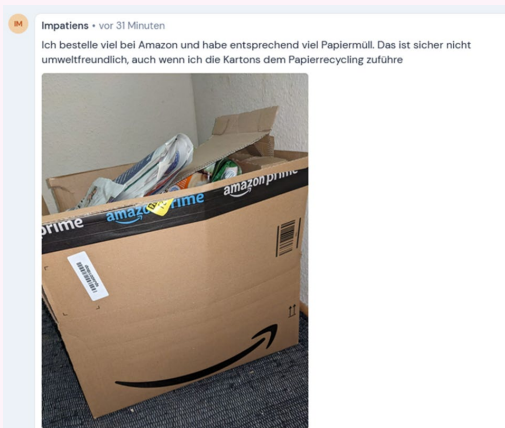
We decided to follow up on these quantitative results and to dig deeper into the ecological mind of consumers regarding the impact of ecological concerns with a qualitative view of these sensitive matters. We asked our participants in greater detail what they did (or did not do) for the environment in connection with their shopping habits, and how they felt about the issue.

What came out of it? Well, surprise or not, we are creatures of contradiction. Of course, some considered themselves ecological angels and some others consistently refuse to serve a cause in which they don't believe. But most showed signs of environmental goodwill, while admitting to their inability to get rid of habits they themselves disapproved of.



Packaging and plastic, supermarket bags and Amazon cardboards often came up in the discussion. Grantelbart, a 24 y.o. male in Germany, showed us his up-cycled reusable shopping bag as a proof of his concern: But at the same time, he confessed to buying plastic figurines he did not really need.

At the individual level, people shared their ways to deal with those contradictions. This was the case of Impatiens, a 45 y.o. woman in Germany who is mindful of recycling the numerous boxes that her Amazon orders result in:



“I order a lot from Amazon and accordingly, I have a lot of paper waste. That's certainly not environmentally-friendly, even if I do recycle the boxes.”

But they also often expressed a sense of helplessness due to the difficulty of dealing with personal contradictions compounded by a feeling that the solution is not in one's hands. Leonard, a 51 French male, thus wrote us the following:

“I feel a bit powerless, I do try to limit my own environmental footprint, but without a clear international political willingness to act, things won't end well.”

One should certainly therefore qualify the “price vs. ecology” picture of consumer behaviour. Hindrances to changes in behaviour certainly go deeper than concerns about costs: we are at the same time striving to handle our contradictions and to overcome fatalistic courses of (in)action.

5

“Going for a walk costs nothing”

Finally, to end on a lighter note, we asked our participants about their leisure activities, both in and of themselves and in connection with concerns about inflation and the environment that we had discussed earlier.

Not so surprisingly, leisure activities tend to be seen as belonging to the category of superfluous expenses that may be cut back when needed. Themathsguru, the 44-year-old man living in the UK thus told us:

“I don’t see live music as much as I used to. I have reduced the range of places I go out to eat on the basis of cost. I have also, on the basis of costs, reduced or deferred indefinitely some things I would do with my friends. E.g. a weekend away with my friends to see a show or drive classic cars.”

By contrast, flight shame, for example, did not really appear as a trend, because for those who fly for their holidays, there usually is no perceived alternative, changing destinations not really being perceived as an alternative. This 58-year-old man in France thus told us that flying was just the only option to go where he wanted to go:

“Hard to talk about ecology in connection with my holidays, I have to take a plane! I travel less in France than I used, but when possible, I’d take a train rather than use my personal car, if the transportation system at my final destination is sufficiently developed.”



But we did see some trends in terms of outdoor activities, including the simplest ones such as going for a walk with friends in a forest – those are just at the right intersection of price control and ecology! As Siso, a 43-year-old German woman reminded us:

“Going for a walk costs nothing and does not pollute the environment. It’s also relaxing. And I get exercise.”

This leads us once again beyond the “price vs ecology” picture of consumer choice: new lifestyles based on habits that are both money-savvy and planet-friendly may be the forthcoming trends!

The aim of this Bilendi Discuss Demo platform was not to do a research report but just to show what kind of research can be run and the quality of the outputs.

Subsequently, you’re welcome to request an access to our Bilendi Discuss platform, where you can see and analyse the posts and materials yourself.

Do not hesitate to get in touch with our teams if you would like to get access to the demo version or know more about Bilendi Discuss!

About Bilendi

Bilendi Services for Market Research helps market researchers to collect data by reaching and engaging even the most challenging targets in Europe.

We combine innovative solutions with proprietary technologies to gather and deliver your data exactly when and how you need it. We provide data, technology and services which allow market researchers to collect and interpret insight: Translation, scripting, sampling, quality checks, coding, data processing as well as our multichannel conversational and analytic platform Bilendi Discuss.

Why Bilendi

From Sample Only to Full Service

We provide data, technology and services which allow market researchers to collect and interpret insights: translation, scripting, sampling, quality checks, coding, data processing, Bilendi Discuss online qualitative platform.

Dedicated and flexible local teams

We have dedicated and flexible operations teams based in 13 offices across Europe.

A unique partner for your qualitative, quantitative or hybrid approaches

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