Hyper-Differentiation Strategies: Delivering Value, Retaining Profits

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Abstract

In today's increasingly competitive business environment companies can, and indeed must, respond more rapidly to customers' changing demands, desires, and preferences. In today's information-rich environment customers can comparison shop, get product reviews from other customers, and, in general, become very well informed about what is available in the market.

- **If your offerings are not differentiated, pure price competition will be more extreme than ever before.** If your customer thinks your goods and services have direct competitors your prices (and theirs) will be squeezed down to your marginal costs of production!
- **If your offerings are successfully differentiated, then your customers will not see other products as competing directly, or as competing at all effectively.** Your prices will be determined by your value to your customers, and not by your costs or your competitors' costs of production.

While differentiation has long been a basis of competitive strategy, newly available sources of information do change the nature and importance of differentiation:

- Information in the hands of customers has increased price pressure on all producers, **increasing the need to differentiate your products and services.**
- Information you provide to customers makes it possible for you to communicate your value proposition more effectively, **increasing the value you receive from differentiation.**
- Information makes it possible for you to determine what customers want, and makes it possible for you to **tailor your design and your production** to these needs, supporting accuracy and precision of differentiation. It is not necessary to be better in any absolute sense, or to be more costly to produce; it is merely necessary to be better for individual customers and more valuable to them.
- Information makes it possible for you to **track the changes in behavior, preferences, demands, and desires of your best customers** and serve them with precision, accuracy, and cost-effectiveness that competitors will never be able to match.

1. Increased Information Endowments and the Profitability of Differentiation Strategies

Customers know more; that is, they now enjoy a **superior information endowment**. By any objective measure, purchasers now know much more about firms and service providers. They can determine the on-time service levels of airlines and the earnings of every mutual fund, in absolute terms or ranked against competitors. They can access analysts reports on national economies, industrial sectors, or individual companies and compare these reports from different brokerage firms. They can readily find other customers' assessments of products before they buy them, services before they subscribe to them, or resorts and restaurants before they book them. For individual firms, they can determine the level of complaints filed about their products and services, consumer litigation pending against them, or their financial stability. And they can easily determine who offers which products or services, who has products in stock or capacity to provide service, and at what price, before they book. Many of us now use this information before reserving a flight, buying a golf club, or ordering a book. Indeed, anecdotal evidence suggests that consumers comparison shop to a greater degree than ever before, simply because it is faster and easier than it ever was before.

As customers know more about what is available, from whom, and at what price, this increased transparency will heighten competition and make it extremely difficult to sell commodity-like products at a profit. That is, if there are interchangeable alternatives in the marketplace, then they will compete head-to-head for market share, and price competition will be brutal. Using the type of analysis introduced by Hotelling (1929) and Salop (1979) Bakos explores the implications of providing consumers with better information.

- In the presence of perfect information (that is, as consumers' search costs go to zero), profits on commodity products drop to zero.

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- In the presence of perfect information increasing differentiation restores manufacturers ability to earn profits. In the extreme, as consumers' preferences for an individual product increase, manufacturers recover the ability to earn monopoly rents.

Likewise, by any objective measure, corporations now know more about their customers than ever before. Specialized data can be purchased on individuals, on anything from their credit histories to statistical estimates of the probability of their litigating for medical malpractice. Government data is available on disk, providing demographic analyses by census tract. These multiple sources of public information are available for correlation with firms' private transactional histories of individuals, based both upon their activities within a single firm or pooled across firms where it is legal to do so. Moreover, these data sets can be correlated and cross-tabulated and analyzed by an ever-increasing array of data mining and customer relationship management products. Firms and organizations now use this information for direct mail targeted marketing of everything from credit cards and online brokerage services to political parties and presidential candidates. Capital One has been known in the industry for its ability to target the best credit card customers using sophisticated data-mining technology (Clemons 1998). It has become the single largest customer of the US Post Office, as part of its strategy to target customers for different products at different price points, based on its huge databases and its powerful statistical inferencing capability. DoubleClick, by tracking Internet user's surfing behavior, has built up a successful business of providing personalizing ads for individual consumers (Schneberger 2001). Numerous other examples, both of companies in traditional industries and in more recent net-based environments, can be located.

