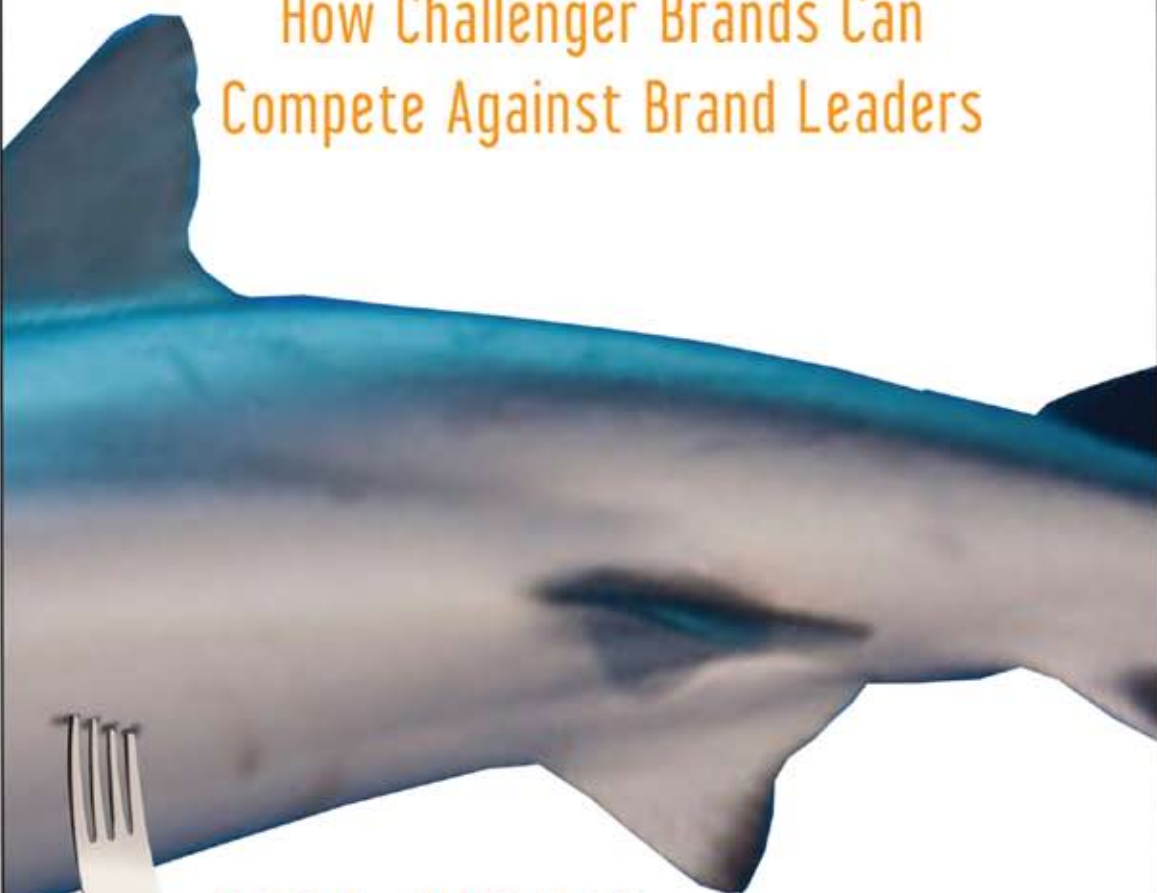


REVISED & EXPANDED

SECOND EDITION

EATING THE BIG FISH

How Challenger Brands Can
Compete Against Brand Leaders



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STANCES AND NARRATIVES

If the Eight Credos represent the component elements of challenger thinking and behaviour, there clearly is an overarching stance that a challenger will take in relation to the rest of the market, around which they will build each piece of their unique challenger mix. Much of this will of course be driven by their Lighthouse Identity but if one looks at the wealth of challenger examples from the last fifteen years, one can also see some commonalities emerge.

We will examine twelve of these kinds of stance in this article, and the challengers that have made them a central theme. Each of these stances, while they represent an overall place to stand from which to project their identity, also have key aspects of narrative to them - the different way this challenger is seeking either to find its place within the overall narrative of the category or wider popular culture or, more often, the different way it is trying to change or subvert to its own advantage the narrative of the category or wider culture.

