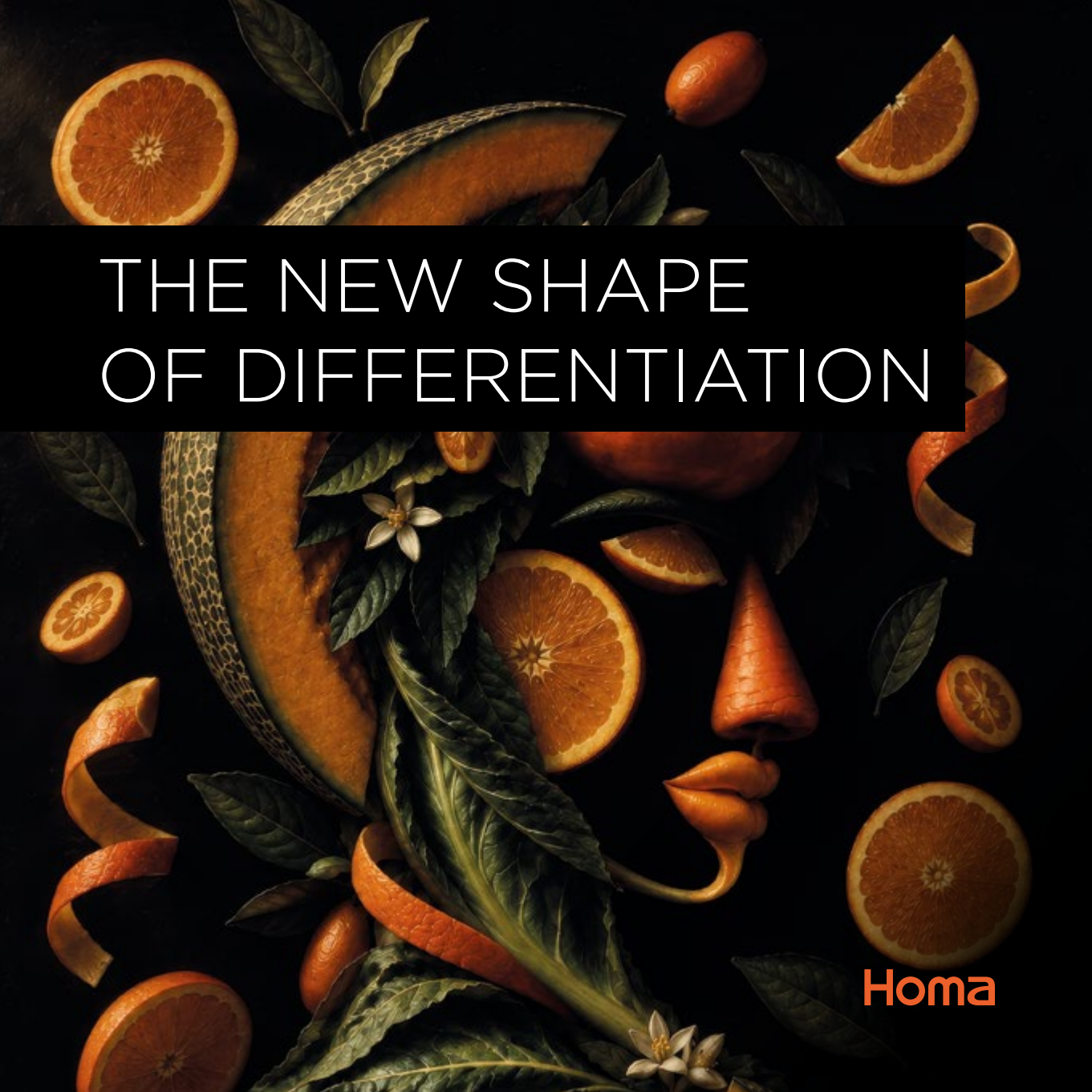




THE NEW SHAPE OF DIFFERENTIATION

Homa



Homa
WE TAKE CARE OF YOUR DREAMS

FORE- WORD



Michael Yao, CEO and Co-founder, Homa Appliances

As a pure OEM and ODM manufacturer, Homa occupies a distinctive position in the conversation around differentiation. We help dozens of client brands create cooling appliances that feel unmistakably their own, combining shared industrial capabilities with different identities, ambitions and market propositions. For us, this has always been an essential part of our role: enabling different brands to express what makes them relevant and recognisable to their customers.

That is why this topic feels particularly close to us.

As products across a category become increasingly sophisticated - and as technologies and tools, including generative AI, become more widely accessible - it can sometimes appear that differentiation is becoming harder to achieve. We see it somewhat differently. The more capabilities converge, the more important it becomes for brands to be clear about what they stand for, how they create value and the kind of relationship they want to build with their customers.

Since beginning production in 2002, Homa has grown into one of the world's leading suppliers of cooling appliances, passing the 100-million-refrigerator mark in 2022 - each one created for another brand and, ultimately, for its customers. This perspective has given us a privileged opportunity to observe how technology, design, service and brand meaning come together to make products relevant and memorable.

In the pages that follow, we explore differentiation from several perspectives we believe are particularly meaningful today: the accelerating evolution of features and technology; the meaning that can be built around a product platform; the role of service in shaping the experience after the purchase; the communities that can turn products into shared experiences; and AI itself, considered not as a destination, but as a powerful amplifier of the direction a brand chooses to take.

We hope you enjoy the read and that it offers useful perspectives on a question that is becoming increasingly important for our industry: in a world where both technology and advanced manufacturing capabilities are more widely available - making it easier than ever to create high-quality products - what will continue to make customers recognise a brand, choose it and remain connected to it?

A stylized handwritten signature in black ink, likely belonging to Michael Yao, positioned at the bottom right of the page.

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FROM THE FEATURE TRAP TO THE AGE OF SAMENESS

When everyone becomes faster, smarter and more capable at the same time, what is left to make us relevant?

8 Open two browser tabs for two competing brands in almost any category - refrigeration, insurance apps, sparkling water, sneakers - and count how long it takes to tell them apart.

A decade ago, that exercise might have taken a minute. Today, in a growing number of categories, it barely takes a glance to notice how alike everything has become: the same hero image, the same three feature icons, the same reassuring shade of blue. For years, companies tried to win by adding: a new function, a new material, a faster processor, a smarter sensor.

It worked until the addition became the norm. What began as an edge became the entry price. Once every competitor has matched every feature, competing on features stops being a strategy and becomes table stakes.

It's an old story, but it's taking on a new dimension. Products no longer converge alone. Websites converge. Social content converges. Increasingly, the tools used to imagine and produce them converge too. Welcome to the Age of Sameness: an era in which it has never been easier to produce, and never harder to be remembered.



ESCAPING THE HERD

Why matching every competitor's move is the fastest way to disappear into the crowd.

Fifteen years ago, Harvard's Youngme Moon identified a trap that feels even more relevant today: when companies relentlessly match competitors, they end up looking increasingly alike. AI has accelerated that process, making it easier than ever to reproduce the same websites, visuals and campaigns across entire industries. Yet the same technology can also become a tool for differentiation - if companies use it strategically rather than defensively.

In *Different: Escaping the Competitive Herd*, Moon argued that businesses tend to converge through two mechanisms: adding more features to existing products and multiplying product lines. Both are driven by the fear of falling behind competitors, but together they push entire categories towards the same indistinguishable middle ground. What begins as a sensible effort to remain

competitive gradually erodes the very thing that makes a brand memorable.

Her classic example remains Google's minimalist homepage. While early search engines competed by adding news, links and widgets, Google stood out by removing almost everything. Rather than asking what competitors were doing, it redefined what users actually needed. By refusing to play on the category's own terms, Google became instantly recognisable.

10 The principle extends far beyond products. Today, companies can replicate a competitor's campaign, website or visual identity in days rather than months. Generative AI has dramatically lowered the cost of creating content, but it has not lowered the cost of developing an original strategic idea. As execution becomes easier, distinctiveness becomes more valuable. The real scarcity is no longer production capacity but strategic imagination.

Early research suggests AI may even reinforce similarity. A 2026 study,

Interrogating Design Homogenisation in Web Vibe Coding (Shin et al.), found that AI-generated websites tend to reproduce dominant design conventions from their training data. As those outputs return to the web and feed future models, design risks becoming progressively more standardised. Whether the same dynamic applies across every creative domain remains an open question, but the findings illustrate how easily AI can amplify existing conventions instead of challenging them.

The consequence is that competitive advantage is shifting. For years, speed of execution was a differentiator: the brands that could launch campaigns, redesign websites or produce creative assets faster often gained an edge. As AI makes those capabilities widely accessible, execution itself becomes less of a competitive moat. Increasingly, success depends on the quality of the strategic choices behind the prompts, the clarity of a brand's positioning, the originality of its perspective and the discipline to resist copying what everyone else is already

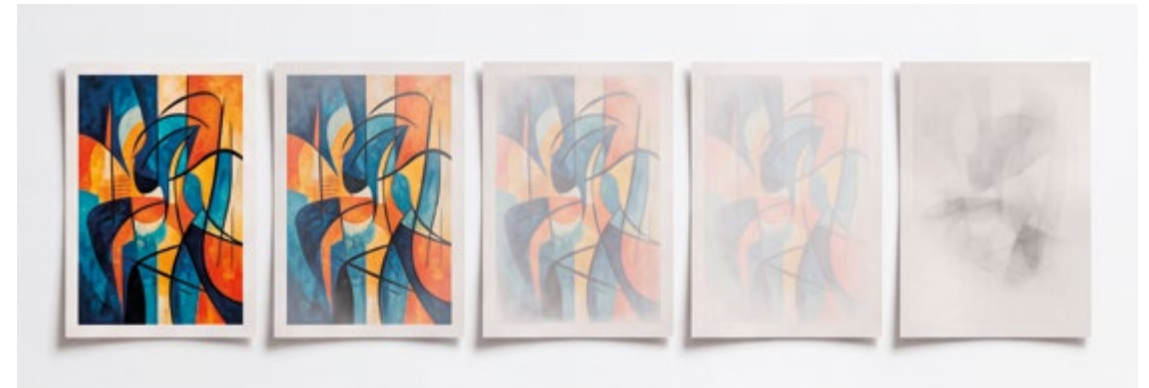
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The platform is shared. The meaning, quite deliberately, is not.

doing. This is also where AI presents its greatest opportunity. The technology can help companies explore ideas that fall outside category conventions but only if they choose to use it that way. Organisations that rely on AI to replicate familiar patterns will produce familiar outcomes. Those that use it to challenge assumptions and reinforce a distinctive

point of view can create a genuine competitive advantage. Moon's insight therefore feels more relevant than ever. AI has not changed the challenge of strategy: it has accelerated it. The brands most likely to stand out will not be those that move fastest with the herd, but those willing to leave it behind.

11



ALGORITHMIC SAMENESS

Same look, different logo

This didn't start with AI. Open enough competitor websites in the same sector and a pattern snaps into focus immediately:



Cybersecurity

Dark navy backgrounds, electric-blue accents, a shield or padlock in the logo, network diagrams implying complexity and control.



Wellness

Muted earth tones, lowercase wordmarks, generous white space, a sans-serif that whispers rather than shouts.



Fintech

Gradients suggesting movement, abstract marks gesturing at currency, purples and blues chosen to feel modern rather than institutional.



AI companies

Orbital shapes, a shared corporate blue, names ending in "AI," "ly," or a vowel.



SaaS

The same Inter typeface, a hero section with a floating dashboard mockup, a headline about "workflows" and "teams."

Luxury fashion went through its own version in the late 2010s - Burberry, Balenciaga, Celine, Calvin Klein and Saint Laurent all converged on near-identical all-caps sans-serif wordmarks, a phenomenon the design press nicknamed "the blanding". AI arrived on top of a visual landscape that was already narrowing.

What AI adds is speed - and a live comparison shows both directions it can go. In 2024, Coca-Cola rebuilt its 1995 "Holidays Are Coming" ad almost entirely with generative AI; critics panned it as an uncanny recreation, and a 2025 re-attempt was technically cleaner but still read as "an imitation of nostalgia rather than the thing itself" - no model can retrieve thirty years of emotional association from its training data. The same year, Starburst pointed the same class of tools towards the opposite goal: "Different Every Time," its first major campaign in twelve years, generated 300+ visually distinct scenes so no two viewings looked alike - a deliberate "balm for the sameness fed to us by the

algorithms," in the brand's words.

AI is not a homogenising force; it's an amplifier. Pointed at a generic brief, it mass-produces the generic. Pointed at a sharp one, it mass-produces the distinctive. The tool is identical in both cases - what changes is the direction it's given.

None of which answers the harder question underneath it all: does escaping the herd actually pay off, or is being different just a nicer story companies tell about themselves? Let's turn to the evidence, where the argument becomes more concrete.