As companies know more about customers, due to their own increasing information endowment, they will know what customers want. They will be able to design products that appeal more precisely to individuals' preferences. The resulting increased differentiation will make products and services less interchangeable, reducing direct competition and increasing margins. That is, firms will be able to earn near-monopoly profits through extreme differentiation of their offerings. Note that hyper-differentiation does not imply that all firms compete to offer products and services that are **better** than each other in any absolute sense; rather, it implies that all firms compete to offer products that at least some consumers believe are **better suited** to their individual wants and preferences. While much of our analysis addresses vertical differentiation, where consumers have different budget constraints or different ability to pay (Gabszewicz and Thisse 1979; 1980; Shaked and Sutton 1982; 1983), but the analysis applies equally well to horizontal competition and encouraging increased willingness to pay. Our shorthand for competition based on meeting the desires of individual customers is **delight**, and the rest of this short paper explores the design and implementation of delight-based strategies. The paper will end with five propositions, which will serve as the basis for future research.

2. Delight

2.1. Sources of Delight

We have observed three separate sources of delight:

- Sometimes the source of delight is simple, a **perfect fit with the customer's expectations** — checking into the hotel room that is just as you remembered it, with a familiar space for each picture of your family and a familiar shelf for every item you packed; taking the first visit back to your favorite pizza shop with your daughter after your family's first four week trip out of the country. Perfect fit with expectations is not only for luxury products; a McDonald's french fry is reliably firm and crisp, a Nathan's Coney Island fry is reliably soft and almost steamed, and a cottage fry from the Palm is reliably crunchy, like a warm, thick, fresh potato chip.
- Sometimes the source of a customer's delight is a **perfect fit with his desires** — the Olympus E20N digital camera that really can take photographs that enlarge to 8x10s of the same quality as 35 mm film cameras; seeing your luggage on the carrousel after an international flight with a tight connection.
- And sometimes delight comes from the **totally unexpected extra bit of service** — on an overseas flight between Singapore and Manila, seeing your exhausted kid smile when she learned that the airline knew she was an American 7-year old and packed hotdogs, french fries, and chocolate milk for her lunch.

In one way delighting your customers does become harder to achieve the longer you provide it well. The first time a long-time customer walks into an Hérmès boutique in Paris and finds that the sales clerk has been holding a scarf for her next visit this creates delight; when the clerk says that as soon as she saw it she knew that it would be perfect, *"the design, the color, it's you!"* Even after years of working together, this is an unexpected extra bit of service. Over time, this service becomes less surprising; it becomes a perfect fit with the customer's desires, and then no more than a perfect fit with her expectations. Likewise, the first time a supplier manages to get you backordered parts in time, or the first time your hotel concierge manages to arrange meeting space in London on very little notice, you are delighted; over time, this becomes no more than a fit with your expectations.

2.2 Delivering Delight

We have observed three generic approaches to delivering delight:

- **Super-Premium and Extremely Focused Niche Players** — These are expensive enough that they do not attempt to capture significant market share, but gross margins on the product are high enough that they are profitable even without scale in marketing or operations. Walter and Sharlene Kunitake's Country Samurai coffee, which sells only their own Kona coffee and only the best grades, provides an example. Casswell and Massey's soaps, boar bristle brushes, and other beauty aids, is another.
- **Customer as Co-Designer —** This class of offering seeks to assure a higher level of delight by getting the customer involved in specifying what is to be delivered. If you have the flexibility to provide what the customer has designed, you are almost assured of delivering delight to this customer. O'Farrell's of Durango does not seek to offer all customers the same product, but rather allows them to participate in the design of their own hats if they wish. A co-designer is assured that purchases will have the exact set of features — color, style, shape, hat band — that he or she desires, and but will be charged a significant premium for this. O'Farrell's custom-made hats are significantly more expensive than their standard hats, even though both are individually hand made with the same quality and in response to individual customers' orders.
- **Supporting Multiple Niches And Offering Each Customer A Choice Designed Specifically For Him Or Her** — Learning from experience and tailoring offerings to individual customers' preferences historically could be done only by the smallest shops, boutiques, restaurants, or luxury hotels, where it was possible for the employees to remember individual customers, diners, and guests. Modern information technology allows automated provision of pseudo-intimacy, tracking customers' history so that the illusion of an equivalent level of intimacy can be created, and an equivalent level of service can be reliably and consistently provided. Perhaps the best example we have of this level of custom service being provided at a large chain is through Six Continents Club membership at the Hotel Inter-Continental. For example, the Hotel Inter-Continental in London provides champagne, in the room, on ice, with two glasses, when frequent guests check in. Over time they have learned which guests drink the Champagne when they travel with their spouses but bring it home when they travel alone. They now know to have it on ice with two glasses when these frequent guests arrive with their families; they also know to provide the bottle in a carry bag with a handle when the same guests arrive alone. This degree of service and this attention to detail pervades everything this hotel does, down to remembering to provide gingerbread men for a frequent guest with a small daughter, or remembering fruit preferences for individual guests fruit baskets.[1]

This final approach to delight has become more and more practical with the advent of information technology. Services that Goldman Sachs could once create and provide only to its private banking clients with $25 million or more in assets can now be provided by Merrill Lynch teams to much smaller investors. Likewise, the individualized customer support that was once available only at a limited number of world-famous 5-star European hotels or exclusive Fifth Avenue boutiques is now more generally available in solid middle market establishments.

