

THE CONTEXT ADVANTAGE: WINNING THE MOMENTS THAT MATTER

How Contextual Brand Equity reveals
hidden growth opportunities



Imagine visiting a new city armed only with TripAdvisor's top ten attractions. You'd see the highlights, check the boxes, post the photos. But you'd miss the tucked-away restaurant where locals gather, the morning market that captures the city's soul, the neighbourhood where culture actually lives. You'd leave satisfied but somehow unfulfilled, having seen everything yet experienced nothing.

This is how most brands track their performance today.

From traditional to Contextual Brand Tracking: go beyond the KPIs

Traditional brand tracking is the TripAdvisor list — measuring awareness, consideration, usage, important metrics, essential checkpoints. But while brands celebrate their position on these lists, Contextual Brand Tracking reveals a story unfolding in the streets below.



At Ipsos, we've discovered that successful brands aren't just the ones ranking highest on traditional metrics. They're the ones that understand a fundamental truth: **context changes everything**. A brand that is average in aggregate might be excelling in specific moments. A market leader might be one strategic move away from disruption. And sometimes, your biggest opportunity isn't in your category at all.



TL;DR



Uncover the unexpected

Adding a context focus on Brand Tracking reveals opportunities and threats invisible to traditional measurement — from brands winning outside their core to success masking decline.



Context changes everything

Brands compete with different categories moment by moment. Your snack bar rivals yogurt at lunch but savoury snacks in the afternoon. Your pain reliever faces pills for headaches but alternative therapies for joints.



Portfolio cannibalisation becomes solutions

What seems like brand confusion often masks complementary strengths waiting to be deployed strategically.

The stories that follow aren't about incremental improvements or marginal gains. They're about discovering that everything you thought you knew about your brand's position, potential, and opportunities was only part of the picture.

See the full picture: welcome to the world of Contextual Brand Tracking.

Why context changes everything

Context impacts brand choice.

An Ipsos R&D study¹ conducted across markets and different categories reveals that the societal values and prevalent issues like economic uncertainties, which we call the “macro context”, and “micro contextual factors” (i.e. when, where, with whom people chose brands) impact people’s decision-making and ultimately brand choice. **The research indicates that context accounts for over 50% of brand choice overall.**

The importance of the context in which brands are chosen holds true across categories with some nuances for brands to capitalise on.

Ipsos Global Equity Database² shows that in FMCG where consideration sets are relatively stable over time, understanding the context of brand choice has the power to determine whether habitual purchases can be disrupted. For example, the same shopper choosing a protein bar for the gym versus lunch replacement faces entirely different needs and competitive sets. In quick service restaurants³, where commitment to brands is typically shallow and choices are many, the context becomes the deciding factor between a brand and its competitors next door.

Traditional tracking would tell you Pure Protein is a protein bar competing with other protein bars for fitness enthusiasts. Logical. Clean. Wrong.

Focusing on the context and moments of snack bar brand choice, Ipsos’ Contextual Brand Tracking revealed something unexpected: Pure Protein wasn’t just competing against other snack bars before or after exercise, its stronghold occasion – it was also up against protein shakes and smoothies, which changes the roadmap.

This isn’t just about expanded competition. It’s about understanding that consumer choice operates in moments, not categories. The same person choosing between bars at 6am is choosing between completely different options at noon. Miss this, and you’re fighting the wrong battle with the wrong weapons.

Ipsos’ Contextual Brand Tracking goes beyond traditional metrics to reveal how context influences brand choice. By examining brands across specific occasions, competitive sets, and consumer needs or moments, our solution uncovers the strategic opportunities and threats that conventional tracking might miss.



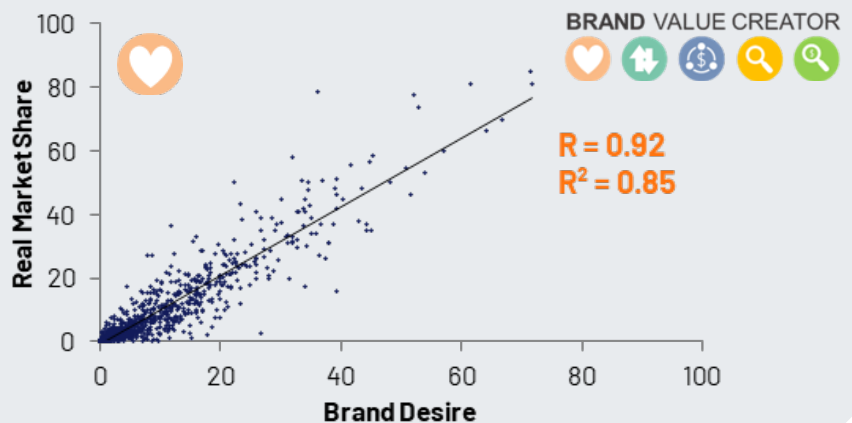
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Underpinned by Ipsos’ proprietary Brand Equity measurement system.