As I've said, we will for the purposes of this article look at a typology of 12 different kinds of stance. We'll start off by exploring each of them in turn, and make the overall observation in doing so that while many people commonly link the idea of 'the challenger' with the archetype 'the outlaw' (and all the attitude and behavior that characterises that), that is an unnecessarily restrictive and misleading link: we have a much richer universe of potential stances open to us. And we'll go on to explore, how some challengers move through different stances to keep their relationship with the category and the consumer fresh.

So in the table that follows, there are five columns. The first on the left is that of the type of challenger stance. The second on the left offers a short illustrative group of examples, followed by the central column, which gives a brief description of the key elements of the stance taken. The fourth column from the left, playing this out a little, looks specifically at what this kind of challenger is actively challenging. And finally the fifth column, the one on the right, looks at why groups of the buying public might be attracted to this stance.

Challenger Stance	Example	Brief Description	Challenging what?	Reason for Attraction
<i>The People's Champion</i>	Virgin Atlantic, Linux, Wikipedia, Avaz, Daffy's,	Consciously sets self up as on the side of the consumer, often specifically against the cynical / fat cat market leader	Motives and Interests of the Market leader	They are fighting for me – I win
<i>The Scrappy David</i> (vs. Goliath)	Miller Lite 2005, Ryanair, Avis 1960s, Pepsi Challenge	Stick it to the King	The dominance of (and unthinking consumer preference for) the market leader	'Nobody roots for Goliath' – people like underdogs
<i>The Enlightened Zagger*</i>	Camper, Nextel, PETA, Fosters	The enlightened brand deliberately swimming against the prevailing cultural tide. Often takes low status/ blue collar stance	A prevailing and commonly/ unthinkingly accepted aspect of contemporary culture	Engaged by the counter (often un PC) stance
<i>The 'Real and Human' challenger</i>	Southwest, Ben and Jerry's, Sam Adams, innocent	A 'real' people brand in a faceless category. Sometimes real people / founders, but not necessarily just founders) visible behind the brand. Often accompanied by the perception of 'small', in stature.	The joyless impersonality of the market leader or category.	'Thank god for some real people who get what I am about – and who really care about what they are doing'
<i>The Missionary</i>	Dove, JetBlue, AI Gore 2.0,	A challenger fired up with a view about the world it has to share. Often looking to 'put the category right' in some way.	The belief system underpinning the category to date	Identification with beliefs about category (and way category fits into world)
<i>The Demoraliser</i>	IKEA, Target, Zara, Digg, YouTube, Current TV	A brand that is taking something previously exclusive (stylish, luxurious, hi tech or 'controlled' by a particular profession), and making it much more broadly available to the masses	'Elitism', the idea that something should be available only to the privileged, wealthy or expert	They enable me to enjoy living and participating in the world in a way I thought was only for 'the few'
<i>The Irreverent Maverick</i>	Red Bull, MAC, Mountain Dew, Cnnmptr	Counter-cultural attitude in a box	The complacency and narrowmindedness of the status quo and those who keep to it	Identification with the attitude
<i>The Visionary</i>	Method, Whole Foods, Zipcar	Sets out higher vision that transcends category nature	The mundanity of the way the category thinks about its nature and role	Identification with vision
<i>The Game Changer</i>	Wii, Lush, Lexus	A brand and product with an entirely new perspective on the possibilities of a category, which invites the consumer to participate in the category in a whole new way	The fundamental drivers and codes of the category to date. Not the beliefs or values – more the dimensions of the consumer experience it has played up and played down.	Engaged by fresh perspective on a familiar market. 'Wow, I'd never thought of the category like that before'
<i>The Killer App</i> (Product on Experience)	Napster, Skype, Joost	A product or service (without much branding attached to it) that is so revolutionary, it becomes de facto a challenger brand	The way consumers think about product in the category	This changes everything. That product is so good at what it does, brand loyalty has just become irrelevant.
<i>The Next Generation</i>	Pepsi Next Generation, Silk soy milk (The New Milk), Eurostar (the future of European travel)	That was then and this is now	The relevance of the market leader (or perhaps every player in the market) to the modern world, or current generation	New times call for new brands, and I as a person am part of the new times
<i>More for less/ The Same for much less</i>	'Two Buck Chuck', 50% insurance companies, Motel 6, Easyjet, early private label	A challenger offering a proposition rooted in significantly superior value for money	The current value equation	You can't argue with the price

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A BRIEF DISCUSSION OF EACH OF THESE TYPES

The types themselves and the differences between them are, I hope, made fairly clear within the table itself. But let us explore each of them individually in the interests of clarity.

