A Comparison of Customers' Readiness For Mass-Customisation: Turkish vs. British Customers

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Abstract

This paper examines customers' readiness for mass-customised products in two European countries, Turkey and the UK. Although the theory of mass-customisation has received considerable attention in recent years, the emphasis has been on identifying and classifying the ways in which mass-customisation can be implemented efficiently and effectively. The aim of this study is thus to begin to explore how far customers are "ready" for mass-customised products in two European countries, using the new car market as its basis for analysis. In doing do the study examines the demand side of the market and begins to explore whether mass-customisation can be implemented as an international product strategy. It also attempts to link the theory of the globalisation of markets with the theory of mass-customisation. Results suggest that a sizeable section of the market in each country is ready to accept the "inconveniences" of mass-customised products, with Turkish respondents more enthusiastic overall for the advantages which mass-customisation can bring. However, the main inconvenience of mass-customisation is identified as possible increased price, even for "ready" customers.

Keywords: mass-customisation; global products; globalisation; Europe; new car market

Introduction

The aim of this study is to examine customers' readiness for mass-customised products in two European countries, Turkey and the UK. In doing do the study examines the demand side of the market and begins to explore whether mass-customisation can be implemented as an international product strategy. It also attempts to link the theory of the globalisation of markets with the theory of mass-customisation.

Since Levitt (1983) argued that advances in technology in relation to transport and communication were the drivers of the globalisation of markets there has been much debate on the feasibility of globally standardised products. Pine's (1993) theory of 'mass-customisation' appears to contradict the globalisation approach, however. According to Pine (1993) people are no longer willing to sacrifice their preferences in return for consistent quality at low prices, but are looking for exactly what they want and need and are willing to pay extra to obtain it. Moreover, with advances in computer aided manufacturing, economies of scale can be achieved with a small batch size, and even individual products can be provided cost effectively. Based on this premise, a number of theoretical works have emerged in the literature which identify and classify the ways in which mass-customisation can be implemented efficiently and effectively (see, for example, Pine, 1993; Lampel & Mintzberg, 1996; Gilmore & Pine, 1997; Andersen, 1997; Feitzenger & Lee, 1997). However, these works assume that customers are ready for mass-customisation, without presenting evidence from systematic research that this is indeed the case.

Customers' Readiness for Mass-Customisation

It is not the aim here to present a detailed review of the literature on mass-customisation. This has been undertaken elsewhere (Bardakci and Whitelock, 2003). Rather the aim is to focus on a comparison of customers' readiness for mass-customisation, as identified through exploratory research undertaken in Turkey and the UK. Pioneering applications of mass-customisation have suggested three major inconveniences that customers are likely to face: mass-customised products are more expensive than standardised products (Moffat, 1990; Kotha, 1995); a customised product cannot be delivered to the customer at the time of purchase (Davis, 1996; McKenna, 1995); and, since the customer initiates the design process, the customer is required to invest time in 'designing' the product (Pine, Peppers & Rogers, 1995). Thus, customers' readiness may be determined as follows:

- Are customers willing to pay a premium for a customised product?
- Are customers willing to wait to receive their customised product?
- Are customers willing to invest time in “designing” the product?

Readiness may be defined through a positive response to all three questions. This is to say that, provided customers are willing to accept all three inconveniences of mass-customisation, they will be considered to be “ready” for customisation (Bardakci and Whitelock, 2003).

A related concept is the issue of customer customisation sensitivity (Hart, 1995). Two basic tenets determine customer customisation sensitivity, the uniqueness of the customer’s needs and the customer sacrifice gap. Uniqueness of the customer’s needs is a function of the relevant demand pattern. If the demand pattern is primarily functional (such as the demand for table salt), customers do not care whether they are offered customised solutions or not. On the other hand, if the demand pattern is innovative customers are more likely to pay attention to customisation. The customer sacrifice gap is the gap between the desired product and available products in the market. All kinds of sacrifices fall into this category: hassle, inconveniences, discomforts, long queues, product deficiencies, high cost, ordering difficulties and so on. The bigger the gap the more the customers are sensitive and the more customisation becomes a desirable strategy (Peppers & Rogers, 1993; Hart, 1995; Gilmore & Pine, 1997; Peppers & Rogers, 1997). This customer customisation sensitivity suggests additional research propositions.