3. Implementing a Delight-Based Strategy

3.1. Delight with Profitability

Implementing a delight-based strategy requires developing customers' willingness to pay a **premium** for your product or service. That is, you must offer the customers something that will delight them, and you must provide it more cheaply than they can do it for themselves. On a Singapore Airlines flight from Jakarta to Manila a passenger's daughter said sadly, *"Oh, no, Daddy, not another bad airline lunch again."* However, Singapore Airlines knew from the fare category of the ticket that the child was an American seven year-old and the flight attendant said cheerfully, *"We've brought a hot dog, french fries, and chocolate milk for you."* This

[1] We have reviewed individual guest profiles and have found comments on everything from preference in types of grapes provided in fruit baskets to customers' relative preferences for lower room rates and assured early check-in.

provided significant delight for the child, for her parents, and no doubt for all the people around her, at very little cost to the airline.

Implementing a delight-based strategy with profitability requires developing customers' willingness to pay an even **greater premium** for your product or service. The premium that customers will pay is limited by their cost of providing the same degree of delight themselves, but it is also limited by the price charged by competitors and hence by the cost that competitors experience when attempting to replicate your offerings. Thus delight with profitability requires offering customers something that will delight them, more cheaply than they can provide it themselves, and more cheaply than competitors can provide an equivalent offering.

3.2. Delight with Sustained Profitability

Delight-based strategies are likely to deliver sustainable advantage, that is, sustained, long-term, super-normal profits, only if they cannot be replicated by competitors. Of course, it is rare for a successful and profitable strategy to avoid being noticed by competitors, and it is more rare still for it to escape replication after it has been noticed. Sometimes strategies **cannot** be replicated, because they are based upon proprietary resource advantages that cannot easily be obtained; de Beers's advantage in diamond sales, due to an advantage in diamond ownership, comes immediately to mind. Other, more common sources of advantage exist when a firm's ability to deliver delight for its current set of customers cannot readily be replicated or eroded, precisely because until its customers stray from the fold no competitors know enough about the firm's customers to know what would delight them, how to deliver it to them, how much to charge them for it, or which customers are profitable enough to be offered it. That is, sustainable delight strategies are those that are based upon detailed knowledge of the customer, and that improve over time.

Strategies based upon service that improves over time might be characterized as "The longer I work with you the better gets." The longer I work with you, the more I know about you and what you want. Moreover, the longer I work with you the more I know about your profitability to me and your importance to me. As I learn and as I gain experience I am better able to provide you with delight, and I am better able to determine how to charge for delight and which customers to offer delight. My best customers should never leave me, and indeed I should expect them to seem surprised at the thought that they ever might. I'd like to believe that my best customers, if approached by a competitor, would be asking themselves, "Why would I ever leave you?"[2]

4. Guidelines for Implementing Delight

4.1. Guidelines Based on Product Attributes

TaylorMade 300-series woods and irons are high margin in part because the company has designed clubs with exceptional performance if they are fitted to the exact requirements of an individual golfer. To assure perfect fit the clubs are available with the following set of options:

- three different **clubhead shapes** (the 300 modified blade, the 320 perimeter-weighted cavity back, or the 360 extreme cavity back, to accommodate differences in golfer's skill levels and swing speeds)
- multiple **clubhead weights** (to accommodate differences in strength)
- multiple **clubhead lie angles** (to accommodate differences in height)
- multiple **clubhead loft angles** (in the drivers, to accommodate differences in swing speed)
- multiple **shaft compositions** (steel or graphite, with sub-choices among steel shafts or among graphite shafts, to accommodate differences in golfers' strength, in skill, and in swing speed, and in individual golfers' tradeoffs between distance and accuracy, or accuracy and comfort)
- multiple **shaft lengths** (to accommodate differences in height)
- multiple **grip sizes** (to accommodate differences in hand size and strength)