With Ipsos’ extensively validated Brand Value Creator system at the core, Contextual Brand Tracking gives confidence that the insights revealed can springboard brands into action and actual market share growth.

BVC’s Brand Desire score is proven to relate to real world outcomes, which means that our clients can be confident that actions taken based on the insights we provide will have a real impact on their business.

Figure 1: BVC’s Brand Desire is highly correlated with real market share.



The solution was featured in an esomar article⁴ revealing how its holistic approach contrasts with traditional tracking tools that often isolate brand metrics, allowing for a more nuanced view of consumer choices and how they are influenced by context.

Stop thinking in categories, start thinking in occasions

Pain relief is not one size fits all.

When Contextual Brand Tracking mapped the pain relief landscape, it exposed a three-way battle that shifts dramatically with each type of pain. For headaches, pills achieve total dominance – not a single topical or alternative therapy breaks into the top 5. But shift to joint pain and suddenly alternative therapies surge into the top 5, creating a three-way split between pills, topicals, and treatments that traditional tracking wouldn't capture. Most revealing: store brands consistently rank top across all pain types through price advantages, presenting significant challenges for branded offers. Muscle pain presents yet another dynamic, with people managing repertoires of up to 19 different solutions simultaneously – pills for severe pain, topicals for targeted relief, alternatives for ongoing management. Same need, same consumers, completely different competitive realities based purely on where it hurts.

Another great story comes from the beverage company F&N, a big player in Malaysia.

As a leader in the Malaysian ready-to-drink (RTD) beverage market, F&N manages a vast and diverse portfolio, with a presence spanning from hydration brands – carbonated soft drink and isotonic (CSDISO) to wellness, milk and water. While this breadth is a major strength, it also presented a critical strategic challenge: in a market with blurring category lines, how could they ensure their core hydration brands were well positioned to not only defend their strongholds but also identify new occasions as avenues for growth? F&N needed a clear map of this complex battlefield between brands to make their next strategic move.

The RTD beverages consumption by occasion analysis (figure 2) identified key consumption moments for each sub category of the portfolio.