Research propositions

RP1: Customers’ in today’s market are no longer willing to relinquish their preferences in return for low price but are looking for exactly what they want. As a result customers will be willing to pay a premium for a customised product.

RP1 rejects the idea found in the globalisation of markets literature that customers’ are willing to relinquish their preferences for the sake of consistent quality at low prices. Thus, an examination of this proposition is important in relation to both theories as, depending on the findings, it would produce support either for the theory of globalisation or for the theory of customisation.

A rationale behind the premise of price premium is that customers perceive higher value in custom-made products (Flynn, 1999), because customised products more closely meet their exact needs and desires (Pine, 1993). Provided those needs and desires are met appropriately it is likely that a high level of satisfaction will be found. When a high level of expected satisfaction is achieved it is claimed that price is no longer important for customers (Peppers & Rogers, 1997). However, willingness to pay a premium may be related to disposable income and experience of the product. Thus, with a higher disposable income and a more mature car market, it may be that customers in the UK will be willing to pay a higher premium than customers in Turkey.

> **RP2:** Customised products are less likely to become a finished product at the point of sale. Nevertheless, customers are willing to wait a reasonable period of time to receive their custom made products.

When the customer is given the opportunity to "design" the product from among thousands of potential combinations, the customer is involved in the new product development process. Once the customer is incorporated into the chain, it is, in many cases, less likely that the finished product will be physically available at the point of sale, as is also pointed out in the postmodernist marketing literature (i.e., Firat, *et al.,*1995; Firat & Shultz, 1997). It has been argued that waiting for a custom made product adds to the customer's anticipation and excitement (Moffat, 1990). However, a difference in response is expected between the UK and Turkey. In Turkey, the top selling car brands are routinely offered as a standard package with no options other than colour of body paint. As a result, delivery is normally possible within one day of purchase. However, in the UK market waiting for delivery is common. Thus, a difference is expected between these two countries.

> **RP3:** Customers are willing to invest a reasonable amount of their time at retail outlets to specify their preferences when ordering genuinely customised products, at least on the first occasion.

Customers' involvement in the firm's value chain obliges them to spend some time in enumerating their preferred attributes, either by attaching favoured attributes to a tangible product or by detaching non-favoured ones from the augmented product. The amount of time required hinges on the level of customer involvement in the value process as 'prosumer'. Although it is not necessary to spend time at retail outlets for every type of product (e.g. computers) when measurements need to be taken (as for shoes and clothes) the customer needs to be available at the retail outlet at least for the first order. After a satisfactory product delivery customers may give their further orders through an array of options, including the Internet, instead of in person.

> **RP4:** Under a system of mass-production and mass-marketing consumers are forced to accept standard mass-produced products due to the absence of more appropriate products in the market. Therefore, in the current market there is likely to be a customer sacrifice gap which will favour mass-customisation.

In the current market, most businesses know that they cannot be all things to all people thus product proliferation is used as an attempt to please multiple segments. However, for a given customer an offer may be 'too hot' or 'too cold', even when the wish is to offer a product that is 'just right' (Iabucci *et al.,* 1994). From the customers' point of view a standardised product is bought due to the absence of more appropriate ones (Harris, 1985; Whitelock & Pimblett, 1997). Thus, customer sacrifice gaps are likely to be found and it is suggested that the larger the customer sacrifice gap, the greater the success of implementing mass-customisation (Hart, 1995; Whiteley & Hessan, 1996; Gilmore & Pine, 1997). However, Turkish top selling car brands are offered as basic products that aim only to meet basic transportation needs. The best selling brands of Tofas (Fiat's Turkish subsidiary) and Oyak-Renault (Renault's Turkish partner) do not even include power steering, airbags or ABS. It is anticipated as a result that the customer sacrifice gap will be greater in Turkey than in the UK.

> **RP5:** The higher the number of alternative products, the more difficult is the customer decision to buy.

The product-centred mass-production and marketing approaches drive customers to hunt for a single product or service from among an ever growing number of alternatives (Pine, Peppers & Rogers, 1995). Given the number of alternative brands aiming to fulfil almost identical needs and desires in the market, the customer receives a relatively high amount of information about the available alternatives. When these alternatives have similar or identical attributes, consumers have to evaluate more attributes than may be important for them, leading to a more difficult buying decision process. However, within the same segments of the car market, the number of available options is higher in the UK than in Turkey. Thus, it may be expected that the effect of product proliferation on the decision process will be greater in the UK.