1. THE SCRAPPY DAVID

This is what many automatically think of as the classic challenger stance. Avis and The Pepsi Challenge, those two iconic challengers, which in many people's minds (wrongly) define the totality of challenger thinking, both fit this 'David vs. Goliath' model. This route does 'reduce the world to binary' – i.e. just two brands for the consumer in a category to choose between. It offers at least an emotional reason to support the underdog (they admire our cheeky attitude), and perhaps a rational product or service one as well.

It is worth noting that this (and the challenger type that comes next) have a lot of appeal for cultures with so called 'Tall Poppy Syndrome' – namely, that take pleasure in cutting down something that is so successful it towers above everyone else (Australia and New Zealand for example).

Many challengers subsequently evolve from this, as we shall see, to one of the other types of challenger narrative.

2. THE PEOPLE'S CHAMPION

The People's Champion makes a very specific claim – that it is standing up for the consumer, who has been underserved, and perhaps even actively exploited by the players in the category so

far. It is fighting to succeed because, it says, in doing so the real winner is you, the consumer - and if we both join together we can overcome the cynical fat cat(s) that have been using us and the category for their own ends to date.

This is an increasingly popular stance in a number of markets around us, and we are starting to see some important variations on the overall theme, of which we will look at just a couple here. The first is where the brand takes it upon itself to stand up for the people, or a particular group of people (women, for instance, in the case of the gym chain Curves). Virgin occupies this space as a matter of course in its more successful categories: it chooses always to pick a fight with the market leader or the way the category is - and always, it says, on the people's behalf.

The second variation is where the brand is 'of the people' in a rather different sense - namely in that it presents itself as a conduit for people themselves to collectively and collaboratively solve an issue that needs addressing. Most of the Open Source and emerging 'collective creative' brands (both commercial and philanthropic) are occupying this space - the latter being brands where the consumer either comes up with, and/or chooses the answers themselves. HopeLab's Ruckus Nation would be an example of where the people create possible solutions to a societal goal - the incentivised development of a branded toy to help tackle child obesity by getting middle schoolers off the couch, where anyone can submit the winning answer.

And Linux bridges both these two meanings of being The People's Champion, in the stance it takes on giving people control over their software, in opposition to Microsoft, and in the way that it does it, through Open Source.

3. THE MISSIONARY

The Missionary challenger is very open about its desire to bring some new way of thinking to the category. This tends to consist in putting right something in the category which has, in its view, gone seriously wrong, and it talks in terms of having a 'cause' or being 'an agent of change'. So we saw JetBlue famously wishing at launch to 'restore humanity to Air Travel': believing that the cattle truck experience of US domestic flying was a betrayal of what the pleasure of flying had once been about. Kashi is looking to use the goodness of grains and seeds in cereal products to help people make changes for good in their lives – 'Seven Grains on a Mission'. It could be that the challenger believes the prevailing 'religion' in the category (and therefore in the culture if the category is an important one) is wrong – and would like to convert us to another one. Thus Dove calls shame on the Beauty Industry, and the lies and misconceptions it feels that industry peddles in order to sell its products.

4. THE DEMOCRATISER

One could argue that this is a variant of The Missionary, indeed a cross between The Missionary and The People's Champion. But it is such an important role, and the brands that have built their business model around this stance have had such a profound impact on their categories and the other brands around them, particularly the more expensive ones, that it has to take a place in the typology in its own right.

