

成為具顛覆性品牌的秘訣是什麼?別再成為受害者

文 | Douwe Rademaker & Ben Joosen, Ipsos

編譯 | Claire Tseng, 益普索公關行銷專員



隨著品牌在轉型的世界中掙扎求生，品牌經理經常會問：這些變化背後的驅動力究竟是什麼呢？我們應當注意哪些變化呢？我們又該如何反應？這些都是需要關注的問題，但也不全然是唯一需要詢問的問題。我們認為行銷人員也必須捫心自問：

- 在我的品牌類別中什麼樣的改變具有真正的破壞與顛覆性？
- 我的品牌是否帶動了產業的突破？若是這樣，究竟引發了哪些突破性的改變呢？
- 若沒有帶動產業的突破，我們該如何運用品牌或產品組合來應對突破性的改變與變化呢？

為了探討品牌所面臨的挑戰以及行銷人員如何在破壞的環境中因應這些問題，我們向三十幾個分佈於全球的客戶提出這些疑問。我們的客戶涵蓋了各行各業（包括食品和飲料、美妝、醫療保健、汽車、煙草、電信、速食和零售），總結多數客戶的回覆所得出的結論是，無論哪個類別品牌所歷經的破壞都非常雷同。另一方面，就算品牌在同類別中競爭，每個品牌對於破壞所產生的回應都截然不同。

在接下來的幾頁中，我們將進一步分析客戶提供的回覆，包括消費者在轉型世界中所扮演的重要角色和益普索的觀點 - 品牌是否為一個顛覆者取決於公司的內部策略如何因應這些改變。品牌是否有能力改變它們所屬的類別，努力的換位思考，或是透過員工來促進改變呢？

數位化和競爭是兩大顛覆者：

當詢問客戶在他們的品牌類別中所面臨最具破壞性的變化為何時，客戶的答案不外乎是數位化 (digitalization) 和競爭 (competition)。

數位化成為一個顛覆者並不令人意外。數位化涵蓋了電子商務，線上與線下的整合，新的應用程式、服務和接觸點，和使用社群網路來與消費者建立關係。下面我們引用幾個客戶的看法：

- 數位化影響了整體業務包括產品開發、溝通、和行銷 - 全球美妝客戶
- 數位通路的發展將徹底地改變執行與管理的方式（例如，沒有通路限制並提供新型態的個人產品等） - 零售客戶
- 數位化環境與社群網路使客戶意識到品牌的力量，並可以同時將好的與壞的意見和經驗傳遞給他人，其對價值和品牌忠誠度的要求也變得更加苛刻 - 速食客戶



顛覆者的競爭變得越來越有趣。無論是來自哪個行業的客戶都將競爭視為他們產品類別中最主要的顛覆者。現在的競爭來自多方，包含本土品牌、利基品牌和通路自有品牌（如亞馬遜 Amazon）。我們的速食客戶提到：一個主要的顛覆者「是一個新的參與者，即使初始的規模並不大，它能在短時間內和預算極少的情況下產生龐大的影響力。他們透過新媒體和社群網路快速地與消費者建立關係。」

另一位客戶證實了這個現象：「消費者的選擇只會越來越多。幾年前，建立一個品牌並觸及客戶需花費多年時間；但現在只需幾個月的時間即可完成」。這當中可能存在著回彈效應 (boomerang effect)。百威英博集團的全球洞察總監 (AB InBev-Global Insights Director) Fernando Bayeux 表示：「消費者正在尋求真我，並尋找對他們有意義的小眾品牌」。換句話說，在全球化的世界中消費者將回歸到那些更接近自我的品牌。

繼數位化和競爭後，我們的客戶將以下幾項列為主要的顛覆者：

- 新的行銷通路（幫助小品牌更容易被取得）
- 新法規（例如食品、酒精飲料、煙草和醫療保健行業）
- 健康和保健趨勢（影響商業流程和利潤）
- 促銷/定價（消費者希望降價並等待促銷時購買）