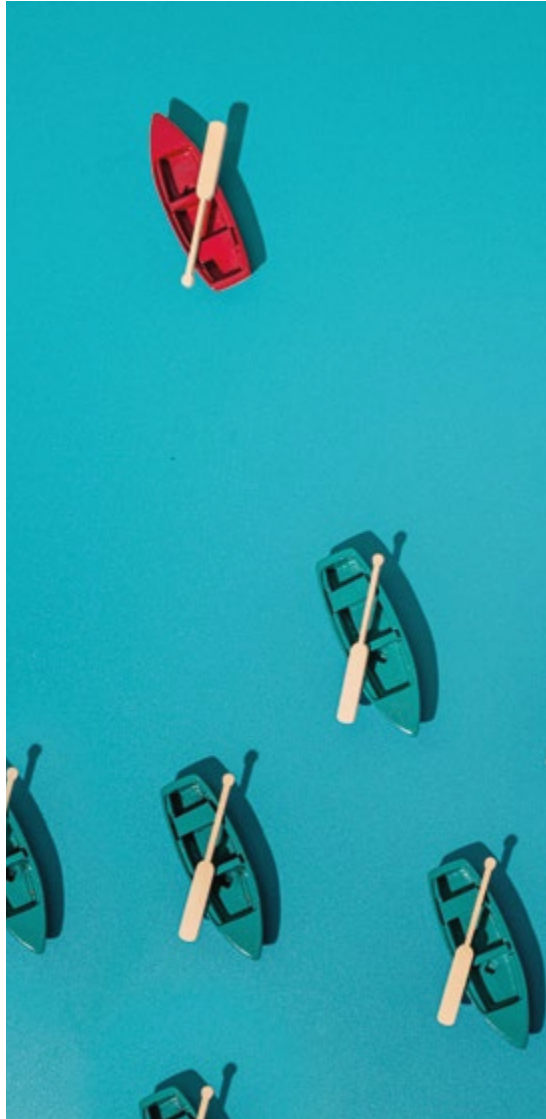
"Everything looks the same. Now what?"
Creative Bloq, June 2026

THE BUSINESS CASE FOR BEING DIFFERENT

Being genuinely different creates a measurable margin advantage.

Liquid Death sells the same water as everyone else and built a \$1.4 billion company doing it. That's not a lucky exception: billions of data points from Kantar, and a decade of research from Bain, show that being genuinely different pays off in cold, hard numbers, for giants and challengers alike. The harder test is coming to mind at the right moment.

If sameness really can be escaped, the clearest proof sits in one of the most commoditised categories there is. Bottled water offers almost nothing to differentiate on - chemically, one brand's water is indistinguishable from another's.



“

Brands - at their core - are
vessels of meaning.

Dr. Marcus Collins, Forbes, March 2024

Same water, different meaning

Liquid Death built a company valued at an estimated \$1.4 billion inside exactly that category, without meaningfully changing the product at all.

What Liquid Death changed was everything around it: plain mountain water, canned in aluminium “tallboys” designed to look like craft beer, branded with a skull and the tagline “Murder Your Thirst,” marketed with heavy-metal aesthetics and dark comedy. The company now reaches more than 100,000 retail doors across the US and UK.

The lesson for a category like appliances, where the underlying technology can be genuinely hard for a shopper to evaluate, isn't “be edgy.” It's that differentiation can start from a cultural reinterpretation

of a category, before - or entirely instead of - a functional reinvention of the product itself. Liquid Death didn't out-engineer the water category. It out-narrated it.

What turns a good story into a strategic argument is that the same pattern shows up reliably across thousands of brands and billions of data points - not just at the top of the market, but at the bottom of it too.

Liquid Death makes for a great story - but is it a lucky one-off, or something you can actually count on? Let's turn to the numbers: the same pattern shows up reliably across thousands of brands and billions of data points, from the very top of the market to the very bottom.



**CULTURAL
IMPACT**
\$1.4 BILLION
**ESTIMATED
VALUE**
100,000+
**RETAIL
DOORS**



“Liquid Death’s Billion-Dollar Valuation Stresses The Power Of Brand”
Dr. Marcus Collins, March 2024

DIFFERENTIATION AND PRICING POWER

Kantar's "Blueprint for Brand Growth" analysed 6.5 billion attitudinal and shopper data points, tracked over ten years, to test whether differentiation is "just" a creative ambition or something that shows up on a balance sheet.

Brands that consumers rate as "meaningfully different" - addressing needs competitors don't, in ways that are remembered - can charge up to twice as much as parity brands, and reach five times the market penetration, with a growth advantage that holds for at least two years afterwards.

Kantar's researchers identify four levers that build this kind of differentiation, each with a brand that owns it: Leadership (TikTok, setting the trend rather than following it), Distinctiveness (Louis Vuitton, an original look reinforced everywhere), Emotive clarity (Disney, one consistent feeling at every touchpoint), and Functional benefit (Doritos, a specific, superior product quality).

Few brands score high on all four - but the ones that do are the ones the data says grow fastest.

Kantar's data comes mostly from large, well-resourced brands with decades of equity to draw on. The more interesting question for a challenger, or for a private label without that legacy, is whether the same logic holds without the scale. Bain's research suggests it does - even more so.



"Blueprint for Brand Growth"
Kantar, 2026

SMALL PLAYERS, SHARP MEANINGS

In its most recent review, published March 2026, Bain found that independent, fast-growing "insurgent" brands held less than 2% of market share across the FMCG categories in which they compete.

Yet these brands captured 36% of those categories' incremental growth in 2025 - up from 23% in 2024, 20% in 2023 and just 6% in 2022. In food, insurgents drove 25% of category growth; in beauty and personal care, they accounted for nearly all of it.

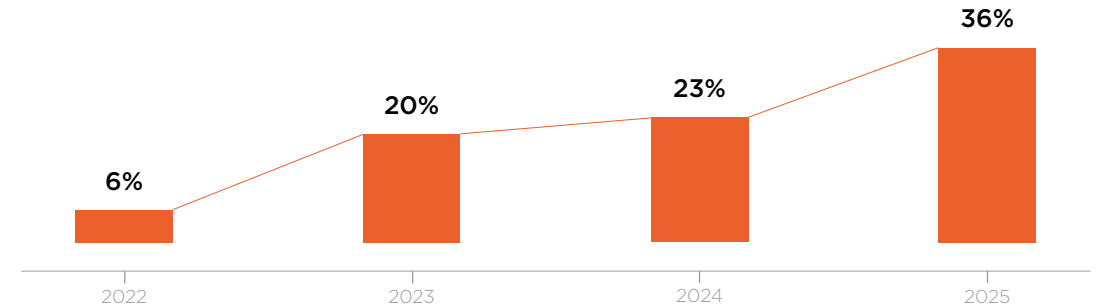
These are, for the most part, not technologically superior products. They are narrower, sharper propositions that reopen categories long assumed to be mature - a useful reminder, for retailers and private labels operating with a fraction of a global brand's resources, that differentiation is a question of focus and cultural relevance at least as much as one of scale.



"Brands to Watch: 10th Annual Insurgent Brands List" Bain & Company, 2026

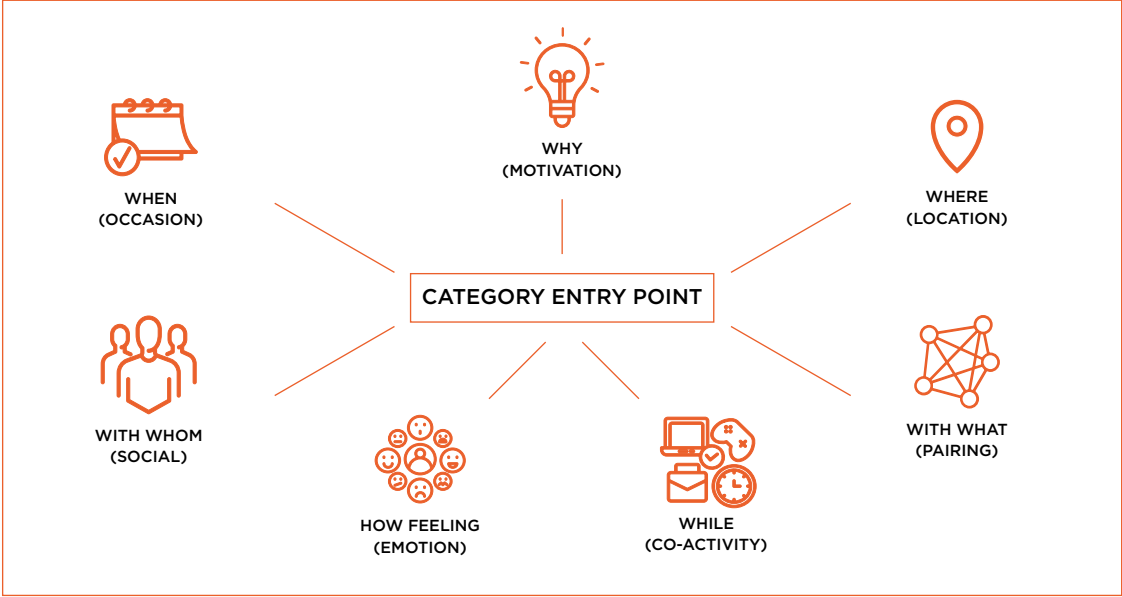
THE METEORIC RISE OF INSURGENT BRANDS IN THE FMCG SECTOR

Share of category growth captured by brands with under 2% total market share



THE SEVEN DOORS INTO A CATEGORY

A *Category Entry Point* is any moment in a customer's everyday journey that brings a category to mind before any brand competes for the choice. The Ehrenberg-Bass Institute's "7W" framework maps these entry points systematically:



Brands that are reliably linked to more of these moments tend to be chosen more often, independent of how many unique features they list. Dove owns "for moisturised skin," Snickers owns "when you're hungry," Corona owns "on the beach" - none of these is a product

claim; each is a mental doorway the brand has planted a flag in. It's a useful corrective to a purely feature-based idea of differentiation: being different only matters if it makes a brand easier, not harder, to think of at the moment a customer actually needs it.

AI LENS

The new sameness

AI is not the villain here. It is the accelerant. Generative tools, off-the-shelf templates and benchmark-driven optimisation all share a structural tendency: left without a clear point of view, they reproduce the dominant patterns in their training data - precisely what the Shin et al. (2026) study on web design homogenisation documents, and what Coca-Cola's and Starburst's opposite outcomes with the same technology illustrate in practice.

None of this is an argument against using AI. It's an argument for using it deliberately. A distinctive idea fed into a generative tool tends to come out sharper and travel faster. A generic brief fed into the same tool comes out just as generic - just produced at a speed and volume that makes the sameness harder to miss. The tool amplifies; the hand on the wheel is still human.

The feature war never really ended - it just changed battlefields and picked up speed. If what a product does is no longer enough to set it apart, what does the job? The answer has less to do with what a product does than with the meaning still beating inside it once the specs are forgotten.

BEYOND THE PRODUCT

If products become similar, what makes them desirable? Once function stops being able to carry the argument, meaning is what's left to make it.

When two products perform their function equally well, the difference between them stops being technical and becomes something else: a difference of meaning. Meaning, here, has a specific definition: the accumulated weight of culture, history and context that settles around a product over time, shaped by how it gets used, what it becomes associated with, and the story a company or a community keeps choosing to tell about it. That accumulation happens after the engineering is finished, in use and in memory, which is exactly why it can be built and defended on its own terms.



WHAT'S UNDERNEATH ISN'T WHAT SELLS

One platform, one engine, one gearbox and four completely different reasons to buy.

A mathematical idea most people forgot after school - that identical structures can look completely different from the outside - explains something very concrete: how Volkswagen builds four distinct brand personalities on exactly the same engineering skeleton. Same platform, same engine, same gearbox. Yet buyers can't tell, and don't much care. The lesson scales directly to any manufacturer sharing a platform across multiple brands.

Topology, the branch of mathematics concerned with shapes, starts from a deceptively simple idea: a coffee mug and a doughnut are, topologically, the same object: both are solids with exactly one hole through them. Stretch, squash or bend one, without cutting or gluing, and it becomes the other. The surface shape can change beyond recognition

while the underlying structure of connections stays exactly the same. Nobody needs the mathematics to put the idea to work. The useful version, for a business audience, is simpler: two things can share an identical underlying structure and still be read as completely different objects. Differentiation, in other words, has as much to do with what a shape is allowed to mean as with the shape itself. Few industries demonstrate this more literally than car manufacturing, and few companies more clearly than Volkswagen Group.

Since 2012, Volkswagen's Modularer Querbaukasten (MQB) has underpinned more than 32 million vehicles across brands including Volkswagen, Audi, Škoda and SEAT, from compact cars to SUVs. Every model shares the same core architecture and fixed hard points. Standardising this platform nearly halved engine and gearbox variants while reducing heater and air-conditioning units from 102 to 28, delivering substantial cost savings across the Group.

What happens on top of that shared skeleton is where the idea really earns its keep. When Top Gear tested four MQB-based cars side by side, an Audi A3, a Volkswagen Golf, a SEAT Leon and a Škoda Octavia, all four had the identical 2.0-litre diesel engine, the same six-speed manual gearbox, front-wheel drive and five doors. And yet the reviewer described four unmistakably different characters: the Škoda “honest and workmanlike”; the SEAT sharp-edged and youthful, its angularity doing double duty as the brand’s whole visual identity; the Golf “more touch-feely, more grown-up, more premium”; the Audi, with its knurled aluminium and adjustable seats, simply “posher.” Buyers, he noted, assumed a fixed price ladder running from Škoda up to Audi - and were wrong: on the day of the test, the cheapest of the four was the SEAT.



*Credits: Ra Boe / Wikipedia
MQB Bodengruppe auf der Hannover-Messe April 2012*



MQB's logic didn't stop at combustion engines. Volkswagen Group carried the same principle into its electric line-up with the Premium Platform Electric (PPE), co-developed by Audi and Porsche.