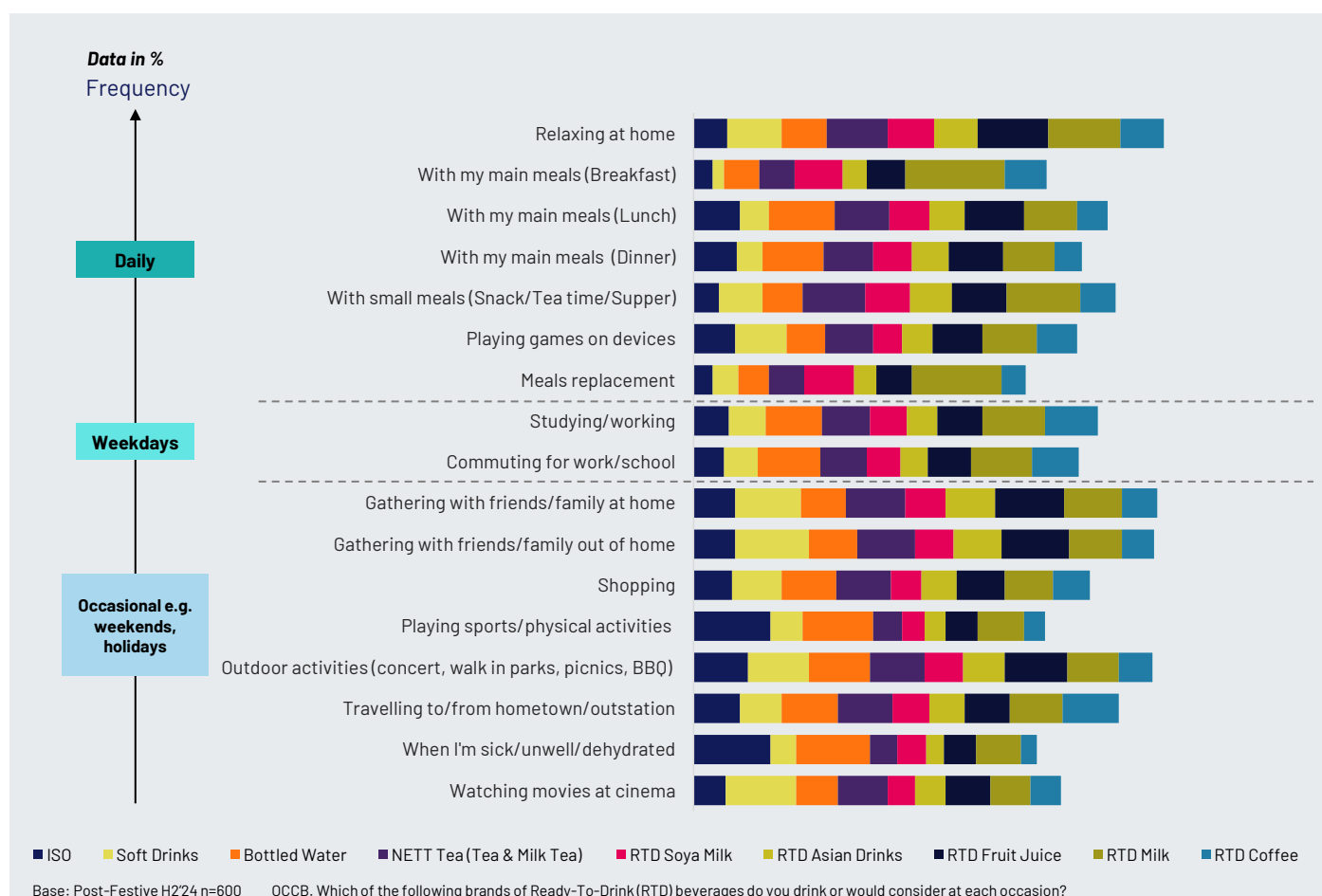
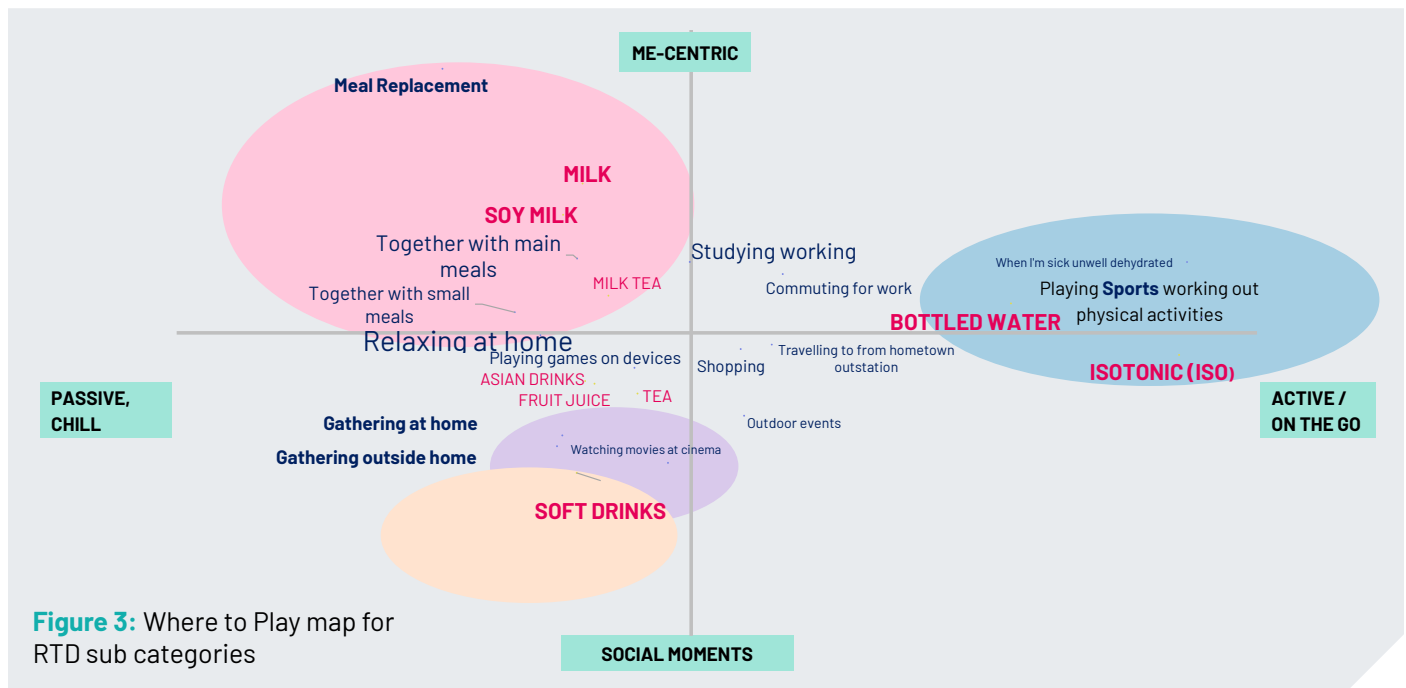