'Once and forever, we have decided to side with the many', wrote Ingvar Kamprad, in 'The World is full of Opportunities', an

internal guide for IKEA employees. The Democratiser believes in taking not from the 'rich' and giving to the 'poor', but taking from the 'few' and giving to the 'many' – opening up the beauty of great design, or the latest catwalk clothing, or the ability to become a broadcaster or news editor, and making it available to everyone. Sometimes this is done with an overtly idealistic flag flying above it (Current TV), sometimes without (Zara).

It is often characterised by remarkable pricing (surprisingly low or free) and/or the deliberate sharing of knowledge that was previously only known by a few.

5. THE IRREVERANT MAVERICK

Red Bull started, in effect, as a Killer App (see below). A caffeine and energy hit in a cold drink like nothing the market had ever seen before, the initial grassroots marketing targeted usage occasions and user groups where this would be indeed a Killer Application – the nightclub and party scene. If you wanted to stay up all night, a vodka and red bull or six would see you right.

But as the brand image developed, our understanding of this brand became more three dimensional. With its off-centre experiential events such as Flugtag and its irreverent sponsorships (sponsoring the first person to successfully fly the English channel without an engine) we have now come to understand the 'Irreverent Maverick' stance it represents and wraps around the product much more clearly. And of course since Red Bull, more than 150 new contenders have thrown their hats and their products into the energy ring, many matching to a greater or lesser degree the performance of the Austrian brand's product. Had Red Bull remained a killer product on its own, it would never have survived.

The Australian bag company Crumpler is another that is quite clear that the Irreverent Maverick is the stance it is taking and championing – ‘Crumpler bags’ it proclaims, ‘are for acts of international peace making and piss taking’¹.

6. THE ENLIGHTENED ZAGGER

The Enlightened Zagger is deliberately swimming against a prevailing cultural current. They are not simply zagging while the world zigs for the hell of it: one of the key differences between this and the previous one is the ‘truth’ that the Enlightened Zagger reveals to us as to why they are what they are. Very often this truth is something along the lines of ‘the world has gone mad in this particular regard, and I am calling the world out on it’. It is not behaving as a missionary, in the sense that it does not have any sense of higher moral purpose or stature. It is simply saying that ‘I know a lot of the world seems to think this is OK, but in reality it’s BS, and I am calling it out for what it is.’

This stance is a common one in beer challengers, particularly when linked to a blue collar/ low status positioning. At the time of writing, Miller High Life is currently showing a campaign in which one of its representatives is pulling its supply of Miller High Life out of a fancy French restaurant which is serving hamburgers at \$11.50; the rest of the world may have sleepily allowed the price of a burger to get this ridiculous, but Miller High Life is a brand that knows nonsense when it sees it, and is going to do something about it.

This stance is sometimes a position one actively needs to adopt when the category is in fact predominantly moving away from you. So, as we saw earlier, as the UK beer market continues

¹Source: <http://www.powerhousemuseum.com/collection/database/?irn=9793>).

to move away from bitter tastes towards lighter and colder lagers, Hobgoblin Ale challenges the public with 'What's the matter, lagerboy? Too much taste for you?'

7. THE SMALL, REAL AND HUMAN CHALLENGER

At some level one of the qualities that many challengers share is the ability of the consumer to get a sense of the people behind the brand. They appeal to us at a more personal level than the market leader partly because they are making a human-to-human connection, rather than a brand-to-consumer connection. And the tone of voice they adopt reflects that.

But with this particular challenger stance the real, human presence of the people behind our challenger is made much more explicit, in nature and implications. By being very explicit about the people behind the brand, their highly emotional relationship with the creation of their product, and sometimes their ambitions, the challenger looks to create more than simply a more personal emotional connection, valuable though that is. It also implies a much greater emphasis on personal commitment to quality and service: one is given a sense that there is a small and idealistic group of people fighting to bring you something new and good and special, rather than a faceless production factory with a glossy brand front doing something simply in order to maximize shareholder profits.

Very often there is a handwritten, handmade feel about these kinds of brands and their communications. Kiehl's, Sam Adams, and Ben & Jerry's would all be examples of brands using this kind of stance as a key narrative.

The tone tends to be either playfully conversational, or ardent and passionate.