Combining options results in thousands of choices for drivers, hundreds of thousands of choices for irons, and an almost endless combination of clubs to delight any golfer, regardless of skill level, strength, or other physical characteristics. As TaylorMade notes in their advertising, *"For every player there is a club."* Of course, this level of delight has a price to the golfer, but experience indicates that golfers are willing to pay this price. The driver has become the hottest club on the pro tour; the irons, which were introduced later, are coming on fast. In contrast, this level of delight imposes no additional cost on TaylorMade. Clubs are always made to order, and with today's computerized logistical support systems there is no reason why having the club builder choose a specific

[2] Indeed, Richard Thaler's work on the "Winner's Curse" [1994] suggests that if a company is able to win a customer away from an incumbent that is using its information properly, it is probably because the attacker is making a mistake in pricing its services or in the service levels and features that it is offering. An incumbent should know what its accounts are worth to it, and often an attacker making a better offer is simply being victimized by errors in its targeting mechanisms.

clubhead, shaft, and grip combination should significantly increase manufacturing complexity or manufacturing costs[3].

4.2. Customer-Focused Guidelines

Three more bullets provide important reminders when implementing delight-based strategies:

- **Delight is easy to ruin.** The location of the controls in some airlines' sleeper seats, right under your elbow when sitting down, is less than ideal, and provides unpleasant surprises to customers sitting down with a cup of coffee; although these controls are less than delightful they are neither more nor less expensive than BA's much more user-friendly location.
- **But delight does not need to be expensive to deliver.** At O'Farrell's each hat is individually hand-made, and thus in a real sense every hat is a custom hat. A co-designed custom-fitted hat is no more expensive to produce but carries a significantly higher price-tag, because the co-designed hat does deliver superior customer delight. Likewise, allowing airline passengers to pre-reserve specific meals increases the customers' satisfaction since they are not told that "due to prior passenger selection" your choice of entree may not be available. However, to the extent that pre-selecting meals reduces the airline's need to carry entrees that will not be eaten, it may actually reduce the airline's expense.
- **And delight from a scarce product or service can be bundled to sell more plentiful products at a profit.** Special lift tickets at Vail, offering "first run down the mountain," can be bundled with and included in the price of suites at the Lodge or other properties. Someone is going to enjoy the first run down the slope after an overnight fall of fresh powder, and the suites may not always be rented at a premium price if last-minute guests without reservations are upgraded to whatever rooms are available when the house is full. But if booking the suite is the only way to get the first run down, then a scarce resource (first run) is being used to sell a less scarce resource (suite with two fireplaces), delivering delight to the skier at a higher profit to the owners of the lodge.

[3] Dewan et. al. (2001) suggest that the Internet allows firms to provide targeted advertising to individual consumers. Their model shows that this "narrowcasting" allows firms to gain additional sales from customers that otherwise would not purchase.

5. Who Does It Well And Who Will Need To?

5.1. Who Has Already Mastered Delight-Based Competition?

Probably no one currently executes delight-based strategies as well or as fully as we anticipate will eventually be required. The best major airlines and casinos track the profitability of each customer, but provide only limited differentiation of their offerings to their best customers. All compete for the same customers using the same strategies and the same basis of competition.

There are occasional bright spots. Singapore Airlines' ***Book the Cook*** program allows a first class passenger or business class passenger to delight himself by choosing Nasi Lemak, or Veal Loin, or Lobster Thermidor, for example, while American Express's Platinum Concierge service can provide fantastic support for a stranded traveler or to a card-holder searching for a perfect gift for a business associate. But even these two offerings are marred by inconsistent execution. During the summer of 2001 Singapore Airlines' web pages could take over two hours to load, and their ground support staff in the far East were not always be able to speak adequate English over the telephone. American Express has a maddeningly long and inconvenient touch-tone menu, which is ghastly if you are standing at the airport with one foot in a limousine and one foot out on the sidewalk in front of check in, trying to figure out if you should make the driver take you back to your hotel after American Airlines has canceled all flights back to Philadelphia and you are desperately hoping that the American Express Concierge emergency travel assistance can book you a connection home that night via Chicago.

5.2. And Who Will Have To Master Delight-Based Competition?

Anyone who cannot compete solely on the basis of cost and price will need to master delight-based competition. Current examples already include full service airlines attempting to compete against no-frills airlines. The no-frills carriers enjoy lower labor costs, less expensive hub locations, and lower operating expenses. More to the point, these carriers can survive service interruptions that would be catastrophic to the reputations of full service carriers, since unlike full service carriers they are seldom the first choice of the most demanding business passengers. While the no-frills operators cannot economize on safety they can indeed cut costs on all other aspects of operational robustness. This provides them with yet another cost advantage, but it does leave them vulnerable to well-executed delight-based strategies targeted at a more demanding, higher revenue customer base.