> **RP6:** Customers prefer customised products since it gives them the opportunity for price adjustments.

Although it is hypothesised that customers are willing to pay a premium for a custom made product, financial limitations may restrict choice whatever the customer requires in a finished product. In the case of Japanese housing, for instance, when preferred attributes and specifications for a prefabricated house exceed the customer's budget the computer aided design system allows the company to bring the cost to a desired level based by altering specifications (Kotler, 1989). In this case the price element has become another customisable element of the marketing mix (Logman, 1997). Due to the differences in income levels between British and Turkish respondents it may be anticipated that this advantage of mass-customisation will be more important to Turkish respondents than to UK respondents.

> **RP7:** Customers appreciate customised products since they do not have to pay for attributes that they do not like.

In conjunction with price adjustments, another strength of mass-customisation may be that customers do not have to pay for attributes that they either do not like or do not need. Hewlett-Packard (HP) for example does not package standard cables in printer boxes due to different needs regarding length and technical requirements. The resulting savings are passed on to customers (HP, 2001). For the reasons given above (RP6) this advantage is expected to be more important in Turkey than in the UK.

> **RP8:** Customers are positive about mass-customised products since they have the opportunity to update individual product details over time.

When modularisation is applied to the customisation concept it enables customers to alter, add or detach any attribute over time. Although changing some attributes is currently possible in the case of cars in the UK (such as alloy wheels, for example), in Turkey these options are offered by different firms rather than by the car manufacturers, and have their own warranty and guarantee packages. In this situation customers have to buy the augmented product as it exists, make changes as required and effectively throw away the original parts and pay for the new ones. This adds to the price of the car. The frequency of car ownership in Turkey is lower than in the UK. As incomes are also lower, this advantage is expected to be more important in Turkey, where a car may be owned for a longer time period, than in the UK.

> **RP9:** The customer's inability to test the product before purchase is perceived to be a weakness of mass-customisation.

When modularisation comes into play in most cases customers do not have the ability to try out or to see a physically finished product before owning it. The lack of physical product makes the order taking process vitally important. On the company side, anything that customers are unhappy with would be costly for the company since a custom made product is less likely to be sold on to any other customer. On the customer side, after receiving a product they are unhappy with, customers would have to wait again to receive a customised replacement.

> **RP10:** Customisation is appreciated by customers because it promises to provide the exact product that is desired by the individual.

Finally, the basic premise for mass-customisation is that customers can have the product exactly as they want it, by eliminating unwanted attributes and not having to pay for them. Thus the ability to provide the exact product is considered to be the major strength of the concept of mass-customisation.

Methodology

The new car market was selected for study as it can be said to present the conditions of demand fragmentation and market saturation that are argued to favour mass-customisation (Pine, 1993; Kotha, 1995; Kotha, 1996). Moreover, the auto industry has radically changed its ideas about manufacturing twice in the last century, firstly with Ford's system of mass-production and secondly with Toyota's lean production in Japan. Finally, this is a global industry and a comparative study of the potential for mass-customisation of cars in the UK and Turkey has implications for global marketing and competition. European countries are often assumed to be similar in terms of stage of economic development, the nature of marketing infrastructure and industry conditions, encouraging firms to standardise their marketing efforts across markets (i.e. Buzzell, 1968; Jain, 1989). However, wide differences can be observed within the European arena between very highly and less highly developed market economies. A study within the UK and Turkey may provide evidence of those differences at the customer level and signal the need for caution in the uniform use of either globalisation or mass-customisation strategies.

The aim was to conduct research among a population defined as " all persons interested in buying a brand new car in the lower-medium, super-mini and upper-medium categories of cars (which represent the largest segments of the automobile market in terms of new registrations). A questionnaire was developed and pre-tested with sales executives in three car dealers in Manchester, UK, and also with potential car purchasers in two dealers which were not subsequently included in the full research study. The draft questionnaire was administered through personal interview with respondents' completing it themselves in the presence of the interviewer, except in the case of one dealer who refused permission for this but instead administered the questionnaire to customers to complete while they were waiting in the showroom. A total of 7 responses were received in this way, as a result of which minor changes were made to one question to improve clarity. A total of 800 questionnaires were subsequently distributed through car dealers and 58 responses received over a five month period. Follow-up phone calls and facsimile messages to those in the dealerships who had agreed to co-operate revealed that questionnaires had been distributed to their prospects. Follow-up of these prospects was not possible, since questionnaires had been distributed by the dealers on the strict understanding that prospects would remain anonymous.