8. THE VISIONARY

What is the difference between the visionary and the missionary? The missionary is looking to put a newer, better 'religion' within the category. The visionary, on the other hand, is not setting its sights on tackling something that is wrong within the category – it is actually seeing what it really offers and represents as in fact transcending all the more 'mundane' ways in which the category currently thinks and talks about itself.

So when, for example, the emerging Starbucks in the 90s talked about 'The Third Place' as being that place in your life (between home and work) which is where you spiritually recharged and re-inspired yourself, this was no longer about a mission to put a better cup of coffee on America's table. This was a transcendent vision about the benefits of their experience and what it really represented in people's lives.

More recently Zipcar and Whole Foods would be examples of visionary challengers – Zipcar through its desire to replace car ownership, rather than simply offer a different way of renting them, and Whole Foods through its 'Declaration of Interdependence' – a sense that a retailer (and all of us) needs to have a higher view about the relationship with and between 'Whole Foods, Whole People and Whole Planet'.

9. THE NEXT GENERATION

It may be thought that positioning oneself as 'the Next Generation' is simply an executional tactic, and doesn't really merit a place in any kind of overview of challenger strategic stances at all. But there are specific circumstances which can make this a very strong strategic option for aspirant challengers.

So we might see challengers looking to use this kind of positioning to profit from, and perhaps accelerate, underlying improvements in its performance as well as shifts in the market context. So Eurostar can now position itself against the airlines as ‘the future of European Travel’ – because of its improved travel times as well as its carbon impact being so much lower.

Sometimes the market leader is so popular that one may not be able to challenge it head on. With Silk Soymilk, for instance, effectively taking on milk itself, faced the problem that this was not a market leader that consumers wanted to see deposed: people love milk (full though it can be of mind boggling stuff). One can try to reframe and deposition milk in all kinds of ways, but consumers don’t want to hear it criticized directly. So adopting this kind of challenger narrative - being ‘the new milk’ - is perhaps the only one open to Silk here.

In the same way in Asia, where status is prized, and very often the Market Leader admired and valued precisely because it is Market Leader, it may be very difficult to take on the Market Leader directly. Far better to implicitly suggest the Establishment Leader is a fine thing – but for the previous generation of needs, or lifestyle, of people; adopt a ‘Next Generation’ narrative, and as the challenger deposition it without overt criticism.

Not ‘the king is dead, long live the king’; challengers are not rulers. But perhaps ‘the king is dying, long live the heir’.

10. THE KILLER APP

The Killer App is, as we know, what in the high tech world is the new, improved application that will grant immediate superiority to the person who has it and deploys it first. It is, if you like,

the twenty first century equivalent of the Better Mousetrap. Challengers who adopt this stance are doing little more than relying on the sheer superiority gap between what they offer functionally in a product or service and what went before.

Skype is a good example of this. Astonishing product? Certainly. Great brand? Not yet.

11. THE GAME CHANGER

This differs from 'The Killer App' in that, while The Game Changer certainly is offering a significantly different service or product experience, it is wrapped up in a differentiated brand offer and positioning as well. Lush is a good example of this difference – certainly Lush's oversized, brightly coloured, highly scented products are very different to the rest of the category, but this alone is not what makes Lush successful. The playful persona wrapped around its unique products, with the cues it has taken from the freshness of the delicatessen, creates an emotional relationship with the brand entirely different from that of any other bath or cosmetic product on the market.

Similarly Nintendo's Wii offers a hugely different gaming experience from X-Box and PlayStation, but the character and personalisation it adds into this experience (Miis, for instance), and the innovative way it markets itself (the partnership with Norwegian Cruise Lines) and develops applications (Wii Fit), add greater richness and further dimension as a brand to this product difference.

12. THE VALUE CHANGER

If you wish to be a challenger pursuing a value play, rather than simply a cheap second tier brand, the nature of that value change is obviously central: one can either simply signal the price gap, and make it significant ('The same for much less' – a typical private label proposition, before the better retailers became brands themselves), or one can have a small degree of difference in price but a greater overall value to the consumer riding alongside that ('More for less') – more features for less money on an electronic product, for example.