Figure 2: Category consumption by occasions – Contextual Brand Tracking 2024

Key moments for isotonic were identified to be for sports and when unwell, which are rather less frequent moments. Soft drinks were strong in social moments. “Relaxing” and “meals occasions” were opportunities for ready-to-drink milk, juice and tea.

The analysis below (figure 3) reveals Where to Play for F&N, by occasion and by sub category of RTD beverage.



By mapping out all RTD sub categories across occasions, it appears that isotonic, bottled water, soft drinks and milk/soya have distinct roles and play in different occasions, sports, meal replacement and gathering respectively.

Based on these findings, the opportunity for F&N was to emphasise the role of soft drinks in social occasions and leisure activities (social gathering/leisure focus), particularly for out-of-home activities and gatherings with friends/family. Capitalising on more frequently occurring meal occasions by partnering with restaurants and outlets was identified as another area of opportunity. Finally, they could develop new products for indulgence occasions and bring out the fun/joyful moments with soft drinks.

The Where to Play map was fundamental to F&N's success strategy. Khor Kia Vin, Head of Consumer Insights, F&N, said: “The RTD beverage category is highly fragmented and being a market leader, we always knew we needed to move beyond our stronghold in the sports occasion, but we found it challenging to find a breakthrough in winning the next big occasion. Contextual Brand Tracking was instrumental. It allowed us to map out the entire ready-to-drink consumption landscape, with a clear view on where competitors were playing at, and more importantly where they were not. We have now identified secondary occasions to build and are working towards that!”



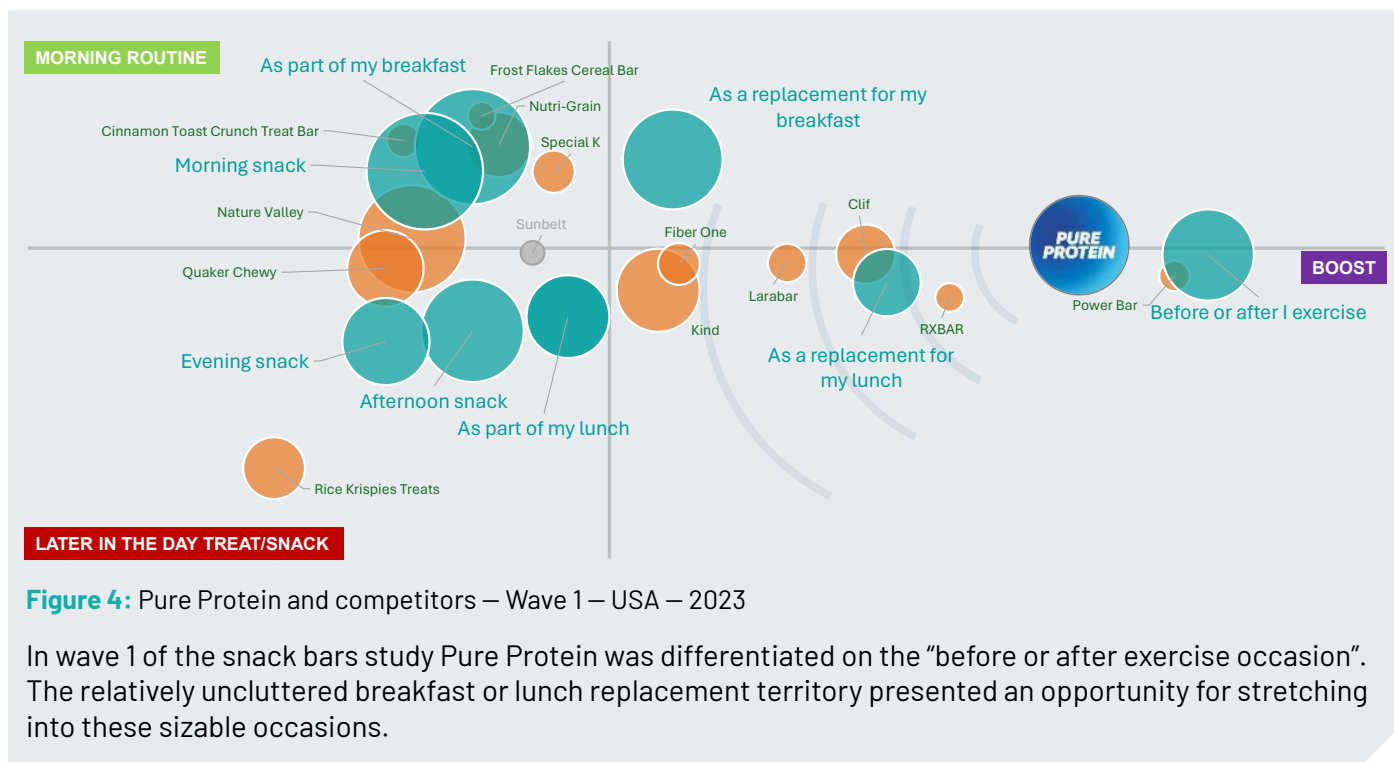
What it means for marketers:

- Re-evaluate your true competitive set.**
 Brands often lose market share not to direct category competitors, but to different types of products that fulfil a consumer's need in a specific moment or occasion. Understanding this broader landscape is critical to defending and growing your business.
- Align your strategy with consumer occasions, not just product categories.**
 Understanding and targeting distinct moments of need (e.g., social gatherings, post-workout recovery, meal replacement), will enable you to develop more relevant messaging, innovations, and activation plans.
- Identify “white space” for growth by mapping the entire consumption landscape.** Analysing all relevant usage occasions reveals a clear map of where your brand can win. This allows you to move beyond defending existing strongholds and strategically pinpoint untapped occasions to build a clear roadmap for future growth.

Discover moments of hidden potential

Contextual Brand Tracking reveals new moments of consumption and can fuel your innovation strategy.

The snack bar Pure Protein seemed destined for the gym bag – a protein bar for fitness enthusiasts, competing with other nutrition-focused offers. But our study revealed a startling truth: the brand had latent desire in meal replacement and afternoon snacking moment. While Pure Protein focused on the exercise occasion (where it held decent 9.3 Brand Desire), consumers were already placing it in entirely different contexts. The lunch replacement opportunity wasn't just viable – it was sizeable, uncluttered, and showed stronger potential than the gym. The observation of the broader competitive context beyond snack bars allowed the innovation roadmap to write itself – new formats for new occasions where desire already existed.



A year later, in wave 2 of the study, the market had validated what the survey first revealed: “meal replacement” spontaneously emerged in consumer language about Pure Protein, unprompted by any marketing, coupled with increased desire within that moment. The fitness brand’s future wasn’t in building stronger gym credentials – it was in following consumers to the lunch table where they were already taking it.

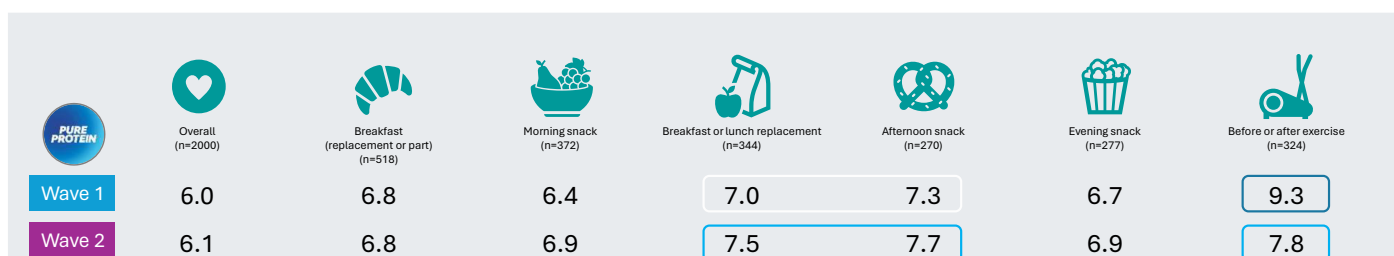


Figure 5: Brand Desire for Pure Protein amongst people who frequently enjoy snack bars at each occasion – USA – 2024

In wave 2, Pure Protein achieves almost the same Brand Desire score amongst those who eat snack bars for a meal replacement or an afternoon snack as it is amongst those who exercise. This confirms the growth opportunity as identified in wave 1.