*Credits: Alexander-93 - Own work
Premium Platform Electric at IAA 2023*

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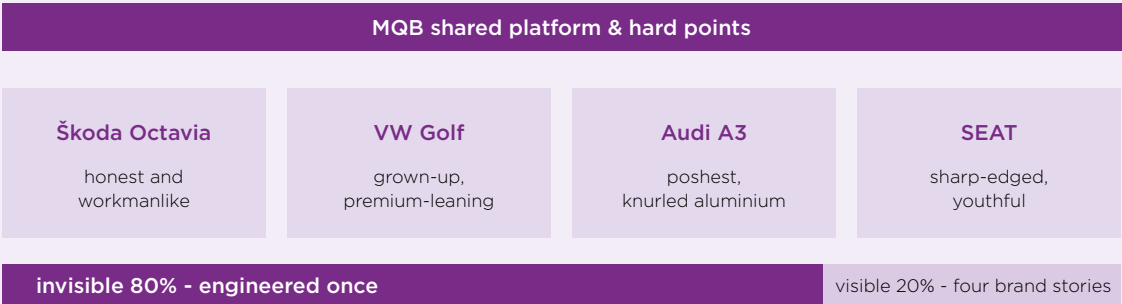
A new diversity through
intelligent creation of synergies.

Volkswagen Newsroom, 2022

ONE PLATFORM, FOUR BRANDS

One platform, four brands

Four brands took the same skeleton and dressed it in four different personalities. The entire commercial logic of the platform strategy, laid out at a glance:



Getting this right takes real, sustained investment in the layer sitting above the platform, and the industry’s own history shows exactly what happens when a manufacturer skips that step. In 1982, General Motors launched the Cadillac Cimarron on the same J-body

platform used by the Chevrolet Cavalier. The Cadillac Cimarron fooled almost nobody: critics and buyers recognised the underlying Cavalier immediately, and the car became a lasting embarrassment for the brand, still cited today as the textbook case of platform-sharing attempted without any real work done on meaning. Volkswagen’s four brands share hard points as completely as the Cimarron shared its Cavalier chassis.



“Modular toolkit strategy as recipe for success: the MQB celebrates tenth anniversary” Volkswagen Newsroom, 2022

What they don’t share is the shortcut: each badge earns its keep through years of distinct engineering feel, interior material choice and marketing story, not through a different grille bolted onto an identical car.

Any manufacturer supplying multiple brands or retail chains through shared engineering faces the same fork in the road the Cimarron illustrates. A shared platform becomes a shared meaning only through neglect - left alone, on its own, it stays exactly what it is: shared engineering, nothing more. Turning that into distinct brands takes work, and the gap it closes is exactly where a brand gets built brick by brick, decision by decision.

That logic is becoming more urgent, not less, as the car industry electrifies. Volkswagen carried the same modular philosophy directly into the MEB electric platform, and battery packs, motors and charging architecture are exactly the kind of expensive, invisible engineering that rewards being built once and dressed many times over. The pattern

generalises well beyond cars: the more a business shares underneath, the heavier the burden gets on whatever sits above it. Sharing more is safe only if something upstream is working harder to keep the surface different.



THE REFRIGERATOR AS FUTURE

How a kitchen appliance became a symbol of prosperity.

No appliance in history was adopted faster than the refrigerator from 8% of American homes in 1930 to near-total saturation by 1980. But manufacturers were never really selling cold storage. They were selling a vision of the future, one so powerful it became a Cold War talking point in a famous Nixon-Khrushchev showdown. The compressor was never really the point.

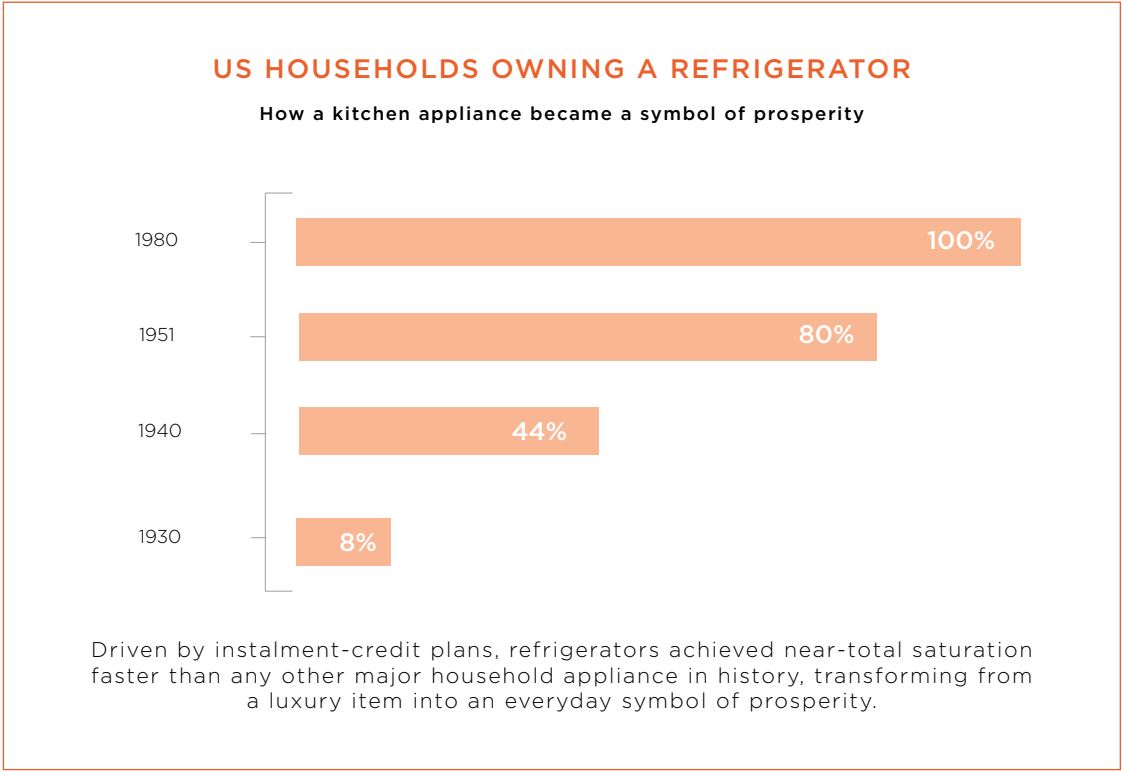
Few household objects have ever been adopted as fast as the refrigerator. In 1930, only 8% of American households owned one. By the end of that decade it was 44%. By 1951, 80%. By 1980, it was essentially universal. No other major appliance climbed that curve so quickly, and manufacturers, sensing what was happening, never sold the refrigerator as just a box that kept food cold. They sold it as a small, humming promise of the future, sitting right there in the kitchen.

That speed had a financial engine behind

it, as much as a cultural one. In the 1920s, an electric refrigerator cost roughly what a car cost - \$400 to \$600, a genuine luxury reserved for the well-off. What changed the arithmetic was the same instalment-credit machinery that had already put automobiles within reach of ordinary families: banks and retailers began offering monthly payment plans for refrigerators, and Frigidaire itself had to abandon its early positioning as a prestige item for the elite in favour of a mass-market appliance sold, a few dollars at a time, to households that could never have paid for one outright. By 1950, a \$300 refrigerator still represented roughly 9% of a family's annual income - but for the first time, that was a payment plan away rather than a wall.

Frigidaire's dominance of that emerging mass market ran deep enough that its own name quietly took over the language. The General Motors division defined the category in the American imagination so thoroughly that people started calling any refrigerator whatever

the badge on the door a "Frigidaire." Frigidaire's ubiquity may even have influenced the shortened form 'fridge', which entered common usage in the 1920s. Few brands ever get to become the grammar of their own category.



Source: "The Great Depression and the Rise of the Refrigerator" Matt Novak, 2012

THE REFRIGERATOR AS FUTURE

Selling tomorrow, not cold storage

What manufacturers and governments actually sold, across those decades, was a vision. Magazines like Life ran features such as 1951's "Why We Eat Better," using the refrigerator's shelves, impossibly full, as a stand-in for the wider abundance of American life. Entire food brands were built on the strength of its freezer compartment: Swanson dinners, Birds Eye vegetables, a category of convenience that hadn't existed a decade earlier.



The clearest demonstration of the stakes came in Moscow, on 24 July 1959. At the American National Exhibition, Vice President Richard Nixon and Soviet Premier Nikita Khrushchev held their famous "Kitchen Debate", an argument over which economic system was superior, staged in front of a fully equipped General Electric kitchen. The refrigerator carried the entire argument that day: a humble cooling box turned into a stand-in for an entire way of life, offered as evidence that one system could put abundance within reach of an ordinary family and the other could not.

The compressor humming away inside barely entered into it, next to what a full, cold, quietly running refrigerator was allowed to represent: prosperity, modernity, a family's place in the future.



"Electrolux uses design as a weapon in the Cold War" Electrolux Group, 2025



That symbolism, worth noting, was never universal. In much of postwar Europe the same American-style refrigerator arrived as a foreign spectacle rather than a household object - showcased at trade fairs and “Kitchen of Tomorrow” exhibitions, admired from a respectful distance, and only slowly adapted to homes with far less space and far smaller budgets than their American counterparts. The compressor technology crossed the Atlantic quickly. The meaning took decades longer, and arrived different: smaller, more modest, folded into kitchens that were never designed around it the way American kitchens increasingly were. The same object, carried into a different context, came out the other side meaning something else entirely - a manufacturer who only tracks the technology misses half the story.

That symbolic weight persisted well past the point where ownership hit saturation and abundance stopped being a story worth telling - it simply relocated. Today’s equivalent claims

tend to cluster around control rather than plenty: visibility into what’s inside, less food wasted, less energy used, food that stays fresher for longer. The compressor is almost incidental to the story either way. What changes, decade to decade, is which anxiety or aspiration a fridge is trusted to quietly stand in for.



IDENTITY AS A RESPONSE TO CONTEXT

A lesson in what real distinctiveness looks like when it isn’t trying.

A defensive earthen tower in China, a conical stone house in Puglia, and a breezy farmhouse in the American South have nothing in common - except that none of them were built to look distinctive, and all of them are instantly recognisable anyway. Vernacular architecture proves the strongest identities aren’t invented. They’re the honest result of solving one real, specific problem.

Not every distinctive identity is designed. Some of the most recognisable buildings on Earth were never designed by an architect at all - they grew, quite literally, out of the ground they stood on: raised by communities solving an immediate problem with the materials and knowledge on hand, generation after generation, until the solution hardened into a form.

Vernacular architecture is the term for this: building traditions shaped directly by climate, available materials and local ways of living, refined without a named author. What makes it useful here isn’t nostalgia for pre-industrial building, and everything to do with what it proves: a strong, instantly recognisable identity can emerge from genuinely solving a local problem, rather than from a deliberate search for novelty. Three examples, from three continents, make the point better than any single one could.

Three answers to three different problems

Distinctiveness was never the goal for any of these forms - each one was simply, quietly answering its own entirely different question.

Tulou (Fujian, China): circular or rectangular communal earth dwellings up to five storeys tall, walls nearly two metres thick at the base, a single gated entrance. UNESCO-listed since 2008. Built by Hakka communities to house up to 800 people and to survive banditry: the rammed-earth walls resisted both digging and gunfire.

Trulli (Alberobello, Italy): conical, corbelled roofs in dry limestone, built without mortar. UNESCO-listed since 1996. Thick stone walls kept interiors cool in Puglia's hot summers and warm in winter, using abundant local stone.

Dogtrot house (US South): two enclosed rooms separated by an open, roofed central passage. A direct response to the hot, humid summers of the American South: the breezeway pulled air through the house before mechanical cooling ever existed.

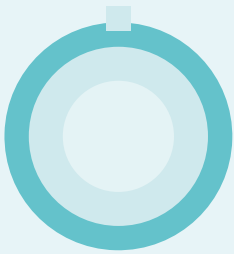


"Vernacular Architecture: The Latest"
ArchDaily, 2025

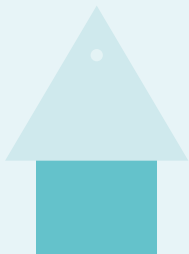
The logic hasn't stayed in the past. When Renzo Piano designed the Jean Marie Tjibaou Cultural Centre in New Caledonia, completed in 1998, he built ten curved wooden pavilions modelled directly on the traditional Kanak "grande case" and borrowed the same passive cooling logic vernacular builders had relied on for generations: a double timber facade that channels the Pacific trade winds through the structure, cutting the need for mechanical air conditioning almost entirely. Piano, a Pritzker Prize winner working with some of the most advanced materials available to him, chose to learn from the same climate logic a Dogtrot builder

in Alabama would have recognised on sight. Each of these forms was trying to survive its own climate, defend its own community, or simply move air through a room - nothing more ambitious than that and the resulting identity is stronger and more legible today than most logos designed on purpose, in a boardroom, with a brief attached. The lesson for a category built around genuine engineering constraints, like appliances, is a quietly reassuring one: authenticity in response to a real, specific problem tends to outlast identity manufactured for its own sake. Roots, it turns out, travel further than reinvention.

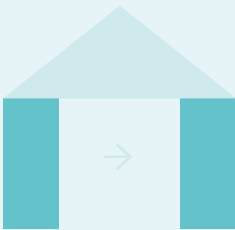
THREE ANSWERS TO THREE DIFFERENT PROBLEMS



TULOU
Fujian, China



TRULLI
Alberobello, Italy



DOGTROT HOUSE
US South

AI LENS

Exploring meaning

Where the previous chapter's AI Lens looked at AI as an accelerant of sameness, here it plays a more constructive role: as a tool for mapping meaning rather than producing it. Large language models are, structurally, very good at one specific task - holding huge volumes of text and surfacing the patterns, clusters and gaps inside it. Pointed at a category, that capability can map which associations a set of competitors already own, which claims are repeated so often they've become invisible wallpaper, and which meaningful territory nobody has claimed yet.