那麼，接下來的問題是：*我們的客戶如何應對這些破壞性的變化呢？*

品牌會促使這些改變嗎？

當提及品牌是否帶動任何產業的突破，約有一半的採訪客戶認為他們有產生突破性的改變。那麼，他們究竟做了什麼讓這些客戶認為他們的品牌是顛覆者而不僅僅是反應者呢？

整體來說，最具顛覆性的品牌會制訂品牌策略並跳脫傳統的思維框架。以下為一些公司跳脫類別舒適圈所採取的一些實例。



實驗

優步 Uber 透過優步貨運 (Uber Freight, 遠距離的貨物運輸) 和未來即將推出的優步空中飛行載具計劃 (Uber Elevate, 短程空中載客) 來提供人與物間的自動移動。優步指出: 「為了不失去優勢或被拋在後頭, 我們不斷地嘗試」。

實驗不僅限於產品, 也可以應用於行銷、銷售點終端機 (POS) 和商業模式。例如, 一些新品牌運用大膽的商業模式, 並著重於先獲取滲透 (penetration) 後再賺取利潤。

組織改革

戴姆勒(Daimler)不再只專注於汽車, 而更專注於「直覺行動力」(Intuitive Mobility)。另一位汽車客戶提到, 我們正從長期的產品模式 (long-standing product-based model) 轉為以客戶體驗為主的模式 (experience-based model)。

建立實驗室 (incubators)

許多具破壞性的客戶成立實驗室, 以開發新產品和業務來滿足消費者的新需求。例如, 萊雅的科技實驗室 (L'Oréal's Technology Incubator) 的運作模式如同一間新創公司, 目標是透過產品開發來成為美容產業中的先驅。最近發表不用電池的 UV 智慧穿戴感應器 (UV Sense), 透過佩戴在指甲上的小巧設計, 可偵測皮膚在紫外線下的曝光程度。AB InBev 成立了 ZX 投資公司 (ZX Ventures), 一個注重全球成長和創新的團隊, 任務是負責開發能滿足消費者新興需求的新產品和業務。

與專家合作

為了運用社群媒體來與客戶建立關係, 以了解客戶偏好的改變並不斷地提供優惠。我們的客戶 Zena 是一間西班牙的連鎖餐廳, 他告訴我們: 「我們在數位化環境和社群網路中招募人才, 並將他們的意見採納到品牌中, 我們也努力且仔細地聆聽他們的聲音」。我們另一個快速消費品的客戶提到: 「為了持續成為產業龍頭, 我們採納健康營養專家的建議」。

但並非所有我們採訪的品牌客戶都認為他們驅動產業類別中的破壞。這些公司試圖利用品牌、投資組合, 或在行銷方面取得更大幅度的進展。例如, 客戶可能通過收購小型科技公司來提升數位化能力, 從而提升品牌價值。他們也可能會在電子商務網站上銷售他們的產品。又或者, 品牌可能轉戰到其他類別 (例如, 某一位品牌客戶將加工肉品類擴展到蔬菜類, 並迅速地建立

信賴度)。但只做這些可能還不夠。益普索的一位食品客戶表示：「有時候通路自有品牌更具破壞性。」



“
We recruit people in the digital environment and social networks and incorporate their input into our brands. We try to be attentive and activate the listening.