When people spontaneously associate your brand with unexpected occasions or uses, when desire spikes in territories you're not targeting, when mental networks reveal themes you're not addressing — these aren't anomalies. They're your future trying to emerge. The question isn't whether to pursue them, but whether you'll act before competitors discover the same signals.



What it means for marketers:

- **Look beyond your brand's presumed core occasion or category** to discover hidden opportunities where consumer desire already exists. For example, Pure Protein's growth highlights how meal replacement and snacking occasions can offer larger, less crowded growth avenues than the originally targeted exercise moment.
- **Track unprompted signals in consumer sentiment** to reveal emerging opportunities and innovation directions pre-emptively. This enables faster and more confident decision-making for market share growth.
- **Innovation and portfolio strategies can be occasion-led**, developing new formats and messaging aligned with your consumers' actual usage rather than traditional category assumptions.



Portfolio optimisation – from cannibalisation to complementarity

Traditional portfolio management rationalises cannibalisation. **The context lenses reveal something far more interesting: apparent conflicts often mask complementary opportunities.**

A major social media company faced what seemed like cannibalising applications within their portfolio competing for the same users. Traditional analysis might have suggested pruning. Understanding the context of use of the social platforms revealed something else entirely.

One application naturally owned “inner circle” connections (family, close friends), while the other excelled at “outer circle” discovery (influencers, trends, culture). Users weren’t choosing between them; they wanted both – connection and sharing from one, cultural exploration from the other. Rather than forcing both to be everything to everyone, the context analysis suggested letting each own its natural territory. Growth in “outer circle” moments wouldn’t cannibalise “inner circle” strength.

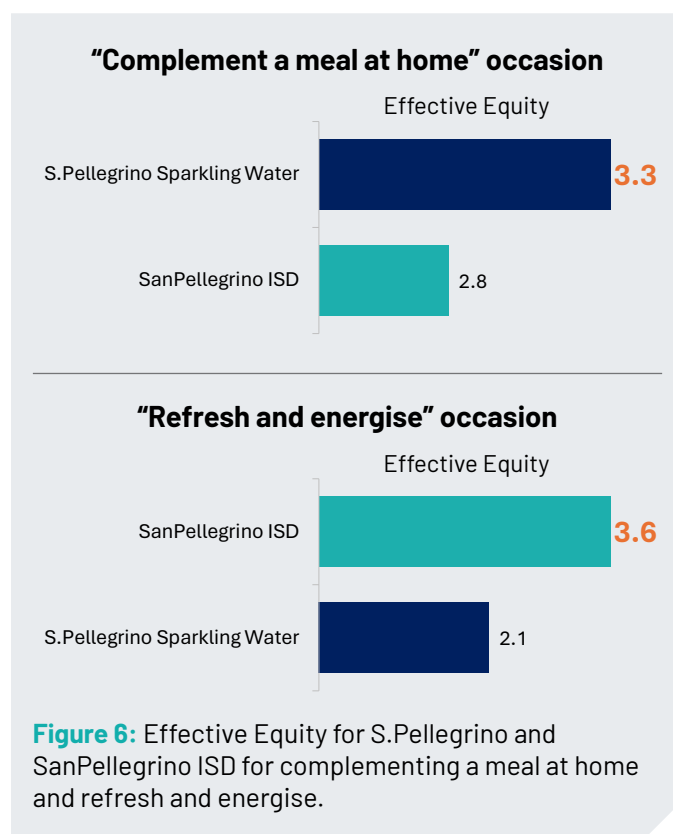
Another discovery is the story of S.Pellegrino sparkling water and SanPellegrino ISD flavoured drinks – two premium beverages competing in a fiercely crowded and highly competitive market of waters, soft drinks, iced teas and energy drinks.

S.Pellegrino showed potential to complement meals at home, enhancing dining experiences; whilst the SanPellegrino ISD was poised to fly in refresh moments, competing head on with sodas on refreshment. This provided clarity on the role of each brand to gain share, each one forging ahead whilst

not at the expense of the other. The strategy was clear: deploying each brand strategically by moment.