The questionnaire was translated into Turkish by the second author, a Turkish native speaker, and was administered to respondents in İskilip, a province of the city of Çorum. Fifty questionnaires were distributed to a convenience sample of respondents who were all identified as considering buying a new car in the next two to three years, and who differed in their occupations, level of disposable income, and education level. Thirty-seven usable replies were obtained over a three-week period.

Problems in obtaining research data in international marketing have been much discussed in the literature (see, for example, Cavusgil 1987). Steenkamp and Hofstede (2002) comment on the difficulties of sampling equivalence. Clearly, the sample in the UK differs from that in Turkey in terms of method used and profile from which the sample is drawn. However, Kumar (2000) comments that the stress should be on "the equivalence of the information collected from the sample [s]", rather than on sampling frame. Consequently, we believe it is appropriate to compare the data we have collected from these two countries.

The questionnaire consisted in the main of self-rated, non-comparative single-item rating scales used to assess respondents' level of agreement or disagreement with statements relating to the benefits and disadvantages of customised cars, to their satisfaction with standard features and to the difficulty of choice between many alternative models. Dichotomous (yes/no) questions were used for each of the three constructs of price premium, design time and waiting time, with a multiple choice question added to each to allow the construct to be quantified. Additional dichotomous questions (relating to features which are disliked but which the customer is prepared to accept and sex of respondent), multiple-choice questions (relating to age, education, marital status and occupation) and open-ended questions (relating to make, model and date of purchase of current and next car) were also included.

Findings

Figure 1 indicates that 57.1% of the UK sample and 75.68% of the Turkish sample are prepared to accept the three inconveniences of mass-customisation and hence may be regarded as "ready" for this product strategy. Multivariate analysis of the three variables - increased price, wait time and time spent in design – indicates that Turkish respondents are more frequently ready than British respondents for mass-customisation (chi-square = 3.34, p = 0.07, Alpha = 0.73). However, individual analysis of the three variables shows that increased price is the differentiating variable, as indicated in the discussion of findings in relation to research propositions below.