Clearly there are versions of this which are genuine 'better value' offers, and others which are perceived 'better value' offers – where the challenger is essentially inviting consumers to question whether they actually need the additional level of product or service quality they are paying for. So when Motel 6 pitches itself against more expensive hotels, and claims that all rooms look the same when you are asleep, it is not of course genuinely claiming to be the same level of quality for less; it is instead challenging you to question whether you really are in much of a position to need or appreciate what you are paying for in those more expensive hotels, since you spend so little time actually being in a position to take advantage of it.

BEING CLEAR ON YOUR MAIN STANCE

The stances challengers take are not always quite as 'clean' as this would suggest – we clearly see positions being taken from time to time which combine two of these different elements: a core stance being coloured by combining it with elements of another stance. But the virtue of teasing them apart for us at this stage is to invite us to think clearly about where our main stance will be, and where our energy and dynamism will come from as we put our Lighthouse Identity out into the market.

The British mobile provider 3 is an example of a would-be challenger that in fact has turned out to be a Paper Tiger. It started as an apparent Game Changer, but without the genuine product experience that consumers felt really delivered against such claims. It has then fluttered all over these different kinds of stances like a hummingbird, hovering briefly and without conviction near each narrative before darting on for a similarly brief period of time to a completely different one.

Even though we may evolve, even though we may choose to combine two of these basic kinds of challenger narrative for the chassis of our own position in the marketplace, it is critical to be clear about which we are adopting, and to cleave to that stance for a substantial enough period of time for it to be understood, both inside and out.

IMPLICIT VS. EXPLICIT

One of the key variables within each of these stances is how explicit or implicit is their position regarding the market leader, or the rest of the category. This obviously is rooted in the nature

of the challenge that is at your centre (Chapter 5), and whether you are choosing to be a brand of opposition or proposition. In some of these stances an overt reference to the Market Leader is de facto necessary (The Scrappy David, The Value Changer). In others the Market Leader is often ignored because inherent in the stance taken is the notion that they have simply become irrelevant (The Game Changer, The Visionary).

In most of them, though, there is a key strategic choice for us to make about whether the strategy is going to be Implicit or Explicit in whether it calls out the Market Leader (or the rest of the category) in some way. In our illustrative examples we can see challengers productively doing both.

THE RELATIONSHIP WITH THE EIGHT CREDOS

What each of these stances represents, in effect, is the narrative coming out of our Lighthouse Identity: the way we are going to use it publicly to make the target sit up and take some notice of us. Make them understand why it really matters to them. It will obviously come out of - and be a way of expressing - what we stand for, and as a stance be uniquely coloured by that sense of ourselves.

And it will be one of the filters for helping us decide how to use Thought Leadership and Communication ideas, for example.

DYNAMIC STANCES - THE FIVE ELEMENTS OF NARRATIVE EACH CONTAINS

Clearly, if we are to make these stances of interest to anyone more than just ourselves, then they have to be dynamic – they have to move the narrative of the category forward, and indeed ideally move the personal narrative of the consumer forward; this is one of the reasons it is worth being specific about the emotional benefit to the target market.

And each of these challengers has a story embodied in this stance. There is an inherent tension and conflict which gives it its human interest to us. So let us briefly explore some key components of narrative and see how they might be useful to us in developing our chosen own stance coming out of our Lighthouse Identity, and the challenge that lies at the heart of it. They are part of a joint exploration of this theme for challengers with Brian Lanahan, an expert in applying the principles of story to brands.

So what are the key elements of narrative and stories? Let us look at four that will be key to us in thinking about our chosen stance:

i) Unexpectedness

The essence of a compelling story is that its narrative is one where life goes in a different direction from the one you expect. Let me quote Brian Lanahan:

‘In story we concentrate on the rare moment when the world reacts in a way we did not expect. That’s when life gets interesting... Stories that demand our attention never focus on the banality of life conforming to expectation.’

Clearly this will need to be the case with any challenger in a category: the market leader succeeds by the category continuing to evolve in the way you would expect, given the drivers, codes and conventions that the Market Leader has educated us to think are the most important ones for us to consider. So in itself any challenger must introduce a new narrative, a new story, where the consumer is invited to think of the category as progressing in an unexpected way.

