

SHIFTING CONTEXT, SHIFTING PRIORITIES

Time for a strategic reset?

By Gillian Drewett, Chris Murphy and Jim Needell | December 2020

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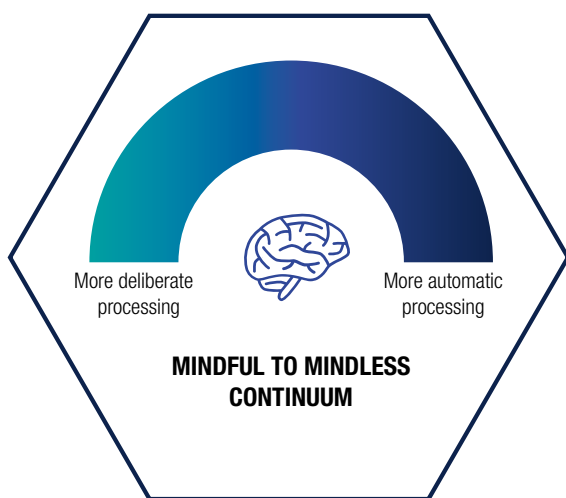
THINGS ARE DECIDEDLY DIFFERENT. AND WE ARE DECIDING DIFFERENTLY.

Our ongoing crisis is now a combustible brew of medical, financial and socio-political ingredients – all set against the backdrop of an omnipresent environmental threat. Given these conditions, our context has changed and is changing. We socialise differently, we work together differently, we prioritise differently, we buy differently, we consume differently – and we *decide* differently.

With this in mind, is the time right for reviewing your strategy and the foundational insights on which it is based?

This paper will take you on a journey. Beginning with how we now know people make decisions and the critical role of context. Followed by a brief detour as we delve into the concept of “wilful blindness” and its relationship to consumer priorities. The last stop on our journey will showcase recent tangible shifts in decision drivers.

Figure 1 The mindful to mindless continuum



Source: Ipsos

Our data tells us that many are seeking to make different choices that are more reflective of the times in which we live and the values we hold.

A WORD ON SHIFTING CONTEXT

In *Dancing with Duality: Achieving brand growth in a mindful and mindless world*¹, we explored how decision-making is dynamic and contextual, adapting in accordance with what is going on within us and around us – our *internal and external context*.

Some contextual changes make a collective, shared and irrefutable impact across societies. And the shifting sands of our current multidimensional crisis have undoubtedly impacted the context in which we live our lives and the decisions we make.

We also know decision-making processes are both mindful and mindless in varying degrees, depending on the context. In the face of macro shifts, our data tells us that many are seeking to make different choices that are more reflective of the times in which we live and the values we hold.

When this happens, the decision-making process becomes more *deliberative*, as the selection procedure is different to the one that might habitually be taken.

Amidst a period of pronounced and prolonged contextual disruption, some decisions are requiring more mindful deliberation as previous choices are questioned and new ones are made. There is growing evidence of people making new and different decisions in response to the mercurial context of our time. With time, this new behaviour is likely to also become more mindless.

A BRIEF DETOUR: WILFUL BLINDNESS

“ We react to things because of where we stand – not because of what they are.

Jon Meacham

“ Our brains are wired to not only **wilfully blind** ourselves to evidences that contradict our beliefs, but to perform cognitive acrobatics to rationalize away the contradictions...we **could** know, and **should** know, but **don't** know because it makes us **feel better not to know**.

Margaret Heffernan

“ Shoulda, Woulda, Coulda.
The three blind mice.

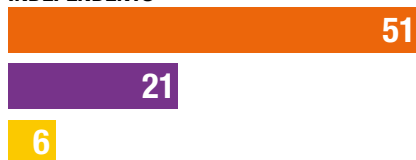
Philip Roth

Figure 2 Percentage who agree “the official COVID-19 death toll is exaggerated”

REPUBLICANS



INDEPENDENTS



DEMOCRATS



FOX ABC/CBS/NBC CNN/MSNBC

Source: Axios-Ipsos Coronavirus Index, Reuters/Ipsos Core Political

Building on the theme of newly emerging priorities and the more deliberative processing required to get there, let's examine the phenomenon of wilful blindness and how it plays out in the pandemic.