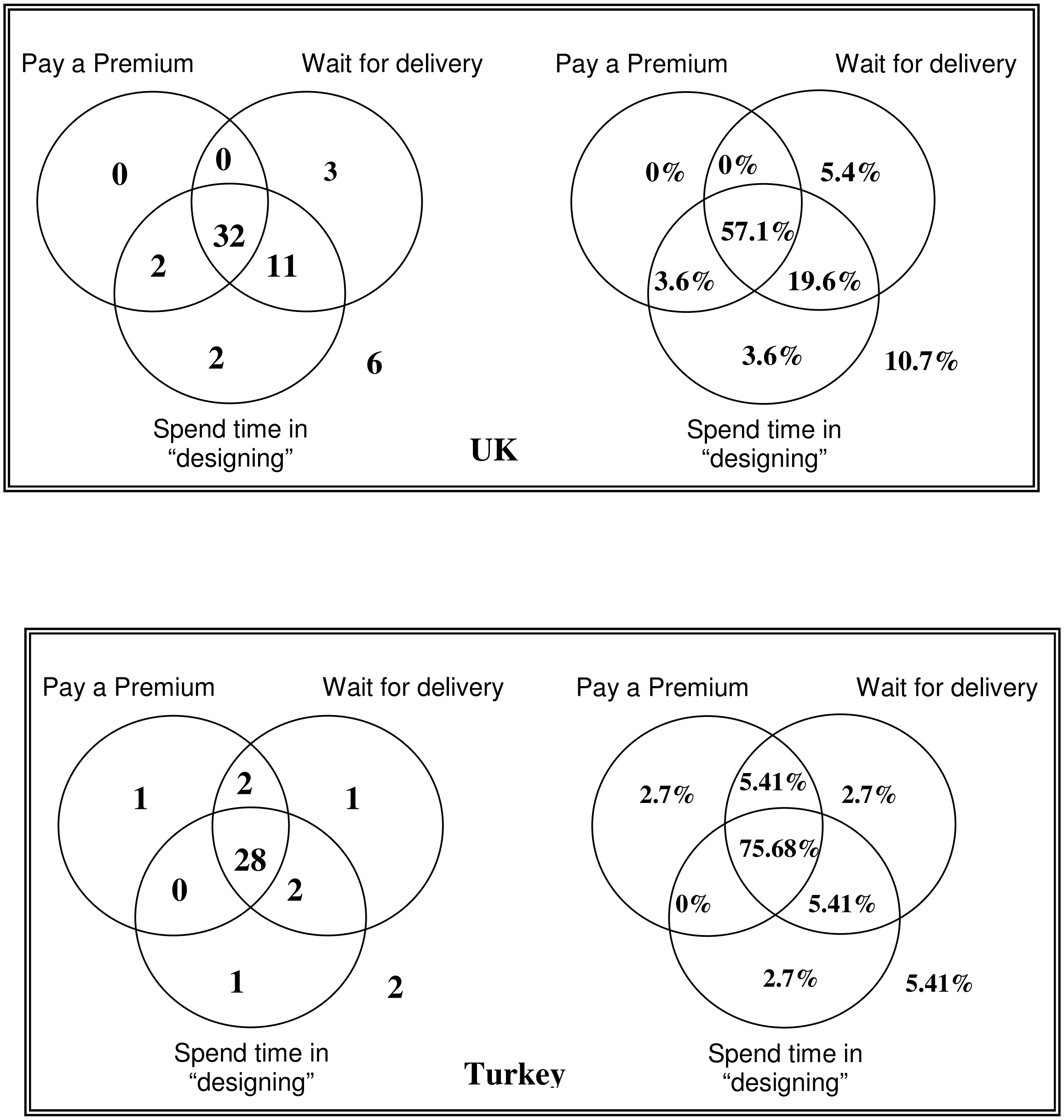

Figure 1: "Ready" customers in the UK and Turkish samples.

RP1: Customers' in today's market are no longer willing to relinquish their preferences in return for low price but are looking for exactly what they want. As a result customers will be willing to pay a premium for a customised product.

Examination of the data (Table 1) reveals that there is a significant difference in terms of willingness to pay a premium between the UK and Turkish samples (p = 0.02). It was expected that, given the higher standard of living in the UK, British respondents would be more likely to be prepared to pay extra than Turkish respondents. However, the reverse is the case. One reason for this may be that a car is more of a luxury product in Turkey than in the UK and Turkish customers may be excited at buying such a product. As a result, they may prefer to buy a product that suits their exact requirements and to pay more to achieve this.

	No	% within country	Yes	% within country	Total
UK	22	39.3	34	60.7	56
Turkey	6	16.2	31	83.8	37
Total	28	30.1	65	69.9	93

Chi-square: 5.64, p-value: 0.02

Table1: Are you willing to pay a premium for a customised car?

RP2: Customised products are less likely to become a finished product at the point of sale. Nevertheless, customers are willing to wait a reasonable period of time to receive their custom made products.

RP3: Customers are willing to invest a reasonable amount of their time at retail outlets to specify their preferences when ordering genuinely customised products, at least on the first occasion.

Again, there is no significant difference between respondents in the two countries in relation to the need to spend time in designing their mass-customised car, with 84% of customers in both markets willing to do so.

RP4: Under a system of mass-production and mass-marketing consumers are forced to accept standard mass-produced products due to the absence of more appropriate products in the market. Therefore, in the current market there is likely to be a customer sacrifice gap which will favour mass-customisation.

It is clear that a customer satisfaction gap is perceived in both countries as 68.4% of British and 91.9% of Turkish respondents feel that they have to accept unwanted features (Table 3). However, Turkish customers more frequently agree that they are forced to accept products with features which they do not like (chi-square=7.12, p=0.01). This finding is also consistent with the multivariate analysis of the readiness framework.

	No	% within country	Yes	% within country	Total
UK	18	31.6	39	68.4	57
Turkey	3	8.1	34	91.9	37
Total	21	22.3	73	77.7	94

Chi-square: 7.12, p-value: 0.01

Table3: Thinking now of your favourite car, is there anything you dislike, but you would accept because of other features?

> **RP5:** The higher the number of alternative products, the more difficult is the customer decision to buy.

