

When Everything Looks Alike, What Wins?

The Values Shaping Our Choices in a World in Flux

Katerina Moshandreou

Account Director | Focus Bari S.A.

Our sources

CX stories

Customer Experience
Barometer

The Voice of the Customer,
2025-2026

YouGov[®] Profiles

A 360 syndicated
profiling, segmentation
& media planning tool

Qualitative insights

Various categories and
approaches

2024-2026

More choice means less analysis

We have never had so many brands, channels, offers and ways to compare. Yet the more options we face, the faster we look for one good reason to decide — not a full analysis.

What has really changed

Competition

Consumers compare ways to meet a need — not just brands in a category

Communication

The same promise can be powerful for one person and irrelevant for another

Price Dependency

Without a clear reason to choose, price becomes the only differentiator

The critical question is not "what product do we have?"
... it is **"Why might a consumer choose us?"**

Consumers' mental shortcuts are key

When dozens of options compete, consumers do not compare everything. They look for one personally relevant reason to close the decision.

Miss the right shortcut and the only dimension left to compete on is price.



Convenience



Opportunity



Solution



Experience

The reason to choose changes with the person and the moment

Four different reasons to buy a burger

01

Convenience



Three clicks and food arrives. He is buying time, not a burger

02

Opportunity



A flash deal triggers the purchase. The offer, not hunger, decides

03

Solution



The fridge is empty and kids are tired. The burger solves a real problem

04

Experience



Friday night out. The real competitor is a bar or an event

The real competitive set includes every alternative that satisfies the same consumer need

The same leisure market, different shortcuts

Even when it comes to leisure, experience is not one need; the data shows simultaneous value, time, emotion and discovery triggers.

Value pressure

68.1%

say attraction tickets are too expensive; price becomes salient when the proof of value is weak.

Emotional release

77.0%

value hobbies that help them relax and reduce stress; the “competitor” is anything that delivers relief.

Discovery

58.5%

are willing to travel long distances to visit new attractions; novelty can justify effort.

Time friction

37.0%

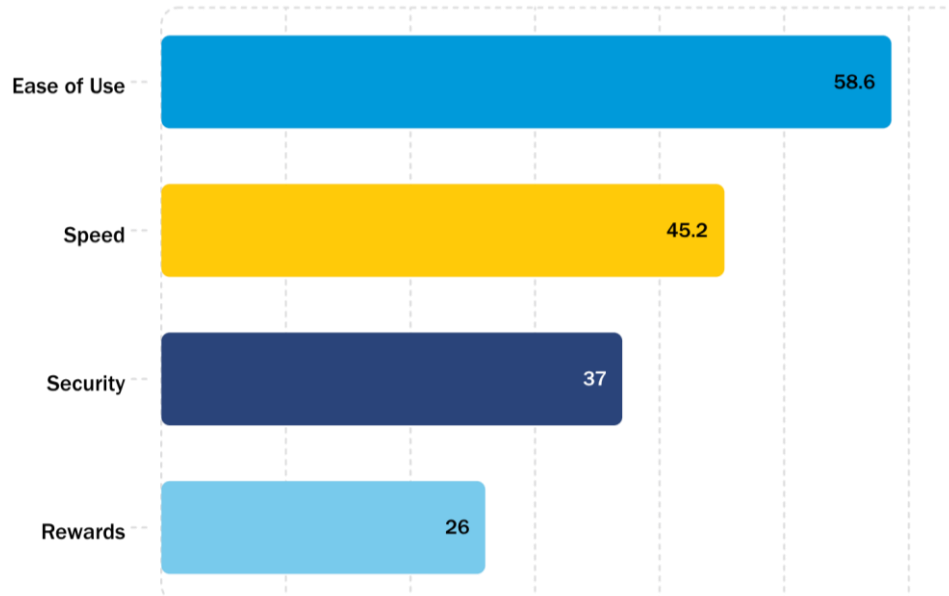
say they do not have enough free time to visit attractions; convenience can unlock demand.