Likewise, anyone who does not want to survive on the narrow margins available in more traditional strategies will need to create differentiation, offer delight, and charge accordingly. Cantor Fitzgerald, a market maker in bond trading, once described surviving on the spreads in their business as "living between the walls and the wallpaper." This is not a niche that many of us would welcome!

6. Channel Conflicts

Old channel conflicts were about retention of profits: how were profits going to be divided among manufacturers, distributors, and retailers? In airlines, for example, the struggle has been among the airlines themselves, the reservation systems operators, and the agencies. Newer channel conflicts were over maintaining positions in the distribution channel: would there still be a need CRS operators or would airlines control their own inventory? Would there still be any need for travel agencies, or would airlines bypass them and sell directly to their best corporate accounts and leisure passengers? These channel conflict issues were described in two earlier papers by Clemons and Row [1992,1998]

The newest channel conflicts, which are still emerging, are over control over the information needed to deliver delight and to preserve superior margins. Account executives and financial consultants in securities firms are extremely reluctant to use information systems for customer-support that are provided by the home office. That is because their income is dependent upon providing service to the customer, each time the customer trades; if the customer's loyalty switches from the account exec to the firm, then the exec's ability to command a premium is reduced and the firm's ability to retain a larger share of trading income is enhanced. Similar conflicts are becoming visible between travel agents and the hotels and airlines they book, and no doubt will emerge in an increasing range of products as well.

7. Summary and Conclusions

Competition on price, based on achieving lowest costs, or competition on any single measure of quality, or competition based on accurate precision pricing, is inherently self-limiting. Cost containment, quality products and services, and a sound pricing strategy are all strategic necessities, but since none provides a sustainable basis for differentiation, none provides sustainable competitive advantage. Moreover, the customer's increasing information endowment heightens competition among commodity products; thus lack of advantage — doing no better than industry average performance and earning no more than industry average profits — is not going to be doing well at all.

In contrast, delight-based competition reduces such direct comparisons and thus reduces head-to-head competition. Products are neither comparable on any single dimension, nor even on their entire attribute set; because of the great differences between them, products are also not directly substitutable for each other. Delight-based competition creates mini-monopolies and near-monopolies. Unlike commodities, where information endowment is the enemy of profits, in delight-based strategies information endowment provides the mechanism by which a customer decides to pay more for a product that precisely meets his or her needs. Firms will need to learn to make more skillful use of information to provide this level of tailored delight, but emerging strategies and emerging technologies combine to make this possible to an ever-increasing number of firms, and to make delight available to an ever-increasing number of customers.

Perhaps paradoxically, despite firms' higher profits, their customers will also be better off. This is because customers will receive precisely what they want, products and services that far more closely meet their ideals. They will obtain great value for their money. They, like the firms that sell to them, will be delighted.

8. Propositions for Future Research

We offer the following propositions as a summary of the preceding work. Examination of these propositions and conditions under which they do or do not obtain will be offered in a later paper:

1. **As the consumer's information endowment increases their willingness to pay for products increases.** (That is, as **consumers** know more about product and service offerings and about their precise combination of attributes and quality levels they are willing to pay more for them), This is easy to show in the presence of consumer risk aversion (c.f. Keeney and Raiffa, 1976), or with utility functions for products that decrease in value faster than linearly as actual product attributes differ from consumer's ideal choices.
2. **As information increases and consumer's willingness to pay increases, consumer surplus increases.** That is, manufacturers cannot capture all the value that consumers derive from making

better-informed choices. This results from the strategic balance between increased consumers' willingness-to-pay and increased competition in the market.

3. **As manufacturers' information endowment increases, incumbents gain a greater advantage over new entrants.** That is, manufacturers are able to target product and service offerings to individual consumers with more precision and accuracy than new entrants could do, and as information increases incumbents have both more information on what to offer each customer and more flexible technology for actually producing it.
4. **As information available to consumers and manufacturers increases, manufacturers' surplus increases.** This is because an increase in information endowment increases consumers' willingness to pay at the same time that it weakens perfect competition among manufacturers. Consumers are willing to pay more, and the absence of perfect competition assures that at least some of the resulting surplus is captured by manufacturers and service providers.
5. **As information available to consumers and manufacturers increases, steady state analysis becomes less relevant.** Consumers change their purchasing decisions more rapidly in response to available offerings. Service providers change their offerings in response to changes in consumer preferences.

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