There is no significant difference in the findings between the two samples with the majority of the respondents (78% in the UK and 67.5% in Turkey) agreeing with this proposition.

> **RP6:** Customers prefer customised products since it gives them the opportunity for price adjustments.

One of the potential advantages of mass-customisation is that it enables customers to adjust the price by removing and not paying for product attributes which they do not require. The difference between the Turkish and UK responses is highly significant (p=0.001), with this trait being considered more important by the Turkish respondents than by the British respondents (Table 4). However, when only those customers who are ready for customisation is analysed, the difference is not significant (p=0.839), with both groups of respondents considering this important.

	n	Mean	Std. Dev.
UK	56	4.607	1.4854
Turkey	36	5.417	1.386
UK ready	31	5.161	1.2409
Turkey ready	28	5.232	1.417

Table 4: I would prefer customisable cars since it provides me with price flexibility

> **RP7:** Customers appreciate customised products since they do not have to pay for attributes that they do not like.

There is a highly significant difference between Turkey and the UK (p=0.01) in regard to responses as a whole. Again, however, when ready customers are analysed the results do not differ significantly (p=0.37). In both countries ready respondents evaluate this advantage as important (p=0.001 for both countries) (Table 5).

	n	Mean	Std. Dev.
UK	56	4.750	1.8315
Turkey	37	5.742	1.6803
UK ready	31	5.226	1.4074
Turkey ready	28	5.605	1.7794

Table 5: I would prefer a customisable car because I will not have to pay for the features that I do not want.

> **RP8:** Customers are positive about mass-customised products since they have the opportunity to update individual product details over time.

Another advantage of mass-customisation may be thought to be the opportunity for product update. Products are likely to be modular allowing customers to remove an obsolete component and add a new version of the component, as is common in the personal computer industry. The difference between countries as a whole in this regard is again highly significant (p=0.001) (Table 6). This may simply be the result of differences in the planned period of use of the product in each country. The mean planned period of use over all respondents is 5.58 years among Turkish respondents and only 3.60 years in the UK sample. Similarly the difference is also significant for ready customers (p=0.001). The average planned period of use for a ready customer in Turkey is 5.18 years, while it is 2.83 years in the UK). It may be concluded that since the planned period of use is longer in Turkey, the opportunity to update the product may assume more importance for Turkish respondents.

	n	Mean	Std. Dev.
UK	56	4.2320	1.8190
Turkey	37	5.459	1.6
UK ready	31	4.935	1.5261
Turkey ready	28	5.554	1.442

Table 6: I would prefer customisable car because I would have the opportunity to change almost every detail by adding, detaching or replacing them over time.

RP9: The customer's inability to test the product before purchase is perceived to be a weakness of mass-customisation.

The inability to test the exact product is not considered as a major weakness by the respondents in either country, with no significant difference in the findings between the two countries.

RP10: Customisation is appreciated by customers because it promises to provide the exact product that is desired by the individual.

The basic idea behind the theory of mass-customisation is that of responding to each customer as an individual so that the individual preferences can be met. The difference however, between Turkey and the UK is significant in regard to the overall responses. Turkish respondents overall are more positive towards the concept of mass-customisation as a means of providing the exact product they require ($p = 0.001$) than their British counterparts. However, in terms of ready customers the difference is not significant ($p=0.33$), with both groups of ready customers (unsurprisingly) positive towards mass-customisation (Table 7).

	n	Mean	Std. Dev.
UK	56	4.857	1.8134
Turkey	37	6.027	1.236
UK ready	31	5.71	1.296
Turkey ready	28	6.036	1.239

Table 7: I would prefer a customisable car because I would get exactly what I want from engine to floor mats

Limitations of the Study and Directions for Further Research

This study raises a number of questions. Firstly, it is exploratory in nature and was limited in terms of research sample. Consequently, generalisations cannot be made and further research is needed to verify the findings. However, examining the views of customers from more than one country has allowed our decision framework and research propositions to be tested outside the single-country domain. Secondly, readiness for mass-customisation is, of course, a twofold concept concerning both the demand and supply sides of the market. As such, the focus on the customer, although justified by the lack of previous research attention paid in this regard, attempts to explain only one side of the equation. How far the organisation is ready to adopt a mass-customised approach is a further question to be answered requiring further research. Future research in contexts other than new cars should also be undertaken. Mass-customisation in relation to other products may produce different results, with the three key considerations weighted differently depending on the nature of the product and the level of required customisation. Finally, we have focused on "readiness" for mass-customisation and do not attempt to provide any link between this "readiness" and behavioural intentions. This is, of course, an important issue that may be addressed by future studies.