For leisure, retail, food service or entertainment, the offer is not only competing with similar offers. It competes with the consumer’s time, stress level, sense of value and desire for discovery.

This is why the same experience category needs several commercial triggers — not one generic message.

Payment methods: A real-world example

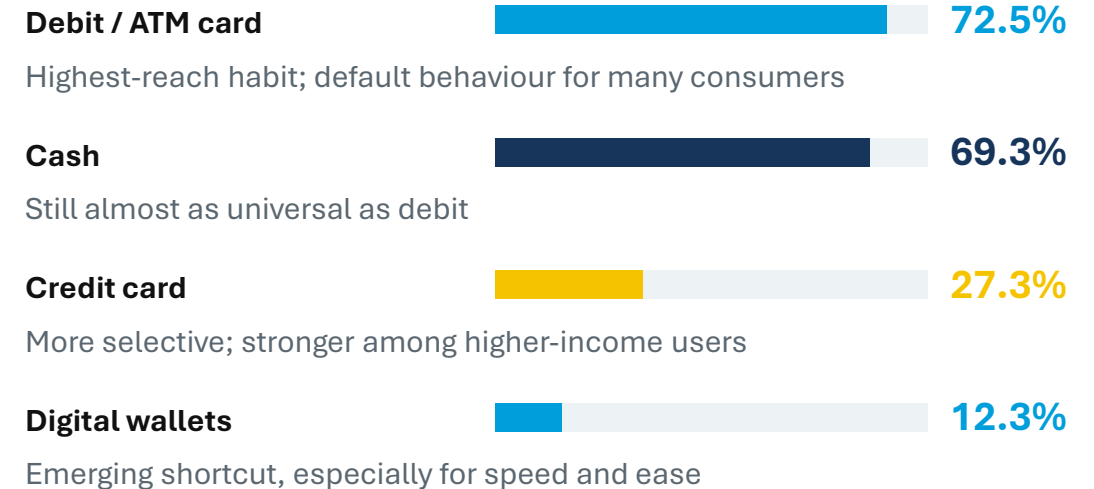
Drivers to choose a payment method



Older users

"It's simple" & "You're safe"

Payment methods used in the last 30 days



Younger users

"No time wasted" & "Every transaction earns value"

Commercial lesson: do not communicate the feature. Communicate the friction it removes.



Three core learnings

More choice creates a greater need for shortcuts

Consumers seek cues that reduce complexity, not exhaustive analysis
Complexity drives the search for a fast, personally meaningful reason to decide

Value depends on the moment

The same product, feature or service means something different to each person, depending on who, when and why

Need defines competition

Businesses think in categories. Consumers think in problems to solve
Competition extends beyond traditional product categories

The way to win is to decide which shortcut to own — then prove it consistently

1. Prove difference

63.4%

agree that all banks are the same. In low-differentiation categories, value must be concrete, not just claimed.

2. Choose the cue

53.1%

agree that brands need innovative ways to market themselves and their products. The cue must match the consumer's moment.

3. Avoid false shortcuts

12.1%

overall trust in celebrity / influencer recommendations is limited, despite higher trust among 18–24 (24.7%).

What this means in commercial terms

- If the category looks similar, differentiation must be tied to a specific job-to-be-done.
- If price pressure is high, prove value before asking consumers to pay more.
- If the audience is fragmented, build message variants around triggers: ease, security, reward, discovery, relief.

**The strongest brands do not just add benefits;
they make the right benefit easy to recognise at the moment of choice.**

So, what do we do with this?



Brands

From promises to proof of value, performance, reliability, and empathy



Marketers

Move from “one message for all” to the specific trigger each audience needs.



Retailers

From simple availability to an experience that reduces effort, risk, and decision time at every touchpoint



Commercial Teams

From a focus on price to offers with distinct benefit levels for different motivations

Practical takeaway: The key is not only what we sell, but which motivations we activate for each audience at each moment of purchase

THANK YOU

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