S.Pellegrino could own “elevating everyday dining” and SanPellegrino ISD could claim “refreshment”.

In that case, the focus on context allowed us to monitor the brands’ performance across the portfolio but also uncover routes to avoid cannibalisation.



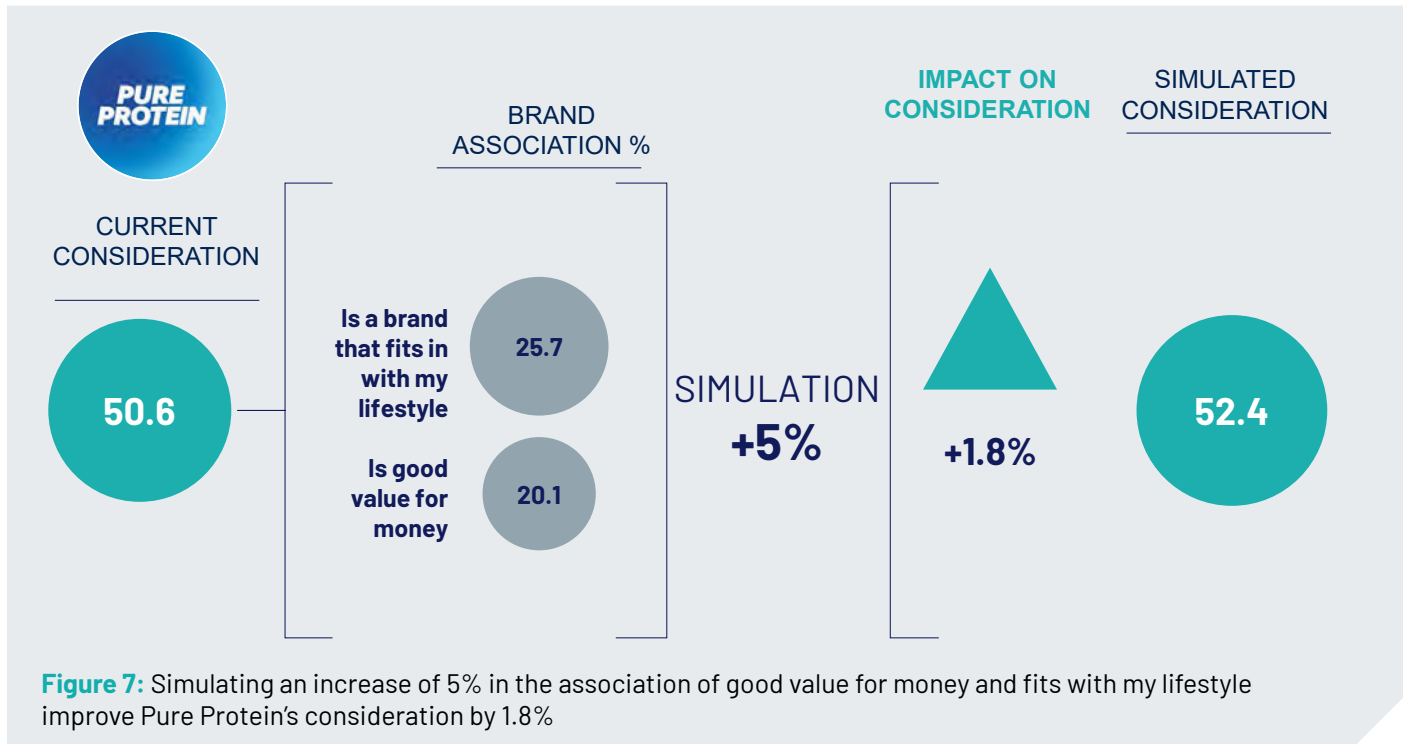
What it means for marketers:

- **Stop seeing portfolio overlap as cannibalisation to eliminate.** Start seeing it as complementarity to orchestrate.
- **Leverage each brand’s natural role by occasion** to clarify strategic positioning and inform resource allocation to achieve growth.
- **Deploy brands strategically by occasion** to prevent internal competition and mitigate negative market impacts.
- **Implement occasion-based tracking** to avoid cannibalisation, unlock growth opportunities, and sharpen differentiation in competitive markets.

A glimpse of the future through present signals

Revealing not just the current state but what the future trajectory is for each brand matters for brand owners.