Discussion, Conclusions and Recommendations

This paper compares the findings from two exploratory studies undertaken in Turkey and the UK which examine how far customers' are "ready" in practice for mass-customised products in the context of the new car market. Three inconveniences that customers are likely to face were identified and formed the framework for the research. Firstly, although it is suggested in theory that mass-customised products might be offered at the price of mass-produced products, pioneering applications indicate that mass-customised products are more expensive than standardised products. Secondly, a mass-customised product cannot be delivered to the customer at the time of purchase. Finally, since the customer initiates the design process, the customer must spend time 'designing' the desired product. As a result "customers' readiness" has been operationalized in this research as the acceptance by customers of all three considerations.

A summary of the findings in relation to the research propositions is presented in Table 2. Overall, the findings do not differ significantly between the two countries and suggest that a large proportion of customers from both countries would be willing to pay extra to own a product which exactly meets their needs and preferences. However, more respondents in the Turkish sample were willing to do so than in the UK sample. This may be the result of the customer sacrifice gap, which seems to be higher in Turkey than in the UK. Additionally, Turkish respondents were keen to update the features of their car over time, a fact which is favourable to mass-customisation as a concept. This may be the result of the propensity to keep cars for a longer time period than in the UK.

	Research Hypotheses	Results
RP1	Customers will be willing to pay a premium for a customised car	Supported for both countries, support from Turkey is more evident
RP2	Customers are willing to wait to a reasonable period to receive their custom made car	Supported for both countries
RP3	Customers are willing to invest a reasonable period of their time at retail outlets to specify their preferences	Supported for both countries
RP4	In the current market there is likely to be a customer sacrifice gap which favours mass-customisation	Supported for both countries, support from Turkey is more evident
RP5	The higher the number of alternative products, the more difficult is the customer decision to buy a particular product.	Supported for both countries
RP6	Customers prefer customised products since it gives them the opportunity for price adjustments.	Supported for both ready and not ready respondents from both countries. There is no mean difference between ready customers
RP7	Customers appreciate customised products since they do not have to pay for attributes that they do not like.	Supported for both ready and not ready respondents from both countries. There is no mean difference between ready customers
RP8	Customers have a positive attitude towards mass-customised products since they have the opportunity to update each detail over time.	Supported for Turkish customers. Support from ready Turkish customers greater

RP9	The inability to test, before purchase, exactly what a customer has chosen is a weakness of mass-customisation.	Rejected for ready customers in both countries.
RP10	Customisation is appreciated because it promises to provide the exact product that suits individual needs	Supported in both countries

Table 2: S**ummary of research propositions and findings**

The research suggests that there may be a viable market of customers for mass-customised cars, in both the UK and Turkey. An element by element examination of this framework revealed that payment of a premium is the most important consideration for mass-customisation since the proportion of the sample that is willing to pay such a premium is the smallest. However, possible increased price is not the only variable involved in determining customers' readiness. Producers now need to examine the price that would be acceptable to customers and whether such a price would be sufficient to offset any additional costs that may be incurred in offering a mass-customised product.

An advantage of mass-customisation for respondents in Turkey, where the customer satisfaction gap is greater, is found in regard to the opportunity for price adjustment, where attributes which are outside the customer's budget constraints can be excluded from the product. The opportunity to update the product over time is also important for this group, probably as a result of the fact that the planned replacement period for a new car in Turkey is long relative to the mature UK car market, where respondents plan to replace their cars rather than to update them. In the UK, a segment of customers who are 'ready' for mass-customisation seems also to have been identified. However, the findings also suggest that there is a sizeable segment of customers looking for a low price, hence standardised and mass-produced, product. Therefore it may be concluded that, for cars at least, mass marketing is by no means dead. Mass-customisation might be implemented in the UK to increase competitive advantage over global rivals without a complete shift to mass-customisation being necessary or desirable. In both countries, the high number of products available hinders the decision process for customers in terms of finding the right product. In such market circumstances collaboration with customers through mass-customisation may solve the problem, as customers will not have to pay for product features that they do not want, an advantage favoured by "ready" customers.

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