We see the concept of wilful blindness manifest in many arenas, often in the way that information is packaged, communicated and interpreted. The quotes from Meacham and Heffernan speak to an inability to process new information with full objectivity, as an existing worldview colours the intake of basic facts. Figure 2 illustrates this by showing how the affiliations between media and politics come together when people in the United States were asked about the COVID-19 death toll.²

And there are obvious consumption applications of the wilful blindness concept:

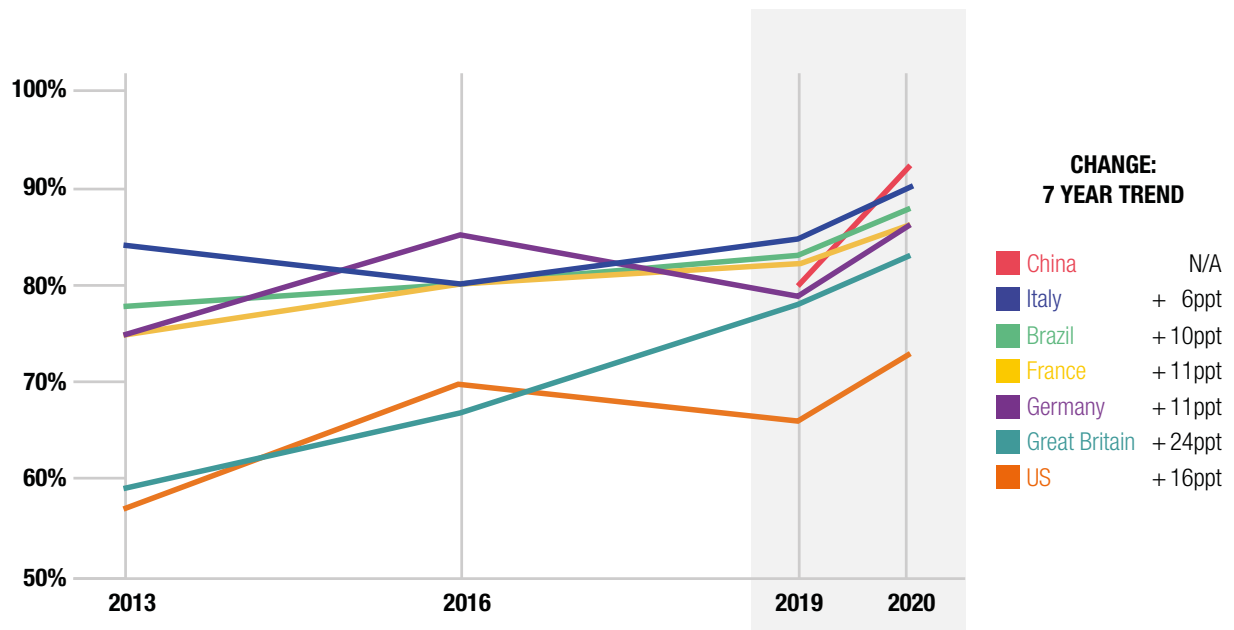
- Knowing carbon emissions need to be reduced, yet choosing the convenience of flight over eco-friendly transport.
- Choosing to buy bottled water, knowing the environmental impact.

While this phenomenon will not disappear, we do see data suggesting some priorities are shifting. Which begs the question: **Are we less willing to accept fractures in what is valued and the decisions that are made?**

In the midst of dramatic contextual shifts, perhaps we are deliberating global issues that were easier to ignore in the past.

Consider the environment. In 2020, we witnessed an increase in agreement across seven countries that the planet is facing a climate emergency (see Figure 3). Whether COVID-19 has drawn more attention to this global issue is not certain – but the climate crisis has certainly not been obscured by the medical crisis.