When Pure Protein simulated improving “fits my lifestyle” messaging while emphasising value, the analysis suggested specific consideration gains. But more importantly, it revealed the mechanism: lifestyle fit + value perception = permission to exist beyond the gym.



The social media simulations were even more revealing: a 5% increase in the most influential driver, “has content I trust” translated into a 1.1% increase in Brand Desire for one application, plus improved perceptions of quality, values, and community. And it was clear that growth in this social media application wouldn't come at the expense of the sister brand's equity, thereby proving the portfolio strategy.

These aren't just “what-if” scenarios. They're strategic blueprints showing exactly which levers to pull and what cascading effects to expect.

Contextual Brand Tracking goes beyond monitoring the traditional brand KPIs by showing potential paths forward for brands.



What it means for marketers:

- **Identify and combine key growth drivers** to determine which combination of attributes will most effectively change consumer perception and expand usage occasions.
- **Quantify the impact of enhanced messaging** to prioritise initiatives with the highest potential return on investment before committing to a full campaign.

Conclusion: the power of unexpected brand journey

The unforeseen truths Contextual Brand Tracking reveals challenge assumptions, disrupt strategies, demand action. And they unlock possibilities invisible to conventional measurement. Remember that:

- Competition is broader than categories
- Brands can also win outside their core
- Occasions tap into different needs and motivations
- Portfolios can complement not cannibalise
- Pathways to map the best way forward for your brand are waiting to be discovered

Just as the best travel experiences come from venturing beyond the tourist checklist, your brand's greatest opportunities lie beyond traditional metrics. In a world where categories blur, occasions multiply, and consumer needs fragment, traditional tracking is necessary but worth being enhanced with context. Contextual Brand Tracking tells you where your brand stands and it also identifies the hidden places and moments where your brand could be more successful. **See the full landscape with Contextual Brand Tracking.**

Ipsos' Contextual Brand Tracking

Contextual Brand Tracking is Ipsos' flagship brand measurement solution that goes beyond traditional metrics to reveal how context shapes brand choice. By examining brands across specific occasions, competitive sets, and consumer needs, Contextual Brand Tracking uncovers the strategic opportunities and threats that conventional tracking misses.

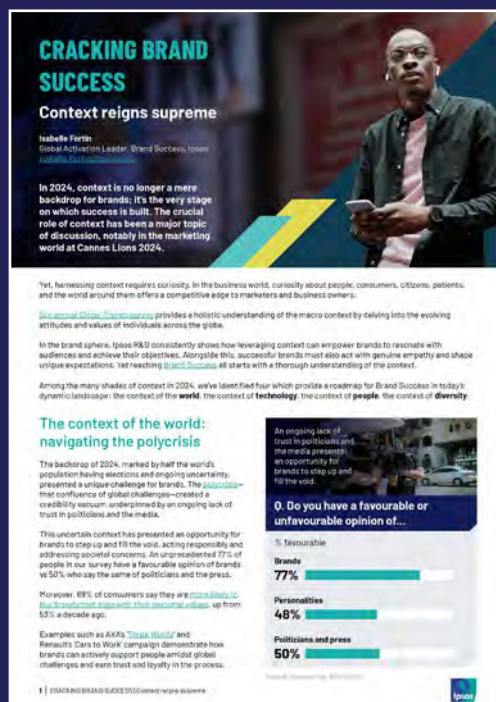
For more information about implementing Contextual Brand Tracking for your brand, contact your Ipsos representative or visit our website: www.ipsos.com



Sources:

- 1 Ipsos R&D 2023 (N=17,386). Category Users/Buyers in UK, USA, Japan, France, Mexico, Colombia, Chile, Brazil, South Africa and Germany across streaming, banking, credit cards, sparkling water, beer, retail, analgesics, money management platforms, skincare, automotive and white goods.
- 2 Ipsos Global Brand Equity Database, FMCG sector, 2015-2025
- 3 Ipsos Global Brand Equity Database, Quick Service Restaurants sector, 2020-2025
- 4 esomar paper: How Decision Intelligence Enables Pernod Ricard to Measure and Optimise the Performance of its Brands and their Key Activations. 2023
- 5 Brand Value Creator R&D Snack bars, USA, 2023 and 2024
- 6 Brand Value Creator R&D Pain relievers, USA, 2025
- 7 Brand Value Creator R&D Social media applications, USA, 2024
- 8 Brand Value Creator R&D Beverages, USA, 2025

Further Readings:



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