The distinction that matters is the same one as before, applied here: left to its own devices, AI won't discover the right meaning for a brand - at best, it accelerates a search that already knows roughly where it's going. Used without a strategic question in mind, it returns an average of what a category already says about itself. Used with one - where in this category's meaning-space is nobody standing? - it can compress weeks of manual competitive reading into an afternoon.

In practice, that might mean feeding a model transcripts of how customers actually describe their ideal kitchen ecosystem, then asking it to tag which of Kantar's four levers - leadership, distinctiveness, emotive clarity, functional benefit - each comment implies.

What starts as a pile of open-ended quotes becomes a navigable map of where a category's meaning already is, and where it plainly isn't yet.

On the surface, topology, refrigerators and vernacular houses share nothing at all. Underneath, all three rest on the same structural fact worth carrying forward: the object and its meaning are two different layers, and the second can be built, defended and changed independently of the first.

Some of that meaning is visible the moment a customer sees a product. Some of it is never seen at all - built into decisions, materials and processes nobody outside the company will ever inspect directly, yet which customers somehow still sense, almost by instinct, in the finished thing.

INVISIBLE DIFFERENTIATION

How do you differentiate a product that tends to disappear? When the object hides behind cabinetry, something else has to carry the argument.

38 Stand in a growing number of new kitchens today and you may struggle to find the fridge. No steel door, no display panel, no obvious box, just a continuous run of cabinetry, broken only by a discreet handle that hints at what's hiding behind one of those panels. The appliance hasn't gone anywhere. It has simply stopped announcing itself.

That single shift changes the whole communication problem. When a product is visible, it can sell itself on looks alone - a shape, a finish, a silhouette in a showroom. Once it disappears into the architecture, none of that is available any more. What's left to

communicate is everything that happens around the object rather than on its surface: how quietly it runs, how easily it was installed, how reliably it's serviced, how the relationship with the people who made it holds up once the sale is done.

None of this makes an appliance simpler to build. If anything, it's the opposite: a product that gives up its own visibility has to get everything else exactly right, because there's no longer a shape, a finish or a colour left to forgive the gaps.



THE VANISHING APPLIANCE

When the best design decision is to disappear.

Fully integrated design has moved from a rare luxury to a mainstream expectation, driven less by taste than by architecture: open-plan living put the kitchen permanently on display, forcing brands to design two kitchens at once - the one that cooks, and the one everyone sees. A 2024 trade-show dishwasher so hidden it has to project its cycle status onto the floor shows how far the trend has gone. But concealment carries a hidden cost too: a panel-ready door leaves almost no margin for installation error, quietly raising the stakes on everything that happens after delivery.

Fully integrated design - refrigerators behind cabinetry panels, dishwashers flush with the units either side, hoods folded into the ceiling - has moved from a luxury quirk to a mainstream expectation in a growing share of new kitchens. At the Kitchen & Bath Industry Show in February 2024, the trade event where manufacturers unveil what's

next, one of the standout products was a dishwasher so thoroughly hidden behind cabinetry that its cycle status has to be projected onto the floor in front of it, because there is no display left to put it on.

Viking's award-winning RVL collection made the same point at furniture scale: refrigeration columns arranged in flush, matching rows, barely distinguishable from the cabinetry around them. The industry's own trend-watchers tend to frame this as an aesthetic shift - seamless, transitional, European - but underneath the styling language sits a genuine communication problem. A product that refuses to be seen cannot lean on being seen to make its case.

That doesn't mean every kitchen is heading the same way. Retailers serving this trend are quick to note that plenty of buyers still want a statement appliance - a bold colour, a visible brand, a piece of furniture in its own right - and that the choice comes down to how someone wants their kitchen to feel, not a single industry-wide verdict. But for

the growing segment that does want the disappearing act, the more interesting question isn't aesthetic at all. It's what a company has left to say once the thing it makes can no longer make the argument simply by sitting there, visible, in the room.

The tension was on full display at Milan's EuroCucina fair in April 2026, the industry's biggest stage for what comes next. Alongside kitchens designed to vanish, several manufacturers pushed in exactly the opposite direction: extractor hoods reimagined as sculptural objects in their own right, wine and refrigeration columns finished to be admired rather than hidden. The two impulses aren't really contradictory - they're the same underlying logic pointed in opposite directions. Once a product can no longer win simply by being visible and ordinary, a manufacturer is left with two credible choices: disappear completely, or become distinctive enough that hiding it would be a waste.

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The key is being very strategic about what gets concealed and how it's accessed

Britany Simon, 2026

The reasons buyers give for wanting the disappearing act are practical as much as aesthetic: a streamlined look free of mismatched finishes, better use of space in smaller kitchens, fewer exposed edges to collect dust and grime, and - retailers report - a measurable bump in resale value once a kitchen reads as a single, considered piece rather than a row of separate boxes. None of those reasons has anything to do with what the appliance

actually does once it's switched on.

There's a specific reason this is happening now, and it has more to do with architecture than with appliances. Italian kitchen designers have a name for the decades-long process behind it: a domestic "pangaea", the slow merging of rooms that were once kept entirely separate. Traditional Italian homes kept a small eating nook, the tinello, apart from the kitchen, the dining room and

the more formal lounge reserved for guests: four rooms, four functions. Over the following decades those rooms drifted together into one continuous open-plan landmass, and the kitchen stopped being something people could close a door on. Concealment looks like that same drift entering a second phase: no longer satisfied with merely sharing a room with the living area, the kitchen is now trying to stop looking like a kitchen at all. Designers increasingly describe the result as effectively designing two kitchens at once - the one that does the cooking, and the one everyone actually sees. Concealing appliances, and opening cabinetry through discreet grooves rather than handles, is how that second kitchen gets built.

That concealment carries a cost the customer never sees until something goes wrong. A panel-ready door has to align within millimetres of cabinetry around it, which designers describe as leaving a far smaller margin for error than a standalone appliance ever had. Hiding the product doesn't remove the stakes

on getting it right - it quietly transfers them onto everything that happens after delivery: installation, service, and a relationship that now has to compensate for a product that can no longer show its own quality on the surface.



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The easiest way to be distinct is
by always looking the same

JP Castlin, 2025

WHEN THE PRODUCT DISAPPEARS

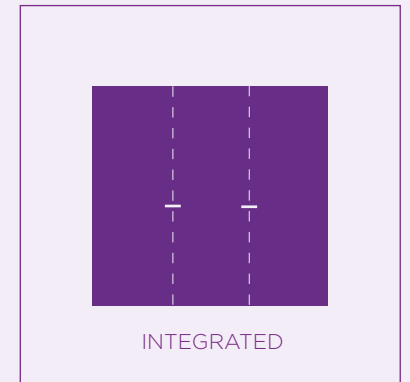
Two walls, two languages

The comparison is straightforward once it's drawn out: a wall of distinct, branded objects against a wall of almost nothing, just a handle here and there.

Once the product looks like that second wall, silence, ease of installation and reliability over years become the entire pitch - because the shape, colour and finish that used to carry a brand's identity are no longer available to do that work.



"Invisible Kitchen Technology: Hidden Systems for a Contemporary Look"
The Plan, 2026



THE SERVICE LAYER

Product scores are flat. Service scores are falling.

National satisfaction data shows a consistent pattern: durability, design and capacity all score high and barely move year to year, while ease of repair, technician courtesy and installation quality are the scores actually declining. One in ten new appliances isn't working properly the moment the installer leaves the house - an entirely invisible failure that quietly decides whether a customer ever buys the same brand twice. The business case is just as strong as the loyalty case: aftermarket service margins run at roughly 25%, well above the 10% typical of new product sales.

If the object itself stops carrying the argument, something else has to. In most mature categories, that something turns out to be everything that happens before, during and after the sale: installation, onboarding, maintenance, repair, replacement, and the ordinary, unglamorous business of a relationship that outlasts the transaction.

The American Customer Satisfaction Index tracks this precisely, surveying more than 16,000 households a year about their major appliances. Its most recent findings are telling: the product attributes manufacturers obsess over - durability, design, capacity - score consistently high and barely move year to year. The scores that are actually falling are the service ones: ease of arranging a repair, technician courtesy, how long a fix takes, whether the problem gets solved on the first visit. As the study's research director put it, the real contest has shifted from the latest technology to the overall experience of owning and maintaining the thing. The index's own analysts point to a likely cause: as appliances grow more complex, with sensors, apps and electronics layered onto what used to be simple mechanical devices, repairs take longer and cost more to get right - and the service experience is the first place that complexity shows up.

The moments that matter most are often the quietest ones. Consumer Reports,

surveying tens of thousands of appliance owners, found that roughly one in ten new appliances isn't working properly the moment the installer leaves the house - a largely invisible failure point that few manufacturers measure directly, because by the time it surfaces as a complaint, it already looks like a service problem rather than a product one.

There's a hard financial reason to take all this seriously beyond satisfaction scores. McKinsey research puts average margins on aftermarket service at around 25%, against roughly 10% on new product sales. The service layer isn't only where loyalty gets won or lost - for many manufacturers, it's already the more profitable half of the business, even though it's usually the half that gets the least strategic attention.

The retention economics behind this are not subtle. Existing customers are somewhere between 60% and 70% more likely to buy again, against a 5% to 20% chance of converting someone entirely new - a gap that holds roughly true whether the purchase in question

is a washing machine or a service contract. For an OEM, the same logic simply moves up a level. A retailer or a brand deciding which manufacturer to build a relationship with is making exactly this calculation, and when the hardware on offer is difficult to tell apart from a competitor's, it's responsiveness on spare parts, technical support and problem resolution that actually gets remembered and rehired.

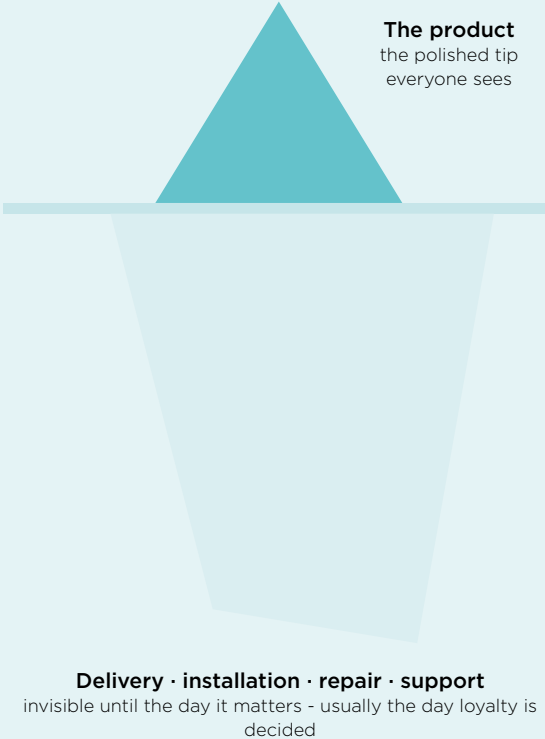


Source: "Industrial aftermarket services: Growing the core" McKinsey & Company

The loyalty iceberg

Picture the relationship as an iceberg. The product is the small, polished tip everyone sees at the point of sale.

Everything below the waterline is invisible until the day it matters, and that day is usually the one that decides whether a customer ever buys the same brand again.



"American Customer Satisfaction Index"
Household Appliance Study, 2024-2025

FROM PRODUCT TO SYSTEM

Selling the outcome instead of the object.

A product-service system designs the object and the service around it together from day one, rather than adding support after the fact. Rolls-Royce's six-decade-old "Power-by-the-Hour" programme pays the company only when its engines actually fly, aligning its incentives precisely with reliability. Philips' pay-per-lux deal with Amsterdam's Schiphol Airport pushed its engineers to build fixtures that last 75% longer, because Philips now profits from durability rather than replacement. Neither is an eccentric outlier: equipment-as-a-service is already an estimated \$21 billion market, and growing fast.

Push this logic far enough and the product stops being the unit of analysis altogether. Germany's Fraunhofer Institute, which advises manufacturers on exactly this transition, defines a product-service system plainly: an integrated offer in which the object and the services built around it are designed together

from the outset, rather than bolted onto a finished product as an afterthought. Fraunhofer's own research names the first benefit of doing this well before any other: escaping commoditisation. Once a product looks and performs like everyone else's, wrapping it in services a competitor can't easily copy is one of the few remaining ways to offer something genuinely distinct - alongside higher, more predictable recurring revenue, a clearer view across the entire product life-cycle, and access to customers who couldn't previously afford or justify the product on its own.

The broader trend already has a name - servitisation - and a growing market to go with it. Equipment-as-a-service reached an estimated \$21 billion globally by the end of 2023, with analysts projecting roughly 11% annual growth through 2028. Rolls-Royce and Philips, in other words, are not eccentric outliers. They're early, well-documented examples of a shift now sizeable enough to be tracked as its own line item across manufacturing.

Rolls-Royce has run the clearest version of this for over sixty years. Since 1962, its trademarked “Power-by-the-Hour” programme has meant that customers pay for maintenance and support linked to engine flying hours, aligning Rolls-Royce’s incentives with availability and reliability. The incentive this creates is precise: Rolls-Royce only gets paid when the engine performs, so Rolls-Royce is the party most motivated to make sure it never breaks down. One documented US Navy contract under this model produced \$61 million in savings over five years compared with the conventional parts-and-labour arrangement it replaced. Some of these maintenance contracts now run for more than two decades.