我們在數位環境和社群網路中招募人才，並將他們的意見納入我們的品牌。我們也努力且仔細地聆聽他們的意見。

-Zena 西班牙連鎖餐廳

Zena
Spanish chain restaurant

成為顛覆者的關鍵：控制權在哪裡呢？

領導者和追隨者間的差別是什麼？這跟公司對於誰控制或引領破壞的看法有關嗎？

我們的觀點是，適用於所有的市場與產業類別的三個轉型根源為：人(people)、科技(technology)和環境(context)。這三個元素必須同時存在，缺一不可。

1. 人：人以各種不同的方式改變市場。新世代擁有新型態的價值觀（例如，千禧世代與嬰兒潮世代的價值觀不同）；持續增加的中產階級也正朝著城市遷移，因此，擁有汽車或房屋的願

望變得不那麼重要；長壽成為新的願望因為長壽等同於退休後能展開新的生活，並進而影響休閒娛樂活動、運動、食物和假期。

2. **科技：**隨著新科技和科學的發展，產品服務變得越來越複雜且多元，不僅僅提供消費者不同的體驗，還給予公司塑造形象的機會。例如，消費者已經習慣自動化生產的食品、保健品、美妝品和汽車產品。這導致了反向開發：產品以最真實的方式生產（回歸到基本面），並迫使公司重新思考他們的產品組合。
3. **環境：**新環境將創造出無論是由經濟、政治、或資源等新的可能或新的界限來驅動改變。例如，煙草、酒精、醫療保健和數位化服務等類別正面臨新法規，驅動這些類別改變他們的產品，在某些情況下，需要重新思考他們的核心業務。

公司無權管轄轉型。每個公司和每個品牌都將受到影響。無論行銷組合或策略多麼地完善或多麼複雜，最終仍然探討：作為一家公司，您是否相信您能驅動改變？

我們相信公司的成功取決於是否看見改變其產業類別的力量，無論他們是否有能力掌控這力量。我們必須記住，公司是由一群人組成。從個人的角度來看，內控 (internal locus of control) 代表了相信你相信你能掌控自己的生活，相反地，外控 (external locus of control) 代表了相信你相信外在力量決定了你的生活，你也無法掌握發生在你身上的事。控制點 (locus of control) 不僅僅與您採取的行動有關，也與你如何應對信心 (reinforcement) 和失望有關。當你發現你對於行動結果沒有產生影響或僅產生些微的影響，你就不傾向改變你的行為如增強信心（行動後的好結果）或產生失望（行動後的不良結果）。這種現象在心理學上被稱作控制點理論。例如：一名網球選手在比賽中輸了，擁有內控人格的人會認為輸球是自己的問題，如自己表現不如預期或球技有待加強，而擁有外控人格的人，則會將輸球怪罪到比賽設備不完善等其他外在因素。如果這些原則能在個人生活中能發揮作用，那為什麼在職涯中就不能呢？且公司是由人所構成，公司不是也應該將受到影響嗎？

科學研究表示：控制點與公司業績相關。領導者的控制點與公司的生產力和收益能力有關，也與員工滿意度相關。此外，公司員工如何看待公司內部文化將影響他們對於控制點的看法。當一間公司擁有更多的創新、更願意冒險、更注重結果，員工將會感受到他們擁有自我控制的能力，並願意實踐更具前瞻性的行為(forward-looking behavior)。

控制顛覆性：

行銷人員如何控制他們的市場並帶動產業類別中的破壞而不是僅僅被動地做出反應 - 那麼，如何對他們強化內控性格呢？以下為一些建議：

1. **貼近您的消費者：**了解如何在多變的環境中持續保持關聯。人們在尋找什麼樣的體驗？如何讓您的品牌脫穎而出？如何與消費者建立關係？百威英博集團的全球洞察總監 Fernando Bayeux 表示：「各個國家面臨著不同階段的破壞與挑戰。消費者對於顛覆性品牌的看法是什麼呢？為什麼這些新品牌比客戶原來所知道的品牌來的‘更酷炫’呢？」這些都是無法回答的問題 - 因此，品牌必須與消費者保持關聯並持續貼近消費者。
2. **敢於擁抱新的可能性：**促使您的公司在核心業務或流程上跳脫傳統思維的思考。一些汽車公司將自己定位成移動公司(mobility company)，而非汽車製造商；另一些則成立了獨立的