Figure 3 Percentage who agree “we are heading for environmental disaster unless we change our habits quickly”



Source: Ipsos Global Trends Series

There is growing evidence of people making new and different decisions in response to the mercurial context of our time.

As attentiveness to climate concerns increases, we hear from more consumers who are environmentally conscious in their brand selections. Consider these sentiments expressed by those who have participated in our year-long longitudinal study in 2020:

“

I stopped cleaning everything with wipes, it kills the planet. I want to use more and more natural products.

Ipsos Longitudinal
Ethnography Panelist



“

I'd like to use more natural cleaning products – I am not concerned about if they work better or not – I want to do it for environmental reasons.

Ipsos Longitudinal
Ethnography Panelist



At the same time, the use of chemicals is a necessary evil for some when it comes to sanitation; that is, nature may be nurturing but maybe better chemicals clean best and are ultimately safer for my health:

“

It's a psychological thing for me. I am really worried and I just want to use the awful industrial stuff – and I know it's terrible for the environment, I know it.

Ipsos Longitudinal
Ethnography Panelist



“

When it comes to health care, I worry less about what's natural and what's not. I care more about what's effective and what's not.

Ipsos Longitudinal
Ethnography Panelist



It is imperative to ensure the foundational data which is used to provide strategic direction is accurately measuring this changing context and capturing shifts in consumer priorities.

While finding the right balance between preservation of nature and efficacy/personal safety is an ongoing pandemic dilemma, we do see more deliberate decision-making in this area. Consciousness does not always equate to behaviour change, but it does suggest at least one blinding veil is lifting.

Given the combination of health, financial and socio-political challenges, consumers seem to be increasingly extending their awareness of global issues and shifting their needs and wants onto brands.

Ipsos Global Trends 2020³ data shows us:

- People now expect more from business and brands, with 68% of people around the world wanting commercial brands to speak out on social and political issues.
- In the UK, 72% of respondents agree that they 'tend to buy brands that reflect my personal values'. This is a 16 percentage point increase over 2019.

To solve the tension between our conflicting needs and wants, brands have more licence to directly confront our wilful blindness. As some consumers wrestle with the tension between their behaviour and their values, there are both opportunities and challenges for brands.

To get this right, brand owners need to have a clear understanding of the current consumer decision-making context. It is imperative to ensure the foundational data which is used to provide strategic direction is accurately measuring this changing context and capturing shifts in consumer priorities.

MINDFUL PROCESSING AND RE-PRIORITISING

“

I think that in two years, the world really will be a better place to live. This will be an eye opener for people about what the important things are.

Ipsos Longitudinal
Ethnography Panelist



Knowing there is tangible evidence of people making new and different decisions because of their new and different realities, as researchers we have a responsibility to ensure wilful blindness is *not at play* in our profession when it comes to the longevity of survey-based information.