Philips built a newer version of the same idea at Amsterdam’s Schiphol Airport, where it doesn’t sell light fittings at all. Under a “pay-per-lux” arrangement, Schiphol pays only for the light it actually uses, while Philips owns the fixtures and is responsible for every repair and upgrade. Because Philips

now profits from fixtures lasting as long as possible, rather than from selling replacements, the arrangement pushed its own engineers to design lighting that lasts roughly 75% longer than before. Aligning who pays with who’s responsible turned out to be a more effective sustainability lever than any single component redesign.



“Lighting as a Service”
Jill Entwistle, 2016

Hilti runs a smaller, more everyday version on building sites: rather than selling power tools, it leases entire fleets of them for a flat monthly fee, tags each one with a chip that tracks its use, and replaces or repairs tools proactively before a breakdown can stall a job. Three industries, three completely different products, and the same underlying move: stop selling the object and start selling the outcome it was always meant to produce.

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Servitisation of business: adding value by adding services

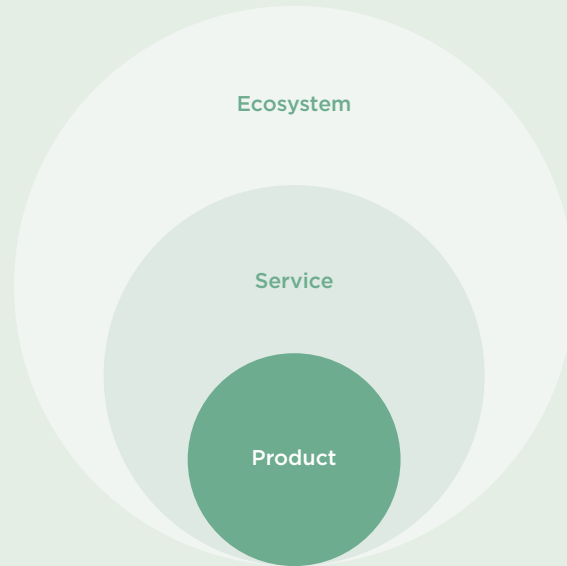
European Management Journal, Vol. 6, Issue 4

Three nested layers of value

The shift these examples describe can be drawn as three nested layers, widening outward from the object itself:

The product still sits at the centre - nobody is arguing it stops mattering. Increasingly, though, the layers around it are where a company chooses whether to compete at all.

Do people buy products, or do they buy the wider arrangement a product sits inside? Increasingly, in categories where the object itself is hard to tell apart from a competitor's, it's the arrangement that gets remembered.



AI LENS

Designing experiences

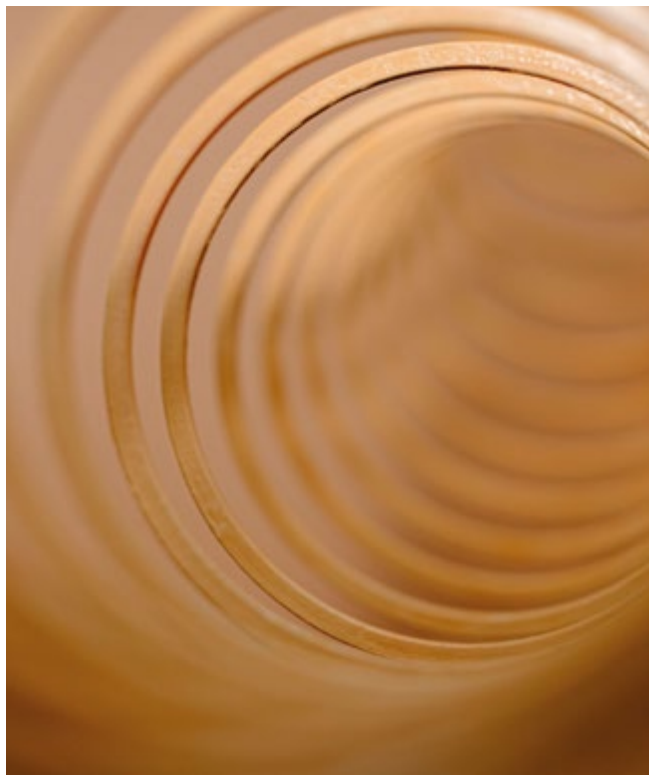
Here, AI's most useful role sits closer to research than to production: reading through service reviews and support tickets at a volume no team could manage by hand, and surfacing where a customer journey quietly breaks down - a confusing installation step, a repair visit that took three attempts, an onboarding email nobody opens.

Used well, this shortens the distance between a real customer frustration and a fix a designer can act on. Used carelessly, it flattens distinct complaints into an average that satisfies nobody. The tool can only ever be as sharp as the question a team brings to it - a caution worth repeating in this new setting.

THE PERCEPTION ADVANTAGE

Why do some products build loyalty even among equals? A product can be genuinely different and still lose, if nobody registers the difference.

A product can be genuinely different and still lose, if nobody registers the difference. Perception, in this sense, isn't about impressions or opinions in the abstract. It's the gap between what a company actually built and what a customer can actually notice, hold onto, and repeat back to somebody else months later, at the exact moment a repeat purchase gets decided. The most reliable way to close the gap has very little to do with advertising, and a great deal to do with what surrounds a product once it's already been bought: the content built around it, the services that keep it running, the rituals that



form around using it, and - more than any of these - the community of people who end up talking to each other about it, often with no involvement from the company at all.

An ecosystem, on its own, guarantees nothing. Plenty of companies have built one and watched customers politely ignore it. The difference between an ecosystem that gets noticed and one that doesn't almost always come down to whether it generates something specific: a recognisable sense of belonging, not just a recognisable logo.

THE PRODUCT THAT BECAME A PLATFORM

When what's built around an object matters more than the object itself.

A kitchen machine and a steel grill shouldn't have much in common - yet both built the same three things around themselves: a shared identity, recurring rituals, and an unwritten obligation between members to help one another out. Vorwerk turned a forty-year-old

appliance into a subscription ecosystem in 2014 with Cookidoo; Weber turned a 1952 backyard fix into what it now calls "an American family grilling tradition." Neither community was manufactured top-down - both were noticed forming, then given better tools, more visibility, and somewhere to gather.

In 2001, marketing researchers Albert Muniz Jr. and Thomas O'Guinn gave this phenomenon an academic name: brand community - a community bound not by geography but by shared devotion to a brand. The paper that introduced the concept went on to become one of the most cited pieces of research in business and economics worldwide, and it identified three markers that separate a community from an ordinary customer base.

THE THREE MARKERS OF A REAL BRAND COMMUNITY

What every real community shares

Muniz and O’Guinn found the same three ingredients recurring across the communities they studied, whatever the product:

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Consciousness of kind

A shared sense of belonging to the same group - and of being subtly different from everyone outside it.

Rituals & traditions

Repeated practices, in-jokes and shared moments passed from member to member.

Moral responsibility

An obligation to help fellow members - answering questions, sharing fixes, welcoming newcomers.

What a company can do is notice them forming and build better tools for whichever ones are already there.

None of this is a soft, feel-good add-on sitting outside the real business. In one industry survey, 60% of consumers said they felt more loyal to a brand specifically because of the community built around it, and the classic finding on retention economics still holds regardless

of category: a 5% increase in customer retention can lift profits by 25% to 95%. Community is one of the more reliable levers available for moving that number, and two very different products show what it looks like in practice.

Vorwerk’s Thermomix shows all three markers at once, inside a single, very ordinary kitchen appliance.

The company has been family-owned in Wuppertal, Germany, since 1883, and the first Thermomix - the VM 2000 - appeared in its catalogue in 1971 as a new idea: a single machine that could weigh, chop, blend and cook, replacing a counter full of separate appliances. For more than four decades and several generations of hardware - the TM21 in 1996, the TM31 in 2004 - that idea alone was the entire pitch, and it worked well enough that the machine is still reported to sell at a rate of roughly two units somewhere in the world every minute.

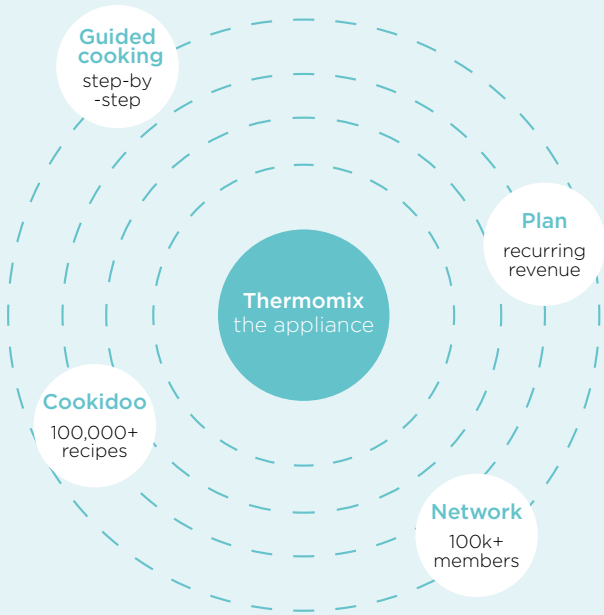
The turning point came in 2014, with the TM5: Vorwerk’s first touchscreen model, and the launch of Cookidoo alongside it - more than 100,000 professionally tested recipes, guided step-by-step cooking synced directly to the machine’s screen, meal planning and shopping lists layered on top. The company didn’t add a recipe app to a struggling product. It added one to an appliance that had already been selling briskly for over forty years, turning an established object into a daily ritual: In the United States alone,

Thermomix owners cooked upwards of 2.8 million guided Cookidoo recipes in a single year, almost 8,000 recipes cooked daily.

Alongside that official, curated ritual sits an unofficial layer built entirely on obligation to fellow members: hundreds of Facebook groups, some with more than 100,000 members, where owners trade shared recipes, troubleshoot bread that won’t rise, and argue amiably about technique, unprompted and unpaid. And the identity that comes with belonging is one nobody at Vorwerk had to invent - owners affectionately nickname their machine “Thermie,” and the company’s own sales representatives talk about a “Thermomix family” rather than a customer base.

Thermomix is sold almost exclusively through in-home demonstrations, where an advisor prepares a meal for potential buyers. With an 85% conversion rate, customers typically experience the product before they buy it.

Where the appliance ends



Ask where the appliance ends and the ecosystem begins, and the honest answer is: nowhere cleanly.

A Thermomix without Cookidoo is a capable, expensive multicooker.

Cookidoo without the machine is a recipe website. What owners actually pay an annual subscription for is the combination, plus a community that formed around it that Vorwerk never had to build, only to let happen.

The same three markers show up just as clearly in a completely different category, one built around fire and steel rather than recipes and touchscreens - evidence that this isn't a quirk of one clever appliance brand, but a pattern that travels.

Weber's origin story is, fittingly, a story about a fix suggested by someone outside the company - an obligation to a fellow enthusiast built into the invention before the brand even existed. In 1952, George Stephen was a metalworker at Weber Brothers Metal Works outside Chicago, welding marine buoys for the Coast Guard by day and fighting a badly designed backyard brazier by night. Stephen cut a buoy in half, added legs and a handle, and took his dome-shaped contraption home. It didn't work at first - with no way for air to reach the coals, the fire kept dying. A neighbour watching him fuss over it made the suggestion that saved the invention: poke some holes in it and let the fire breathe. It worked. Stephen sold his first units as "George's Barbecue Kettle" for

\$29.95, roughly £215 today. Seventy years later, Weber sells across more than 40 countries, runs its online shop in 21 countries and 12 languages, and sales have grown at a compound annual rate of roughly 10% since 1980. Its own corporate materials describe the company not as an appliance manufacturer but as the custodian of an American family grilling tradition - a shared identity positioning the products as a fixture of gatherings rather than a cooking tool that happens to be used outdoors. Grilling, unlike most everyday cooking, is rarely a solitary act; it tends to happen with an audience, on a specific occasion, in front of people whose opinion of the result matters.

The Weber Grill Academy turns technique into a shared body of knowledge and a recurring ritual, rather than something each new owner has to work out alone. Registering a grill through the "Weber ID" turns a one-off purchase into an ongoing relationship, with tips, recipe suggestions and service information following the product

home. And the Weber Connect App - redesigned in 2023, carrying more than 800 recipes and step-by-step live temperature graphing - deliberately works with gas, charcoal, pellet and electric grills, including models Weber didn't build. The app's job isn't to lock owners into Weber hardware. It's to make Weber the operating system for outdoor cooking generally, whichever grill happens to be underneath it.

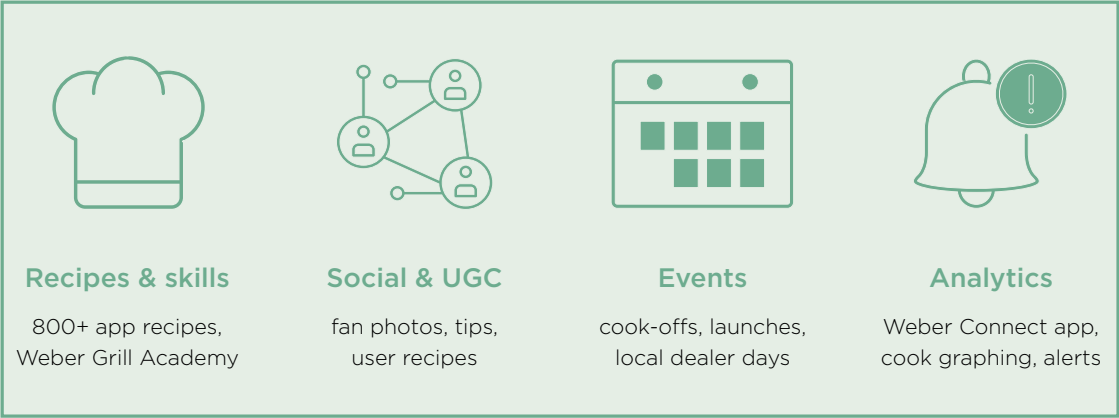


"Cookidoo Digital Recipe Ecosystem"
Intive, 2022



COMMUNITY AS COMPETITIVE ASSET

Four layers of a grill community



"Digitally transforming Weber"
Martin Kool, 2023

That distinction matters for how transferable the lesson is. Communities that get manufactured wholesale tend to feel exactly like what they are. The ones that last start with an existing practice - a neighbour's tip, a family recipe - that a company then gives better tools, more visibility and a shared vocabulary.