專門團隊來發展新想法。這將有助於了解如何發掘並開發新解決方案以取得更多的成功，而不是只在現有產業類別中找尋機會。

3. **創造成長的文化：**人們應當對結果負責。培養和激勵他們學習一般技能來讓他們承擔風險；不要過分聚焦僅能在特定工作環境中使用的狹隘知識或技能。通過範例來闡述，獲勝的這些公司內部化了他們的控制點並設定轉型標準。這些公司不但不追隨改變反而引領潮流。另外，也可以考慮推動一些具實踐性質的小改變來觀察團隊的反應，並開啟各種挑戰來讓團隊解決。這促使公司適應頻繁的變化並擁有具創造性的思維。這不僅僅可以激發更多的創新，也可以在面臨外在挑戰時更靈活的思考。

總而言之，不要再成為顛覆性品牌中受害者。掌握轉型才能塑造你的品牌與產業的未來。

Ipsos 益普索市場研究

Ipsos是全球頂尖的專業市場調查研究機構，在世界各地八十九個國家設有分公司，在挖掘顧客經驗，執行品牌行銷調查，我們具有創新的思維與先進的科技。我們是世界頂尖企業執行長最信賴的企業顧問，我們也有熟悉各產業的專家協助測量、模擬和管理顧客與員工關係。

更多的資訊，請參考 <https://www.ipsos.com/en-tw/solution/overview#category3>

或洽詢我們的研究團隊

執行總監 Ruth Yu 于泳洳

02 2701-7278 ext.130 Ruth.yu@ipsos.com

研究經理 Tina Liu 劉玉婷

02 2701-7278 ext.160 Tina.Liu@ipsos.com

The secret to unleashing a disruptive brand? Stop being a victim

Douwe Rademaker & Ben Joosen, Ipsos



As brands struggle to survive in a transforming world, brand managers often ask: What are the driving forces behind these changes? Which changes should we pay attention to? How should we react? While these are interesting questions, they are not the only questions to ask. We believe it is imperative for marketers to also ask themselves:

- Which changes in my category are truly disruptive?
- Is my brand initiating any of these disruptions? If so, in what sense?
- If not, how am I harnessing my brand or portfolio against these disruptions?

To start a conversation about the challenges brands face in a disruptive world and how marketers are addressing these challenges, we posed these questions to 30 of our clients around the globe. While our clients work in a variety of industries (including Food and Beverage, Beauty, Healthcare, Auto, Tobacco, Telecommunications, Quick Service Restaurants (QSR), and Retail), many of their responses to the disruptions they are seeing in their categories were quite similar. On the other hand, their responses to how their brands are approaching disruption were quite different – even when they played in the same space.

In the following pages, we will share with you the feedback we received from our clients – including the critical role that consumers play in our transforming world – along with our point of view: that whether a brand is a disruptor or not depends on the company's internal strategy to manage change. Do they take ownership of transforming their category, strive to think differently, and set up their people to drive change...or not?

Digitalization and competition are the biggest disruptors:

When asked about the most disruptive changes in their category, our clients most often cited *digitalization* and *competition*.

Digitalization as a disruptor comes as no surprise. It encompasses e-commerce, the merging of the online and offline worlds, new apps, services and touchpoints, and the use of social networks to connect with consumers. Here is what some of our clients had to say:

- “Digitalization affects the entire business: product development, communication, distribution.” – Global Beauty Client
- “The move towards digital sales channels will fundamentally change how category management is performed (i.e., no aisle limits, new personalized ways of offering products, etc.).” – Retail Client
- “The digital environment and social networks make the customer aware of his power by transmitting their opinions and experiences to others, both good and bad, and he has become more demanding as to what he expects to receive for his money and less loyal to brands.” – QSR Client



Competition as a disruptor was perhaps more interesting. Clients from nearly every industry cited competition from new sources as one of the biggest disruptors in their category. Competition is now coming from other categories, local brands, niche players and new private labels (e.g., Amazon). According to our QSR client, a major disruptor is “the ability of new players, even small ones, to get a big impact in the short term and with small budgets. They can create a relationship with the consumer in a very fast way through new media and social networks.” Another client confirmed this phenomenon: “The available offer does nothing but increase. Years ago, creating a brand and reaching a considerable number of customers took years; today it can be done in months.” There may also be a boomerang effect. According to Fernando Bayeux, Global Insights Director, AB InBev: “Consumers are seeking authenticity and are finding it in small brands that mean something to them.” In other words, consumers are going back to brands closer to them in the world of globalization.