So what is the ‘normal’ evolution of the category? What is the unexpected course we are looking to take it in? Why should that command their attention?

The Inciting Incident

When you see challenger founders interviewed, one of the subjects that always comes up is why they started doing this new and fresh thing with this new and fresh challenger brand. Usually it relates to a very personal thing that happened to them –

a frustration that they had (James Dyson's frustration with his own vacuum cleaner), or something inspiring that had happened to them (Flickr's founders suddenly seeing the real potential of their game application). This is known in narrative as 'The Inciting Incident' – the moment that causes the people involved to start the brand or change its direction, and thus makes the story of what it is trying to achieve uniquely theirs.

ii) In our case, if we are founders, we may well have such an inciting incident – an 'Aha!', or a 'There must be a better way of doing it than this' – and in this case it will simply be a question of putting that at the centre of our story. For most of us, as people working to launch or relaunch brands within larger companies that are not our own, we will still want to find an inciting incident – whether by going back to why the brand was originally started, and reinterpreting what the inciting incident for its birth had been, or through a moment of personal recognition that something was wrong with the world, that something needed to be done about it and the role our brand could play in that. Some truth about why we embarked on our current new course, that makes it more than just this year's new positioning. Why are we a challenger? What has set us on this course? What is the moment we can point to, that has shaped this stance, and direction?

iii) The Objective – the desire created by the incident

The protagonist in a compelling story – in our case our challenger – has to be driven by a personal desire, ideally coming from this inciting incident, an objective that propels them forward. They want something to happen, they want to achieve something

specific, and this has to be visible to us, the spectators (or perhaps at some level participants) in the story.

To quote Lanahan again, 'We need to really feel what the character wants, and it has to be worthwhile. Boredom in a story is watching a character pursue an objective that is too easy or without meaning.' Remember Tom Chappell of Tom's of Maine? 'You have to define yourself (as a brand) based on a point of view you care deeply about'.

So perhaps when we talk of having a visible cause that you are rallying around, it is not a piece of marketing gimmickry – it is in fact a fundamental part of creating a challenger narrative that we can all be engaged by. If we want people to engage with us as a challenger, we have to be pursuing something more than brand share alone.

So what is it we want to achieve, or change as a challenger? How is this visible to those who are watching us? How could we make it more so?

iv) Conflict

All good stories are driven by conflict – not necessarily (or indeed usually) in the sense of fighting, but in the sense of struggle. The protagonist faces one or more key adversarial forces against which he/she must struggle to realize his/her desire. If there is no conflict in a story, it doesn't move forward. And the way they deal with that conflict or struggle is where their true character is revealed. The challenge that the challenger publicly chooses as being their reason for being in a market is exactly this struggle; it is and will be the source of energy for their narrative and how we engage with it.

So let's be clear, then: what are we struggling to overcome to realise our ambition? What is standing in our way?

USING THESE FOUR ELEMENTS TO SHARPEN OUR INITIAL STORY WITHIN OUR CHOSEN STANCE

Three of the four questions above (What is our desire/ objective? What is unexpected about it? Where is the conflict in it?) are inherent within each of the stances set out at the beginning of the chapter; we are asking them here simply to ensure we are as clear and sharp as we need to be in setting out our stall.

And they will also help shape our backstory for those who choose to participate and engage with us more deeply (our fans, our community). Challengers are storymakers – we have seen that they consistently do things that get people to talk about them. Some of this conversation will be about the nature of the action itself, and a smaller but significant amount will be prompted by curiosity: Why are they doing the things they are doing? What more can I find out about them?

EVOLUTION AND MOVEMENT ACROSS THESE DIFFERENT CHALLENGER STANCES

Each of the stances above represents, then, a different kind of challenger story to tell. Within each of them they are in effect telling us why they started, and what they are trying to do. We come to know what they are struggling against, and who their enemy is. In some we even get a sense not simply of their beliefs, but of their hopes and their fears – for themselves, for their category, for the world at some level, and for us. The anthropologist Bob Deutsch commented that people often thought that Bill Clinton’s success with the electorate, in spite of the various scandals that attended his presidency, persisted because people just liked him;

Deutsch’s observation was that this was not actually the case – that the reason his success persisted was not because they liked him, but because people felt he liked them. The same is true with many of our challengers: we feel at some level they like us. We are not just target markets and demographics and share objectives - they share their stories with us, and invite us to participate with them in realizing them.