Two completely different products, in two completely different categories, ended up building the same three things almost without realising they were following a documented theory: a shared identity members recognise each other by, rituals worth repeating, and

an unwritten obligation to help the next person figure it out. That combination is difficult to manufacture on demand from a marketing brief. It's considerably easier to notice once it's forming, and to give it better tools, more visibility, and somewhere to gather.



AI LENS

Reading perception

Here, AI's most useful job is reading the gap between what a company thinks it's saying and what its customers actually hear. Reviews, social conversation, support queries, forum threads and user-generated recipes or photos all carry a record of how a proposition is genuinely being told and interpreted, at a volume no team could read manually.

That reading is the whole contribution. Understanding how perception is currently distributed doesn't decide what ought to make a brand distinctive next - that judgement call stays a human one. The tool can surface the pattern. It can't choose which pattern is worth building on.

DESIGNING THE SPACE BETWEEN: AN INTERVIEW WITH STEFANO MAFFEI

Stefano Maffei is full Professor of Design at Politecnico di Milano, where where his work spans the evolution of service design, the Product-Service Systems circular transition, and the search for meaning and values that increasingly matter as much as the product discourse itself. His perspective grounds the argument in something more rigorous than marketing language: a disciplinary approach built specifically around designing what happens between a product and the people who use it.

You've spent years working on product-service systems. What changes when a company stops simply designing a product and starts designing the value system around it?

Let me give a problematic answer rather than a definitive one. The idea

of a "system-product" belongs to the advanced capitalism's framework and it no longer matches the phase we're in. We're in an accelerated (and not meaningful) Schumpeterian era of creative destruction: the individual and collective belief in perpetual growth and endless affluence is definitely over,

replaced by a plurality of value systems that are often contradictory even within the same person. I might want the extraordinary experience of a three-Michelin-star dinner and, a moment later, care deeply about a project that recovers food to feed people in need. Pervasive digitalisation keeps both worlds permanently switched on and accessible.

This creates real, concrete problems most companies don't fully grasp. I might once have built a made-to-order retail system with a long supply chain and a short-term delivery promise; today that chain risks becoming uneconomical, and reshoring forces me to rethink the promise itself, not just the logistics. Companies tend to treat this complexity as external to the "system-product", when it directly shapes how their proposition gets perceived and evaluated. The balance of power has shifted too. Judgement is now shaped by peer-to-peer comparison. Reviews have become essential to how we verify a value system's quality. A company can



talk endlessly about its sustainability, but if reviews demolish the product, I won't buy it.

So there's no single moment when a product crosses over into becoming part of a value system. How does a customer come to perceive that shift?

In household appliances, trust gets built through maintenance, troubleshooting, after-sales support and reputation

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The belief in perpetual growth and endless mass affluence is breaking down, replaced by a plurality of value systems that are often contradictory even within the same person.

Stefano Maffei

among the people who use the product. That trust can also collapse instantly: if I recognise an aggressive sales pattern - leave your details just to find out the price - it drops to zero immediately. Think about choosing a restaurant somewhere unfamiliar: you check reviews, the menu, the distance, the cost, then decide. The same mechanism now applies to higher-order values too - a company's labour practices, its environmental impact - things that were technically always part of the product, but that I can now verify through third parties that simply didn't exist before.

A lot of brands today talk about “ecosystems”. Where does a real ecosystem around a product begin? Does an app that simply connects a fridge and a washing machine already count as one?

I find the “imperialist” undertone of the ecosystem concept difficult - bring you in, and you're expected to take everything on offer. That kind of behaviour is rare in practice, because people are complex and choose based

on many different parameters. One real limit is building closed ecosystems that don't interoperate: I shouldn't need five different apps, each governing one device, when I could integrate the fundamental data from my air conditioner, fridge, iron and oven into a single system.

This tension showed up clearly with the Ferrari Luce. Coming from Modena, where prestige cars evoke a world of materials and controls, the Luce brought in an almost smartwatch-like logic: simplified functions, few customisations. Many people found it almost sacrilegious next to the unused potential of other solutions. That's exactly the tension at play: adding features doesn't automatically make a product more interesting. What I actually need is a quick ramp-up: within five minutes of unboxing, I should know the 20% of functions I'll use for the product's whole life, while the rest stays accessible without demanding my attention. An ecosystem, then, isn't just physical integration. It's a choice of interaction

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I find the ‘imperialist’ undertone of the ecosystem concept difficult.

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philosophy. Engineering logic often assumes that having more functions is always better; I don’t think that holds in an environment that’s already hyper-populated and hyper-connected. And there’s a system-level problem between manufacturers too: without shared conventions, the way telecoms standardised years ago, things become a jungle. When something is hard to understand, people hesitate, and often simply don’t buy.

Let’s talk about OEM and ODM producers. Here, the differentiation has to happen in what surrounds the product - service, communication, simplifying things like maintenance and support. What other service conditions can realistically be designed around a product?

There’s first the question of installability. This information sometimes isn’t even available digitally; maintenance catalogues often give simplified guidance by problem category rather than a real manual for that specific machine. This matters more now that European

right-to-repair regulation is coming into force, bringing the material quality of products back to the forefront after decades where repair rarely made economic sense.

Trust comes from being able to imagine that a product is repairable, and that spare parts and information are easy to access. That means modularity and thinking in terms of a product platform rather than an infinite warehouse of parts for every model. It can even change manufacturing itself, towards on-demand production, or design for download, where you supply a printable file instead

of the physical part. Innovations like these matter enormously for a private label tied to a retailer, because trust also comes from the retailer’s own name.

In appliances specifically, private label shows up in two different forms: heritage names relaunched without ever having manufactured anything themselves, and retail chains that create their own lines without even using their own name on them. How should they differentiate meaningfully, then?

The informational link between a product and how it reaches the market

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Students work on a "speculative design" project during the "Design Futures" course, detail of a prototype, 2026

is often so weak that real differentiation never actually reaches the customer - comparison platforms mediate everything, and in an average search almost nobody goes beyond energy class, capacity, and a couple of other quick parameters. You can't invent a

genuinely original story every day, and that niche is already saturated.

There's also a structural continuity problem private labels don't always see: a brand needs recognisable, continuous traits, and if you own your own plants, that continuity comes from your own investment. One angle I do think has legs: not a generic energy label, but a transparent way of showing real running costs. Imagine a calculator that shows an initial saving of three hundred euros being outweighed many times over across the product's life-cycle costs. Proposals like that struggle to gain traction, partly because the underlying product doesn't always support the claim.

Building something genuinely different, and not just a different image, requires a real system and real risk - something like Darty's service model in France, where decades of investment in a strong repair network turned an annual fee into a reason customers stay loyal for life. Can a system like that realistically be built by any company?

Master's in Design for Food

The Master's in Design for Food at Poli.design is an interdisciplinary programme, developed in collaboration with the University of Parma, that combines design culture, gastronomy, sustainability, and innovation. The goal is to train professionals capable of understanding the food system in all its complexity and transforming it through design, understood as a tool for research, connection, and change.

The programme addresses topics ranging from food design to branding, from packaging to communication, and extends to the design of services, experiences, and strategies for companies, regions, and organisations. The curriculum integrates lectures, workshops with businesses, study tours, and urban food experiences, offering students direct interaction with producers, artisans, and leading entities in the agri-food sector.

One of the programme's distinctive features is its design-based approach: each project stems from real-world needs and is developed through research, analysis, co-design, prototyping, and presentation. This method enables students to acquire practical skills and a systemic understanding of food,

capable of combining cultural value, social impact, and sustainability.

Aimed at graduates and professionals from diverse fields, including design, communication, architecture, gastronomy, and marketing, as well as other related disciplines, the Master's programme fosters a highly interdisciplinary environment, preparing professionals capable of innovating the entire food supply chain with a design-oriented approach.



A group of students works on the "Gen-AI Lab" project, in collaboration with IBM, at the IBM Innovation Studio, Piazza Gae Aulenti, Milan, 2026

Reading suggestions

Four volumes on design, technology, and design responsibility

The four volumes trace a critical genealogy of the relationship between design, technology, and power. Maldonado opens the discussion on the environmental responsibility of technical rationality; Manzini transforms it into a widespread, collaborative practice oriented towards social innovation; Lorusso reverses the perspective, exploring disillusionment as a critical lens for uncovering design's limitations and unfulfilled promises; Crawford, finally, extends the same critique to artificial intelligence, revealing its material, economic, and political nature. Together, the texts trace a path spanning the decades, from the design optimism of the 1970s to contemporary scepticism, moving between faith in technical rationality and a radical critique of power.



La speranza progettuale

Maldonado, T. (2022). *La speranza progettuale. Ambiente e società* (expanded ed.). Feltrinelli. (Original work published 1970)

In this 1970 classic, presented here in an expanded edition, Tomás Maldonado addresses the environmental crisis as a responsibility of technical rationality: against pessimism, he proposes conscious design as an act of transformation.



Né intelligente né artificiale

Crawford, K. (2021). *Né intelligente né artificiale. Il lato oscuro dell'IA*. Il Mulino.

Kate Crawford dismantles the myth of AI as an immaterial, neutral entity: behind the algorithms lie natural resources, exploited labour, and infrastructures of power that need to be made visible and critiqued.



Design, When Everybody Designs

Manzini, E. (2015). *Design, when everybody designs: An introduction to design for social innovation* (R. Coad, Trans.). MIT Press.

Ezio Manzini redefines design as a widespread practice, not the preserve of a handful of experts, but a collective capacity for social innovation that generates more resilient, collaborative, and sustainable communities the world over.



Il designer senza qualità

Lorusso, S. (2025). *Il designer senza qualità. Saggi su design e disillusione*. Krisis Publishing.

Silvio Lorusso explores the gap between design's optimistic promises and everyday practice, proposing disillusionment as a critical tool - not a failure - for understanding the discipline's limitations.

“

AI itself is like navigating an infinite sea.

Regulation now effectively imposes this kind of model. In the past, pushing customers to replace rather than repair could even be more profitable, but that room has shrunk drastically. What's left is a choice of positioning: do you want to be among the experimenters and early adopters, or simply produce a fridge like any other? Not every company assigns itself a leadership role, but that choice still shapes reputation, trust, and the value system built around the product.

You've written about customer journeys as a service design tool. Is that tool still adequate for the kind of systemic complexity we've been describing?

The customer journey has helped build service design as a discipline, but like any tool it needs updating. In its most operational form it analyses one precise

thing: the interaction between an artefact and a user. If we're talking about ecosystems, journeys need to trace back through the whole chain a product comes from - not to abolish the tool, but to build it at different depths for different scales. The user's own perspective becomes more participatory too: if I don't offer the chance to understand or choose, someone else will, and my offer will look more closed by comparison.

Sometimes a product-service solution that works beautifully for the customer is disastrous for everything else. If you trace a fully extended journey back far enough, you might discover a precious material in a circuit board was extracted by children working illegally - and knowing that, you might not want to buy the product at all. That kind of extended journey wouldn't offer a perfect picture, but certainly a much clearer one.

That's really the flip side of the same argument - human-centred design, if it becomes too focused on the human alone, risks treating everything else as external. And that leads to

**the last topic: artificial intelligence,
and its effect on products, work and
organisations.**

Systemic attention will become a requirement too, and not just an ideal. Regulation will increasingly demand it, and it will have very concrete applications before long.

AI itself is like navigating an infinite sea; I don't think it's possible to put the genie back in the lamp, but we do need to assess its effects over the medium and long term, because it doesn't just enter as a component of a product; it contributes to creating the entire system, from design to communication.

Generative systems have also been trained on an enormous archive of intellectual property and patents, which opens delicate problems and risks devaluing human labour, particularly in professions connected to innovation and design. There's already talk of an employment crisis among new graduates: the basic tasks that used to let juniors build experience inside an



*Detail of a prototype developed as part of the workshop
in collaboration with OASI Arzaga, 2026*

agency are increasingly carried out by AI, and part of that apprenticeship simply disappears.

This creates a kind of desert crossing in the learning pyramid: paradoxically, AI favours whoever already has the skills, not whoever still needs to acquire

them. One or two competent people, handling these tools well, can now do the work that used to require a thirty-person agency and clients won't pay the same fees once they know that. It's a phenomenon that's still not very visible, but the signals are arriving. It's complicated further because a client's review of a piece of work is now often carried out not by a competent human being but by another AI system - before even looking at the material themselves, they hand it over and ask: "right, critique this."

BIO

Architect and PhD in Design. Full Professor of Design at the School of Design at Politecnico di Milano, where he teaches Service Design and Innovation Theory. He is Director of the Specialising Master in Service Design at POLI.design, Consortium Company of Politecnico di Milano specialising in postgraduate training. He is also Director of Polifactory, the interdepartmental fab lab and makerspace of Politecnico di Milano. His research interests focus on service design innovation, new production-distribution models and advanced and distributed microproduction systems. He coordinates the Politecnico research teams working within the European-funded projects REFLOW, DDMP and T-FACTOR. He was awarded the XXII Compasso d'Oro in Design Research for the Design Research Maps project.