Following digitalization and competition, our clients cited the following as major disruptors:

- New distribution channels (which are helping smaller brands’ availability)
- New regulations (e.g., in the food, alcoholic beverages, tobacco, and healthcare industries)
- Health and wellness trends (which impact processes and margins)
- Promotions/pricing (consumers demand lower prices and wait for a promotion to buy)

So, the next question is: *How are our clients dealing with these disruptions?*

Are brands initiating change?

When asked if their brands were initiating any of the disruptions, about half of the clients we interviewed believed they were. So, what were they doing that made them see themselves as disruptors and not just reactors?



By and large, the most disruptive brands developed a strategy that enabled them to think outside of the box. Here are some of the approaches these companies took to get out of the comfort zone of their categories.

Experimentation

Uber initiates autonomous movement of people and things by offering, for example, Uber Freight (movement of goods across longer distances) and the upcoming Uber Elevate (movement of people for short hops via air). According to Uber, they “continuously experiment to not lose their edge or to be left behind.”

Experimentation is not limited to products. It can be applied to distribution, POS, and business models as well. For example, some newcomers are applying a daring new business model that focuses on acquiring penetration first and making a profit later.

Transforming the organization

Daimler is not about cars anymore, but about ‘Intuitive Mobility’. Another automotive client told us that they are now moving from their long-standing product-based model to a customer experience-based model.

Creating incubators

We see our more disruptive clients setting up incubators to develop new products and businesses that address emerging consumer needs. For example, L’Oréal’s Technology Incubator is a team that operates like a start-up within the company with the goal of developing products at the forefront of the beauty industry. One recent launch was UV Sense, a battery-free wearable electronic that provides consumers with individual information of their ultraviolet (UV) exposure through a small design worn on the nail. AB InBev launched ZX Ventures, a global growth and innovation group within the company whose mandate is to develop new products and businesses that address emerging consumer needs.

Working with experts

To leverage social media to connect with their clients to understand their changing preferences and flex their offer continuously, our client Zena, a restaurant chain in Spain, told us, “We recruit people in the digital environment and social networks and incorporate their input into our brands. We try to be attentive and activate the listening.” One of our clients in CPG said: “We adopt the recommendations of health nutrition experts” to stay at the forefront.

But not all clients we interviewed felt that their brands were driving disruption in their category. These companies were trying to harness their brand or portfolio or make better strides on the marketing front. For example, they might bolster their brand's value by acquiring small leading-edge technology companies to advance their digital capabilities. They may make their products available at e-commerce sites. Or, they might harness the power of their established brands by moving them into new segments (for example, one client expanded their processed meat brand into the vegetable segment and was able to quickly build credibility). Unfortunately, this might not be enough. As one of our food clients pointed out: "Sometimes private labels are more disruptive."



The key to being a disruptor: Where lies the control?

What separates the leaders from the followers? Could it have to do with the company's perception of who is in control of disruption?

Our point of view is that there are three roots of transformation that apply to all markets and categories: people, technology, and context. We acknowledge that these don't exist separately. Changes in one will give rise to changes in another: it is an ongoing spiral of transformation that sets new boundaries, creates new opportunities and requires rethinking of our businesses and our processes.

1. **People:** People are transforming markets in a myriad of ways. New generations have different values (e.g., Millennials vs. Baby Boomers); the growing middle class is moving to cities and, consequently, owning a car or a house have become less important aspirations; longer life expectancies translate into new possibilities to spend one's retirement, impacting leisure activities, sports, food and holidays.