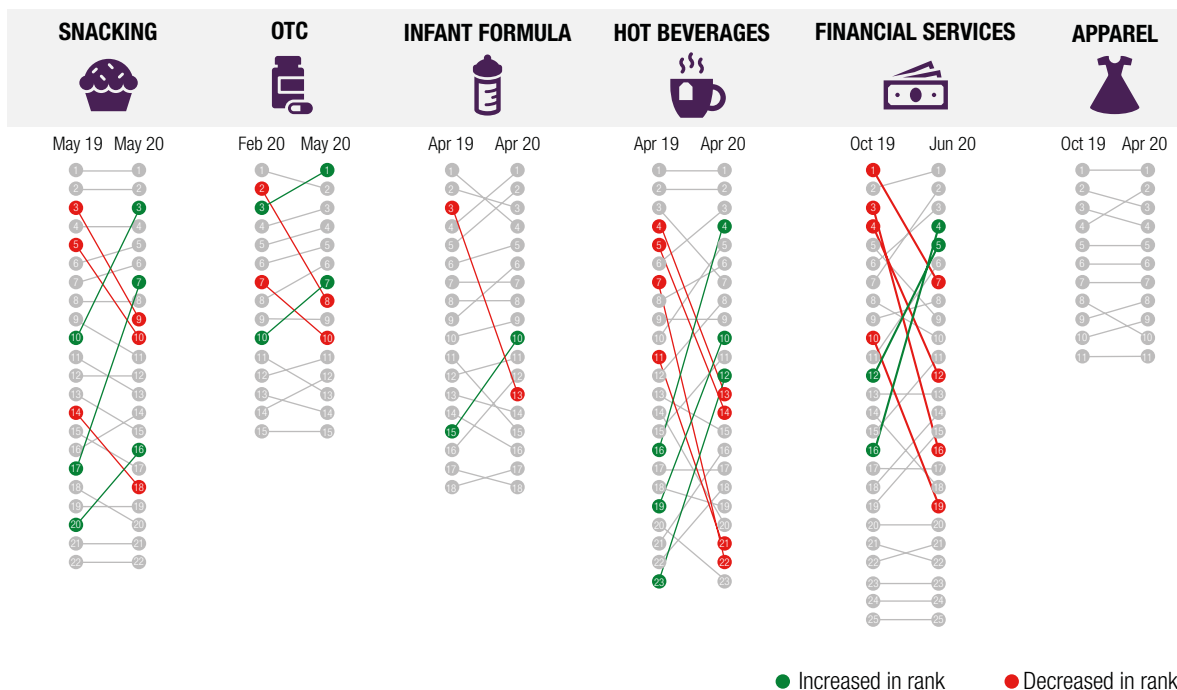
Brand leaders make decisions based on the information we provide from data that should reflect people's realities at the time. So, we asked ourselves an important question: **Knowing how people make decisions in the face of the ongoing crisis, is the information we provide helping drive the right decisions?**

To answer this, we turned to Ipsos' Brand Tracking Database – it is time-based and offers the consistency in sample and methodology needed for making the necessary comparisons between different time periods. This can help to understand what (if any) impact the shifting context is having on consumer priorities.

Using Ipsos' proprietary driver analysis technique, we checked for changes in the rank order of the importance of attributes across six different categories – comparing data from time periods before and during the pandemic. Movement in the order of attributes indicated shifts in what people consider to be important.

Results from this data driven, evidence-based investigation are notable for both what is there and for what is not. In Figure 4 below, we see clear changes in the rank across several different attributes across five of the six categories, while shifts in apparel attributes do not occur.

Figure 4 Shifts in ranking of drivers: before COVID-19 and beyond



Source: Ipsos

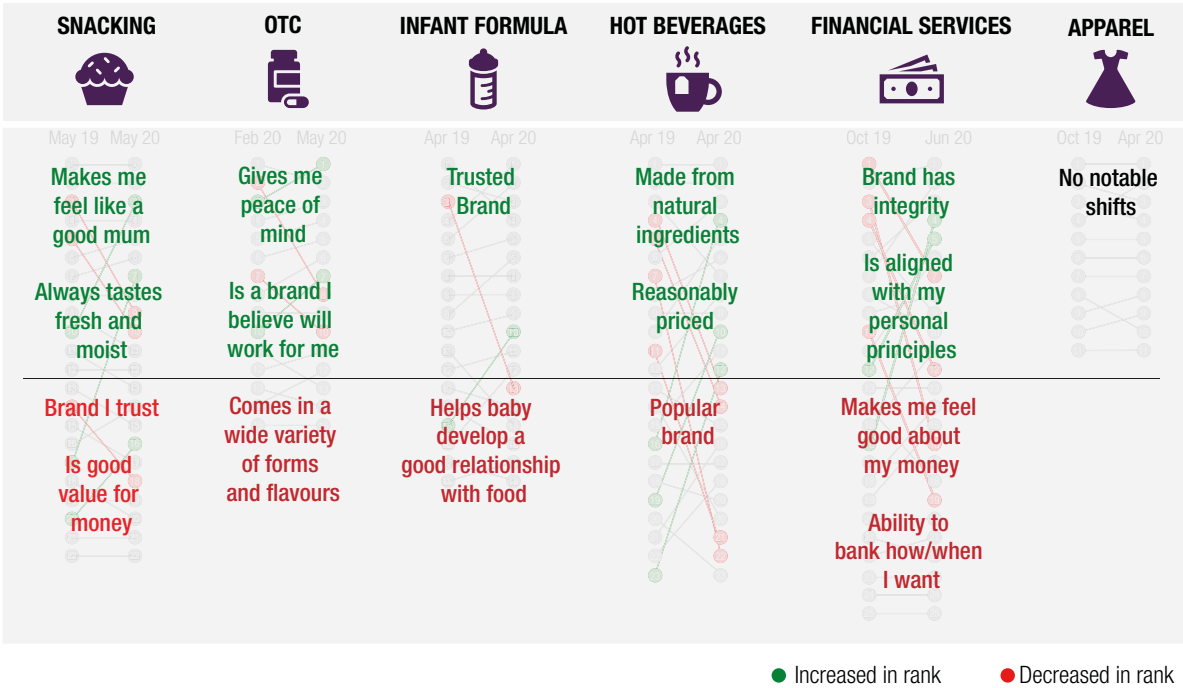
When we look at the attribute statements that have shifted, they are specific to their respective categories – seemingly reflecting how the current context may be influencing categories differently.