And if we look not just within one particular stance but across the range of them, we can see how some of the more celebrated longer term challengers have been successful in achieving longevity by changing, or perhaps actively evolving their narrative across two or more of these types of narrative stance over time.

So in the airline business, one can see the evolution of Value changers into different, stronger stances as they gain their confidence, consumer base and grow. So Southwest moved from being, in effect, just a low fare airline to talking about ‘Giving America the freedom to fly’ – a Democratiser, opening up to

Americans of all income groups the ability to use air travel. Virgin Atlantic started as a 'More for Less' Value changer, moved through an Irreverent Maverick phase (capitalizing on the existing Virgin image) and has in effect evolved to take a People's Champion stance (the overall positioning is that of 'Robin Hood' – taking from the rich and giving to the less wealthy). It is still irreverent, of course, but it has looked to take a higher minded position.

Apple has moved from Game Changer (with the Apple 2) to David (1984), to Irreverent Maverick (a user image Mac users sustained for themselves even during the lean product years after Jobs was pushed out) to Game Changer again (iMac, iPod, iTunes, iPhone). Is it in fact a challenger at all any more? One could argue that the iPod advertising is in effect now simply the market leader advertising the category generic, and owning it through the white iconography. Yet as it pushes beyond the core businesses, it is of course challenging both its new categories and all the drivers and codes of those categories all the time.

So why do challengers move between these stances? What is the benefit? In part it is about refreshing the way one presents oneself to the consumer – stopping yourself becoming just another part of the brand landscape once the consumer has become familiar with you. In part it is about discovering new and fresh sources of challenge and conflict from which to renew your own story, and create fresh sources of 'Grip' on the imagination of the consumer. And there may also be in fact some more significant kind of evolution here – one might argue that some of these stances represent 'higher order' positions that challengers naturally evolve up to.

But underpinning all of these is perhaps the key requirement for a challenger, namely to be never seen to win.

As one succeeds in achieving one goal, or overcoming (really or apparently) one struggle, one evolves one's narrative, and public ambition, and moves onto the next. Being a challenger is about a state of mind, not a state of market.

FINAL THOUGHTS

This article does not represent a Credo in itself – its purpose is really about how to maximise the interest to the consumer of the Challenger Strategy that has emerged for you from thinking and applying the credos outlined in *Eating the Big Fish* to your brand and its challenge.

There are two myths about challengers. One is that it is all about David against Goliath, the little guy against the big guy; the second is that it is all about being the Outlaw – edgy, irreverent, young. So the second purpose of this article is to show how, while each of these are indeed possible stances (the Outlaw is in effect the same as the Irreverent Maverick), they are by no means the only stances open to a challenger to succeed. And understanding the broader possibilities may also be one way we can consider evolving as a challenger from the stance that gave us initial success.

Finally, that there are twelve different stances above does not make this an archetypal map by any other name: some of the stances above can appear in two or three different sectors of the archetypal map. Those interested in the relationship and differences between these stances and archetypal work can find it discussed in a separate paper², the result of thinking and work done with SAB Miller.

²email eve@eatbigfish.com to request a copy

ABOUT EATBIGFISH

eatbigfish[™] is a small catalytic brand consultancy which specialises in applying challenger thinking to companies and brands who want to think like challengers themselves. This thinking, process and tools are based on the Challenger Project[™], a continuously evolving study of Challenger Brands across a wide variety of categories. Our published books **Eating the Big Fish** and **The Pirate Inside** are one of the the outputs of this ongoing process. Our approach utilises facilitated workshop-based programmes: we believe in working with a cross-fuctional senior client group and their primary business partners to help them arrive at their own solutions.

Our clients have included Lexus, IKEA, Unilver and PepsiCo.

If you'd like to learn more about the **Challenger Project**, **Pirate School**[™] or **eatbigfish** please contact us

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