2. **Technology:** With new techniques and scientific developments, products and services are getting more and more sophisticated, triggering not only different experiences for consumers, but also different opportunities to shape companies. For example, consumers have grown accustomed to the automated production of food, health and beauty products, cars, etc. This has given rise to a counter-development: products being produced in an authentic manner (back to basics), which is forcing companies to rethink their product portfolios.

3. **Context:** Each new context creates new possibilities or sets new boundaries, whether this is driven by changes in the economy, politics, resources, etc. For example, categories like tobacco, alcohol, healthcare, and digital services are facing new regulations that are forcing them to modify their products and, in some cases, re-think the core of their business.

These roots of transformation are outside a company's control. Every company, every brand, is subjected to these. No matter how smart or sophisticated a new marketing mix or strategy is, it drills down to this: Do you as a company have the conviction you can drive change or not?

We believe the success of a company depends on whether they see the power to change their industry within their control or not. We need to remember that companies are just a group of individuals. Think about yourself as an individual. If you personally feel you control your own life, it is said that you have an internal locus of control. If you feel you are not in control, that events happen to you, it is said you have an external locus of control. Not only is the locus of control related to the type of actions you take, but also how you react to reinforcements and disappointments. When you feel you have no or little influence on the result of actions, you will be less inclined to change your behavior following the reinforcement (good result of an action) or a disappointment (poor outcome of an action). This phenomenon is called locus of control.¹ To give an example: someone who loses a tennis match, having an internal locus of control, will contribute it to her or his own performance. Someone with an external

locus of control will contribute the loss to poor playing conditions or other circumstances. If these principles work on a personal level and in your personal life, why not also in professional life? And, as companies are made of people, aren't companies subjected to this phenomenon as well?

Scientific research shows they are: locus of control is linked to company performance. A leader's locus of control is linked to a company's productivity and profitability, as well as employee satisfaction. Moreover, how people in a company perceive the culture within the company affects their perception of locus of control.² The more the company has an innovative, risk-taking, results-oriented culture, the more people will feel they are in control and will display forward-looking behavior.

Taking control of disruption:

How can marketers take control of their market and start initiating category disruption instead of reacting to it – that is, how can they instill an internal locus of control? Here are some recommendations:

1. **Stay close to your consumers:** Understand how to stay relevant in changing times. What experiences are people looking for? What makes a brand stand out? How do you connect with consumers today? Again, according to Fernando Bayeux of AB InBev: "The challenge is that disruption is happening at different stages in countries, and even within countries. There is an unanswered question – what do consumers think of disrupting brands – why are these new brands 'cooler' than a brand they know their whole life?" In that respect, branding must stay relevant to connect with consumers.

2. **Dare to embrace new possibilities:** Allow your company to think outside its core business or processes. Some car companies position themselves as a mobility company instead of a car producer; others have set up special independent teams to generate unhindered new ideas. This demonstrates an understanding of how to detect and create new solutions and can lead to greater success than trying to find new opportunities within existing categories.

3. **Create a culture of growth:** Make people responsible for results. Train and stimulate people on general skills that allow them to take risks; don't focus too hard on narrow technical knowledge or skills they can only use within a specific work context. Manage by example. The companies that go for the win internalize their locus of control and set the standard for transformation. They don't follow change, they lead change. Think about creating small 'experiments' of change and see how the team reacts and flexes. Introduce challenges for teams to address. Acclimate the organization to constant change and creative thinking. This serves not only to spark more innovation, but also allows for more flexible thinking when larger external challenges present themselves.

In short, stop being a victim of disruption. Take control of transformation and shape the future of your brand and category.

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or contact our research team:

Ruth Yu, Executive Director

02 2701-7278 ext.130 Ruth.yu@ipsos.com

Tina Liu, Research Manager

02 2701-7278 ext.160 Tina.Liu@ipsos.com