A BOX BEFORE THE PRODUCT

Turning packaging from a functional necessity into a brand touchpoint.

The experience of a new refrigerator begins long before it enters the home. The appliance may be discovered online, compared in store, or selected from a catalogue. Its packaging is part of that journey too: protecting and presenting the appliance as it moves through warehouses and retail spaces, is handled by logistics teams and installers, and finally reaches the threshold of the home.

For decades, that tall cardboard box has been treated almost entirely as a technical object. Its job was clear: protect the appliance, survive logistics, carry essential information, arrive intact. In the industrial logic of large home appliances, packaging has often been seen as a necessary cost, not as a strategic surface.

Yet the box is large, visible and unavoidable. In many cases, it is the first large-scale physical expression of the brand that the customer actually sees, and it passes through more brand moments than many campaigns, from factory and logistics to retail, doorstep and unboxing. This is the simple shift at the heart of Homa's packaging project: not a merely decorated carton, and not a cosmetic exercise, but a branding-led packaging platform designed to inspire customers' own brands and to support private labels.

The ambition is simple: to turn the box from a cost item into a communication asset, an existing industrial object made communicative.



SHARED PLATFORM, MANY EXPRESSIONS

The project begins with a specific reality of Homa's business. In OEM/ODM markets, the same industrial expertise can support customer brands with completely different positions, audiences, price tiers and ambitions: retailer-owned private labels seeking stronger shelf presence, emerging brands that need to look more established, importers that need faster market tools, and mature brands looking for new ways to communicate value without redesigning the product itself.

This is not a weakness. It is one of the strengths of the model. Shared platforms make scale, competitiveness and speed possible. They allow industrial knowledge to move across markets and product families, reducing complexity where complexity does not create value.

But shared platforms also create a challenge: how can different customer brands avoid looking generic before the product has even been unpacked?

Packaging is often where that risk becomes visible first. A product may be carefully engineered, efficiently manufactured and well adapted to a customer's market, but if its carton looks anonymous, the difference remains hidden until later in the journey.

For Homa, the opportunity is not to create a Homa packaging identity. The system is not organised around one house style, but around the possibility of many customer expressions. It works in the layer where perception is formed: graphics, tone of voice, information hierarchy, visual rhythm, imagery, claims and product storytelling.

PERCEPTION DESIGN

The central idea of the project is not to make packaging "nicer". The goal is to create perception options: distinct visual and verbal territories that help different customer brands express how they want to be seen.

A private label competing on reassurance should not speak like one competing on performance. A premium line should not organise information like a playful entry-level brand. A technical, evidence-led brand should not use the

same rhythm, density or emotional register as a lifestyle-driven one.

This is where the project uses the twelve brand archetypes as a working framework. The archetype is not illustrated literally: the result is not twelve fixed templates. It is a packaging grammar: visual language, verbal tone, surface treatment and materials. This distinction matters: templates are rigid and trends expire, while a grammar can adapt.



A shortcut to meaning, not a costume to wear.

The idea of archetypes originates in C. G. Jung’s work on recurring symbolic patterns in the collective unconscious. The familiar twelve-archetype framework used in branding, however, is a later applied system developed by Carol S. Pearson and popularised for brand strategy by Margaret Mark and Carol S. Pearson in *The Hero and the Outlaw* (2001).

Designing for perception means recognising that packaging is often the first point of contact between a brand and its audience. Before a product is touched or tested, consumers form expectations through visual cues, language and information hierarchy. For this reason, every design choice contributes to shaping not only recognition, but also the values and personality associated with the brand.

In branding, archetypes are not characters to be copied literally. They are meaning patterns: a way to clarify a brand’s deeper motivation, tone of voice, relationship with its audience and type of promise. For packaging, this makes them especially useful: an archetype can guide how a surface behaves without forcing every brand into the same visual language.

Archetypes are not a predictive science but a working framework: they do not measure a brand; they give it a coherent character. A brand that behaves like a consistent, recognisable character is easier to remember and trust.

ARCHETYPE	CORE MEANING	PACKAGING ATTITUDE
 Innocent	Simplicity, optimism, trust	Clean, light, reassuring
 Explorer	Freedom, discovery, independence	Open, dynamic, expansive
 Sage	Knowledge, clarity, truth	Precise, informative, evidence-led
 Hero	Courage, performance, mastery	Bold, strong, results-driven
 Outlaw	Disruption, rebellion, change	Unconventional, provocative, sharp
 Magician	Transformation, possibility, wonder	Imaginative, surprising, effortless
 Everyperson	Belonging, familiarity, realism	Accessible, warm, unpretentious
 Lover	Beauty, pleasure, intimacy	Sensory, elegant, emotionally rich
 Jester	Play, lightness, spontaneity	Bright, witty, unexpected
 Caregiver	Protection, care, generosity	Soft, supportive, human
 Creator	Imagination, craft, originality	Expressive, inventive, design-led
 Ruler	Control, order, authority	Premium, structured, confident

FROM ARCHETYPE TO PACKAGING TERRITORY

Once the archetype becomes a visual and verbal grammar, the box stops being a neutral surface. It begins to behave like a brand territory.

A Caregiver direction might use soft hierarchy, reassuring language and everyday gestures. A Sage direction might rely on evidence, clarity, diagrams and a more precise technical voice. A Ruler direction might use controlled silence, space, order and authority. A Creator direction might allow more visual invention and compositional originality. A Hero direction might make robustness, capacity and performance feel immediate.

Each territory can be adjusted to the customer's identity, market, brand maturity, price positioning and production constraints. The archetype provides direction, but the final expression remains open enough to become specific to a real customer brand.

MAKING PRODUCT VALUE LEGIBLE

In appliance categories, much of the product's real value is difficult to perceive immediately. Energy efficiency, cooling stability, air distribution and long-term reliability all matter deeply, but they often require explanation - and the product may even remain packed until delivery. Packaging can help bridge that gap: not by overloading the carton with technical claims, but by making the product's promise more legible.

A Sage-inspired box can turn preservation technology into confidence. A Caregiver-inspired box can connect freshness to family care. A Magician-inspired box can make invisible microclimates feel like transformation. A Hero-inspired box can make capacity and strength immediate. A Lover-inspired box can give beauty and domestic pleasure a stronger role. Differentiation means making the most relevant value easier to recognise.

FROM CARTON TO RETAIL BACKDROP

When the packaging is the point of sale.

In a retail setting, three or four packed units placed behind one unpacked appliance can become a branded backdrop without additional POP materials, panels or furniture. For retailer-owned private labels, which often have fewer communication assets than established consumer brands, the packaging system can turn stocked products into a low-friction branded environment.

The box, in other words, is not only a container. It is a surface, a stage, a signal and, in some contexts, a lightweight retail architecture.



PACKAGING AS DIFFERENTIATION INFRASTRUCTURE

The box still protects, still moves, still carries handling information. What changes is the ambition: instead of treating the carton as a silent industrial wrapper, Homa treats it as differentiation infrastructure: a scalable surface where customer brands can begin to express who they are, what they value and how they want their products to be perceived.

This makes the project emblematic of a broader shift in differentiation.

Not every meaningful difference has to sit inside the product. Some differences live around it: in content, retail experience, unboxing and the first physical contact between brand and customer. Sometimes the most powerful move is not to add another feature, but to recognise an existing touchpoint and make it work harder. In that sense, the packaging project is not a side story to Homa's thinking on differentiation. It is one of its clearest examples.

A shared platform can still create ownable identities. A necessary box can become a brand environment. And a surface long treated as anonymous can become the first place where a customer feels that this product was never generic at all.



“

A brand's meaning is a
company's most valuable
competitive advantage.

Margaret Mark & Carol S. Pearson, *The Hero and the Outlaw*, 2001

THE AI PARADOX

If everyone has access to the same tools, what is left to make us unique? AI cuts both ways, and does so at the same time.

Every company reading this now has access to much the same generative technology as its competitors: a handful of frontier models, licensed on similar terms and capable of similar things. That fact unsettles a question that used to have a simpler answer: what actually makes a product distinctive, once the technology behind it is nobody's private advantage?

The honest answer is that AI cuts both ways and does so simultaneously. Left without direction, it can flatten a category into a thousand near-identical variations of the same idea. Pointed with intention, it can turn a small team's insight into something that reaches

further, faster and more precisely than a much larger team could manage unaided. Both of these things are true at once, for the same technology, often inside the same industry within months of each other.

What decides which version shows up has very little to do with the tool itself. The more useful question, then, was never whether AI helps or hurts differentiation - it demonstrably does both. The question is under which conditions AI contributes to building something distinctive, and what has to already be in place before anyone points it at anything at all.



OLDER THAN IT FEELS

From “can machines think?” to a subscription anyone can buy.

Seventy-five years separate Turing's original question from the tool now open in every browser tab - a history of quiet, incremental breakthroughs that only felt sudden once distribution finally caught up with the science. The article also maps the wider AI landscape into seven macro-areas, distinguishing the tools that shape how a product gets described and discovered from those that are simply useful behind the scenes.

Alan Turing asked, in 1950, whether machines could think - a question that took seventy-five years to arrive at an answer anyone outside a research lab could actually use. What happened in between is worth walking through in more than a sentence, because each era truly believed, at the time, that it had found the answer.

Seventy-five years in the making

More than seven decades separate the question from the tool - most of that time spent building towards a moment that still managed to feel sudden.

What changed recently was never the underlying idea. It was who could afford to use it, and how quickly.

The speed of the final entry on that list is what made decades of gradual progress feel like a single overnight event. When OpenAI released ChatGPT as a free preview on 30 November 2022, it reached a million users within five days and 100 million within about two months - a pace TikTok, then considered the fastest-growing consumer app in internet history, had taken nine months to match, and Instagram had taken two and a half years to reach. The underlying science had been building for decades, through at least two “AI winters” in which funding and confidence fell sharply after early waves of AI failed to live up to expectations. The distribution, this time, took weeks.

That access now spans a wider set of tools than the word “AI” usually suggests, and not all of them touch differentiation in the same way.



“The state of AI in 2026: On the road to ROI”
McKinsey, 2026



1950 - TURING

Turing proposes the “Imitation Game” to sidestep whether machines truly think - no computer of the era has remotely enough memory or speed to attempt it



1956-74 - EARLY AI & EXPERT SYSTEMS

The Dartmouth Conference coins “artificial intelligence.” Programs like MYCIN encode expert knowledge as hand-written rules - powerful in narrow domains, unable to learn or generalise.



1990s-2012 - MACHINE LEARNING

Statistical methods let software learn patterns directly from data instead of fixed rules, quietly powering early spam filters, fraud detection and recommendation engines.



2012-17 - DEEP LEARNING

AlexNet’s dramatic win at image recognition proves neural networks, once dismissed as impractical, work brilliantly once matched with GPU computing power.



2017 - TRANSFORMERS

Google’s “Attention Is All You Need” lets models weigh every word against every other at once - the architecture inside every major language model since.

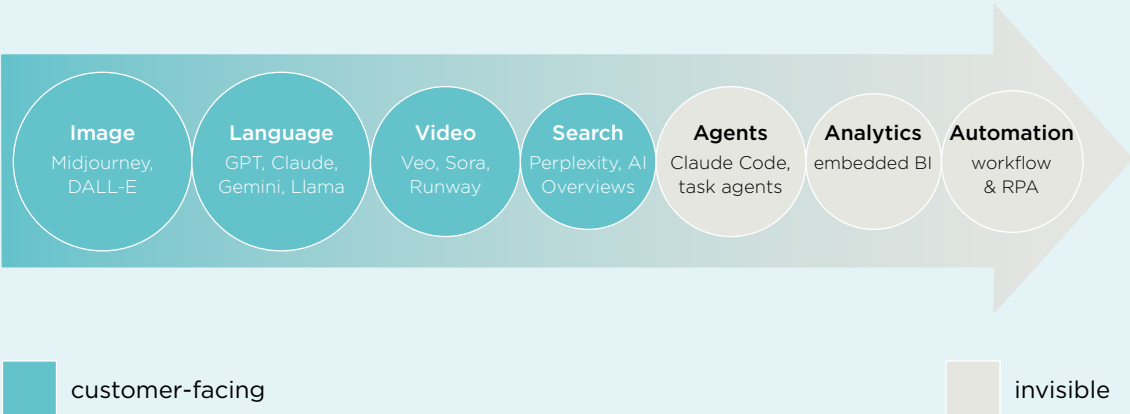


2022-PRESENT - GENERATIVE AI

ChatGPT and other generative AI tools turn a research capability into a free, conversational habit, reaching mass adoption at unprecedented speed. ChatGPT alone reached 100 million users within about two months of launch.

Seven macro-areas of AI

Roughly seven macro-areas make up what people mean when they say “AI” today. Some sit close to how a product gets described, discovered and compared. Others are operationally useful and strategically invisible:



Language, image, video and search-and-discovery tools shape the words and pictures a customer actually encounters - which is why they matter most to everything this chapter is examining. Agents sit in between: increasingly capable of shaping output,

not yet as visible to a customer as language or image tools are. Analytics and automation are where most of AI’s quiet productivity gains are happening - genuinely valuable, and almost entirely invisible to anyone outside the company running them.

ONE TECHNOLOGY, TWO ENDINGS

Identical access produces opposite results.