These unusual shifts in consumer priorities seen in this research-on-research teach us that what was once important may no longer be quite so important. The key implication here is that strategic decisions for current times need to be taken with current information to ensure brands can appropriately meet evolving priorities.

But what about the absence of notable shifts in the apparel category? While we see pervasive evidence of change in decision-making priorities, it doesn't mean there are changes in every category in every country.

So before we make assumptions of shifts in drivers, a proper re-visitation of the data is prudent.

Figure 5 Shifts in ranking of drivers: before COVID-19 and beyond



Source: Ipsos

PRESSING THE RESET BUTTON ON STRATEGIC FUNDAMENTALS

In a period of profound internal and external contextual change, **where people are examining their own blindness and pausing to re-prioritise**, brands need to adapt to deliver against a shifting set of consumer decision criteria and expectations.

Brand owners should be conscious of the fact that the socio-economic context in which people make decisions is dynamic. People's beliefs, values, and goals are influenced by these changing socio-cultural contexts. This means that the relevant associations consumers have with a brand can be different in these different contexts, and they can change over time.¹


Foundational insights drive foundational business decisions, so brands need to be very sure they remain in touch with

what is driving consumers' decisions. We see evidence in many categories that pre-pandemic priorities have shifted, but to what extent for individual categories remains an open question until analysis is conducted that better reflects the specific category context.

So, what about your brand? Are you still making decisions based on what might be outdated, pre-pandemic insights?

The time is right to reflect on the usability of your insights.

As consumers decide differently in this decidedly different time, a thorough audit of the foundational insights that fuel your strategy will ensure you are poised to thrive amidst shifting contextual sands.



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REFERENCES

1. <https://www.ipsos.com/en/dancing-duality>
2. Axios-Ipsos Coronavirus Index, Reuters/Ipsos Core Political
3. <https://www.ipsos.com/sites/default/files/ct/publication/documents/2020-02/ipsos-global-trends-2020-understanding-complexity.pdf>

WATCH

BLINDSIDED – a 20-minute documentary based on CovidWatch, an international digital ethnography research project looking at how the pandemic changed our lives.

<https://vimeo.com/448365971/8384afd217>

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Gillian Drewett Global Head of Offer & Innovation, Brand Health Tracking, Ipsos

Chris Murphy Global President, Market & Brand Strategy, Ipsos

Jim Needell Chief Client Officer, Ipsos MORI

Contributors:

Claudia Meillat Global Head of Brand Health Tracking Analytics, Ipsos

Steven Naert Global Solutions Leader, Brand & Portfolio, Ipsos

Rich Timpone Global Lead of Data Science and AI, Ipsos

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