The same class of generative tool produced a viral, forgettable ad stunt and a drug candidate that reached clinical trials in a fraction of the usual time and cost - within months of each other. Kalshi’s NBA Finals commercial shows what happens when AI is pointed at a generic brief; Insilico Medicine and Walmart’s Bettergoods show what happens when it’s pointed at a specific, well-researched question instead.

Widespread use of generative tools can, and often does, produce content, visuals, copy and interfaces that look and read more alike with every passing month - especially when the brief behind them is generic, the template is off-the-shelf, and the model is being judged against an average benchmark rather than a specific point of view. Left without a distinctive direction, that’s not a failure mode. It’s the default.

Researchers have taken to calling the resulting drift the “beige internet”: a feedback loop in which generic AI output gets published, folds back into the training data shaping the next generation models and narrows the visual and verbal language of the web a little further with every cycle. The result is a look and a voice that a growing number of readers can now recognise on sight, whatever the industry - because the tools converging on it are, in a meaningful sense, the same tools.

During Game 3 of the 2025 NBA Finals, the prediction-market platform Kalshi supplied a vivid, single-brand illustration of that same generic-prompt logic taken to its extreme rather than corrected for. It aired what is widely regarded as the first entirely AI-generated commercial to run during a primetime American sports broadcast: a deliberately unhinged sequence - a man riding an alligator through a kiddie pool, a beer-drinking alien, hurricane betting odds - stitched together from roughly 300 to 400 attempts at Google’s Veo 3 video

model until fifteen usable clips emerged. Filmmaker PJ Accetturo built the whole thing in two days for \$2,000, against the seven-figure budget and months of production a comparable traditional spot would have required: a 95% cost saving that made headlines faster than the advert itself did.



NBA Finals Commercial Kalshi. 2025

<https://www.youtube.com/watch?v=-QMftwmyW-A>

The commercial worked as a stunt. Whether it worked as differentiation is a separate question. Cheap, fast production is not, on its own, a moat. It's a starting line every competitor can now stand on at the same time, using the same tool, to broadly the same effect.

None of that is the whole story, because the same broad category of tool does something close to the opposite the moment it's pointed at a sharper question. Used well, generative AI supports analysis at a scale no team could manage manually, creative exploration across far more variations

than time would otherwise allow, semantic mapping of what a category already says about itself, gap analysis of what nobody has claimed yet, generation of genuine variants rather than one safe answer, and adaptation of the same underlying idea to different audiences and contexts without starting from zero each time. Two real cases make the contrast concrete.

Insilico Medicine, a Hong Kong-based biotech, used its proprietary Pharma.AI platform - pairing a target-discovery engine called PandaOmics with a molecule-design tool called Chemistry42 - to take a drug candidate for idiopathic pulmonary fibrosis from target discovery to a nominated preclinical candidate in eighteen months, for \$2.6 million. Conventional discovery for a comparable candidate typically takes three to six years and many hundreds of millions of dollars. The resulting compound, rentosertib, went on to complete a Phase IIa trial with a favourable safety profile - a result that depended less on the AI platform,

which any well-funded biotech can now license or approximate, than on years of accumulated fibrosis-specific research the platform had to be aimed at.

What happened next is the part worth lingering on. That single result didn't just validate one drug candidate; it became the credibility Insilico spent the following years compounding. By March 2026, pharmaceutical giant Eli Lilly had expanded its relationship with Insilico into a collaboration worth up to \$2.75 billion, one of the largest AI-drug partnerships ever signed, layered on top of a smaller licensing deal the two firms had already run since 2023. The tool alone was never the source of the advantage. What compounded, deal after deal, was the specific, hard-won expertise about where to point it.



A small-molecule TNIK inhibitor targets fibrosis in preclinical and clinical models
Ren F. et al. 2024

<https://www.nature.com/articles/s41587-024-02143-0>

Walmart tells a similar story at retail scale. Its Trend-to-Product system - a multi-agent tool that tracks emerging

signals across social media and search data, generates concept mood boards, and feeds them directly into sourcing and prototyping - helped the retailer launch Bettergoods, its largest private-label food and beverage brand in two decades, faster than any private label it had brought to market before. Within its first year, Bettergoods reached 9% of American households, making it, alongside Target's Dealworthy, one of the two fastest-growing private-label brands of 2024, each more than doubling sales volume. Walmart reports the tool cutting some development cycles by as much as eighteen weeks. Trend-to-Product didn't invent Walmart's read on what shoppers wanted next. It compressed the distance between noticing that and getting it onto a shelf.



SAME TOOL, DIFFERENT OUTCOMES

The input is the whole game

The same broad category of technology, aimed at a joke and at a drug candidate, in the same eighteen-month window:

OUTPUT QUALITY	
Generic prompt + off-the-shelf template Average, interchangeable output	Strategic direction + a defined difference Sharper, distinctive output, faster
Generic prompt + no strategic filter Fast production of more sameness	Strategic direction + no real distinctiveness Polished execution of a weak idea
INPUT DIRECTION	

Sameness and distinction were never a property of the tool. They were always a property of the brief it was handed.



"Competition and Diversity in Generative AI"
Manish Raghavan, 2024
<https://arxiv.org>

ACCESS IS NOT ADVANTAGE

Everyone has the tool. Almost nobody has an edge.

Nearly every company now has access to the same frontier AI models - 88%, according to McKinsey's latest survey - yet only a small fraction captures any real advantage from them. A 2024 MIT study explains why: competition, not the algorithm, is what pushes AI towards distinctiveness rather than sameness. The article's central argument: AI amplifies whatever direction it's given, which means the strategy has to exist before the tool is switched on.

Here is the uncomfortable part for any company hoping AI itself might become a competitive edge: it almost certainly won't, not for long. The same frontier models are licensed to any business willing to pay for them. The gap that used to separate a well-resourced company from a scrappy challenger - engineering talent, computing budgets, specialist software - is narrowing faster than most strategy documents have caught up with. AI democratises

production: the same broad capability that once justified a large team and a large budget is now available, in some form, to nearly anyone. Precisely because of that, the bar that actually separates companies moves. It stops sitting on production, where AI has levelled almost everyone, and lands on direction, which AI still cannot supply on its own.

McKinsey's most recent survey of nearly 2,000 organisations across 105 countries puts a number on how thoroughly that access has already spread: 88% now use AI in at least one business function, and 79% use generative AI specifically. Yet only about 5.5% qualify as genuine high performers, capturing a meaningful share of profit from it. Almost everyone has the tool. Almost nobody is getting a distinctive advantage out of it, which is itself the clearest evidence that the tool was never where the advantage was going to live.

A 2024 game-theoretic study from MIT's Manish Raghavan offers a precise, formal reason why. Modelling markets

where producers compete for attention using generative AI, Raghavan found that homogenisation is real but not inevitable: it's strongest exactly where competitive pressure is weakest. Where producers face genuine competition and are rewarded for standing out, the same tools get pushed towards diversity rather than sameness - and, more surprisingly still, a model that scores well on a generic isolated benchmark can perform poorly the moment it's actually tested against real rivals fighting for the same customer. Sameness, in other words, isn't a property of the algorithm. It's what happens by default when nothing is pushing back against it.

If the tool is available to everyone, the advantage has to be sitting somewhere else: in the specificity of the difference a company already knows it wants to build. AI doesn't supply that specificity. It was never going to. What it does, reliably, is amplify whatever direction it's given, at a speed and scale no human team could match working alone.



AI AMPLIFIES WHAT ALREADY EXISTS

Same amplifier, opposite results

Pointed at a weak or absent strategy, AI amplifies the absence: more content, more variations, all converging on the same generic middle every competitor's

tool is also converging on. Pointed at a strategy that already knows what it's trying to say, the same technology amplifies that clarity instead.

Weak strategy

no distinctive idea

+ AI



**Amplified
sameness**

Strong strategy

a real, defined difference

+ AI



**Amplified
distinction**

The equation is identical in both directions. Only the input changes, which means the input is the entire game. Access, in other words, is the price of entry now. It stopped being the prize some time ago.



"The Widening AI Value Gap"
by Apotheker J., et al., 2025

HOW AI SEES YOU

Discovery has a new gatekeeper, and it talks back.

Generative search tools now shape a meaningful share of how products get discovered and compared, and the language they use is no longer fully in a brand's control. Porsche used that fact deliberately, closing a specific perception gap and lifting its AI visibility by nineteen points.

Set the risk side of this equation aside for a moment, because the more useful story for a retailer or a private label is what happens when the same technology is aimed deliberately at an advantage rather than left to drift.

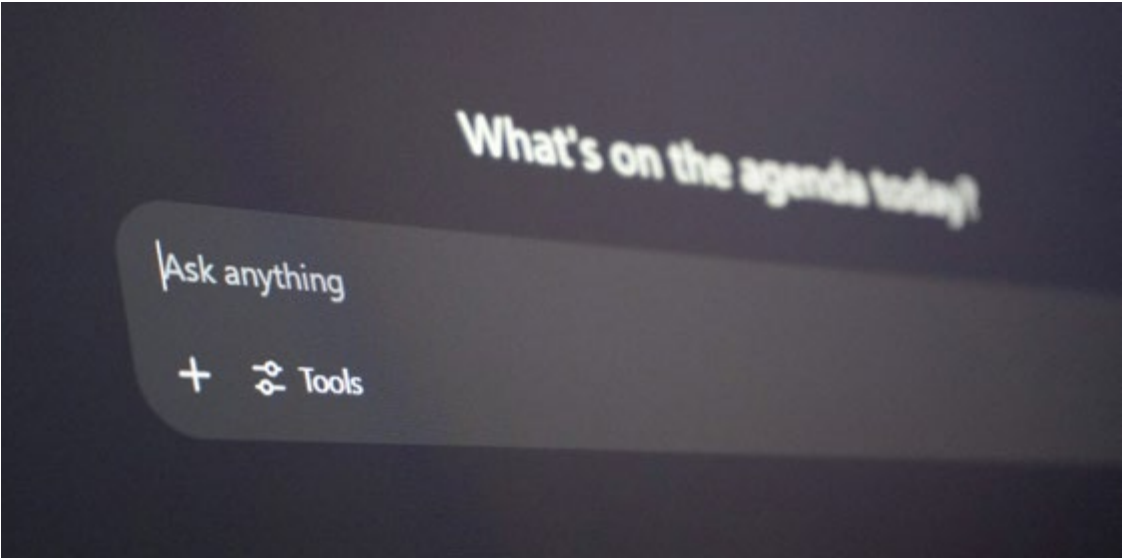
The scale of the opportunity starts with where attention has already moved: industry research on AI search behaviour suggests roughly 80% of consumers now lean on AI-generated summaries at some point during a search, rather than reading through a page of links themselves. Generative search tools already mediate a meaningful share

of how products get discovered, compared and recommended - which means the language these systems use to describe a brand has become something a company can actively manage, not just something that happens to it.

Porsche showed what managing it looks like in practice. Using Evertune's Generative Engine Optimisation platform - which runs upwards of 100,000 queries per brand across the major AI models to build a statistically reliable picture of how each one gets described - Porsche identified a specific, fixable gap: strong recognition for performance, but a weaker, second-tier perception on safety next to BMW, Mercedes-Benz and Audi. It didn't treat that finding as a threat to manage defensively. It adjusted its messaging deliberately, and its measured AI visibility improved by nineteen points as a direct result. Read as a strategic tool rather than a monitoring exercise, AI-mediated discovery turned into a place to actively compete, not just a place to be described.

For retailers and private labels without Porsche's decades of accumulated brand equity, the same logic arguably matters more, not less. A smaller player can use AI-mediated discovery to read an entire category from the outside: scanning what every competitor already claims, mapping where those claims cluster and where they leave real gaps, generating fresh territory to test in that white space, and then scaling whatever concept survives testing across packaging, content and channels far faster than

a small team could manage by hand. None of that shortcuts the harder question underneath it - which difference is actually worth building, and for whom - but it puts real category intelligence within reach of teams that could never have afforded a full competitive study before. Scale, for the first time in this particular kind of analysis, stops being the deciding factor in who gets to ask the question at all.



Six practical habits

The ideas explored in this chapter can be translated into six practical habits for teams using AI to support differentiation:

- ✓ **Audit how AI currently describes your product.**
Run the real questions a customer would ask across two or three AI models. Porsche found its safety-perception gap only by checking systematically, not by assuming its message had landed.
- ✓ **Name the difference before generating anything.**
The point of view has to exist before the tool switches on. Insilico's platform accelerated the application of expertise the team already had; it didn't invent that expertise. AI moves a difference faster. It can't create one from nothing.
- ✓ **Map category white space, don't fill a content calendar.**
Scanning what competitors already claim to find what nobody has occupied yet is a different task from generating more content in the same register as everyone else's.
- ✓ **Test outputs against real rivals, not internal benchmarks.**
Raghavan's research shows content that scores well in isolation can still lose next to what competitors are actually producing.
- ✓ **Keep the direction human-owned.**
Execution and exploration can be delegated at scale. Judgement about what's actually worth saying can't.
- ✓ **Re-check AI visibility regularly.**
Models and their answers keep changing. Porsche's gain came from monitoring visibility continuously, not fixing it once.



A dishwasher hidden behind a cabinet panel, a kettle grill unchanged in shape since 1952, a jet engine leased by the hour instead of sold outright, a kitchen machine that sells itself through someone else's kitchen: none of these depended on AI to become distinctive, because none of them are really about the object at all. They're about a decision, made early and held onto, about what a company wanted to be remembered for. AI doesn't replace that decision. It just makes the consequences of having made it - or of never having made it - visible faster, and further, than ever before.

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