Customizable cars - a transitory hype or the future of the automobile industry?

A study of customization in the automobile markets of China, India and the United States

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Abstract

Customization is a growing trend in several markets, ranging from a few customizable options to bespoke offerings where products are tailored completely according to the customer's taste. The Company (anonymized) on which this study is applied, a large automobile manufacturer in Sweden, are noticing the trend of customization in the automobile as well as in many other markets, and have requested an investigation of whether they too should implement such an offering. The Company believe that an extended customization offering (that is, an increased level of customizability compared to the limited options of for example exterior colors usually available in standard car offerings of today) rather than complete bespoke will be the best fit given their price range and brand image, and that such an offering will strengthen their brand. For these reasons, this study investigates possible demand for an extended customization offering along with the customer values that should be delivered, as well as whether the offering will in fact strengthen the Company brand. A pre-study has identified China, India and the United States as promising markets, hence this study is limited to the markets of these countries.

This study addresses the research questions by exploring three different perspectives; the customer, the supplier, and the branding perspective. The customer perspective includes interviews and questionnaires with general potential customers as well as experts on the luxury car markets of the three addressed countries, with the aim of verifying demand for an extended customization offering. The supplier perspective in turn uses secondary industry data to assess the prevalence of customization offerings already being offered in both the automobile as well as other markets; luxury yachts, luxury watches and retail. Finally, the branding perspective compares the values offered by an extended customization offering to the Company's intended brand repositioning to determine if the offering strengthens the brand. To assess the values delivered by the offering and the values prioritized by the customer groups, this study uses the customer perceived value tool (CPVT) which defines the utility, uniqueness, self-expressiveness, hedonic and creative achievement values. Further, theory on luxury goods, national cultures and branding strategies are used.

This study finds that an extended customization offering has weak support from the customer perspective, that is, there is little identified customer demand. There is however support from the supplier perspective, as customization offerings in varying degrees are increasingly offered by actors in a broad range of industries. Finally, from the branding perspective, this study finds that the values of an extended customization offering do not align with the Company intended brand repositioning. That is, an extended customization offering is not deemed to contribute to a strengthened Company brand. Combining all three perspectives, an extended customization offering has inconclusive support and is not deemed to strengthen brand image. That is, the findings of this research suggest extended customization of cars is likely a trend among suppliers and not necessarily the future of the automobile industry.

Keywords: Customization, Bespoke, Automobile, Luxury goods, Branding strategy, China, India, United States

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Table of Contents

1. Introduction

This chapter introduces the purpose of this study. First, the background and problem description of the study are presented, followed by the findings of a pre-study as well as the research questions and delimitations.

1.1 Background and Problem Description

“The Company” (anonymized) is a large car manufacturer in Sweden, producing cars for several different markets and customer groups with different price ranges. One of their areas of operations are premium cars which they currently sell with only a few customizable features, as a result of a previous customer inquiry, performed by The Company, which showed that customers prefer simplicity in the design process of their cars. Recently, however, The Company suspect that bespoke services, i.e. customized or tailor-made goods, are trending in the automobile industry as well as other industries including yachts, luxury jewelry and more. For this reason, The Company want to investigate whether there is a demand for bespoke, and if so, who the customers are. The Company’s intent in offering a customization service is however not mainly to increase volumes, but rather to strengthen their brand. That is, the final offering needs to fit with the brand image that The Company want to portray.

The term bespoke in its strict meaning refers to complete individualization and comes from the tailoring of suits to the customer’s exact measurements and taste – an extreme form of customization. The Company however believe that perhaps not a complete bespoke offering, but rather a higher degree of customization, from here on referred to as “extended customization”, will be a better fit for The Company since complete bespoke offerings tend to be very expensive and thus are a better fit for extreme luxury cars such as Rolls-Royce or Bentley. The Company’s hypothesis is that an extended customization offering, if adopted, will be best fit for their luxury cars, as also such an offering is believed to bring increased variation costs which require higher prices, and since the luxury car market is believed to be less price sensitive. However, they still want to investigate the possibility of implementing the customization service in any product line. The aim of this study is thus to explore potential customers of an extended customization offering and to investigate whether it will in fact strengthen The Company’s brand.

To study this issue, we depart from the customers and their needs rather than from the design of the offering itself, as it is customer needs that should guide the design. The first step is thus to identify and explore the customer groups that may be interested in a customization service. From there, information from the potential customers enable the following steps of defining the offering. As will be presented in this report, the markets of China, India and the United States have been identified as target markets through a pre-study consisting of initial, internal interviews with eight relevant Company employees and an initial literature study. The results from the initial interviews are presented in chapter 1.2 Findings from Initial Interviews, while the results of the initial literature study are found in chapter 3.4 Cultures of Identified Markets.

Once the customer groups are identified, we also need to identify what the customization service should entail. Therefore, we conduct interviews with target customers and experts to explore what values the customers seek. The Company have previous support for the idea that exterior color and interior design, such as seat fabric and veneers, is of great interest to customers interested in customization. However, these beliefs need to be verified and complemented with other possible customer priorities.

From here, this report continues with presenting the findings of a pre-study consisting of initial, internal Company interviews. Further on, the research questions and the delimitations of this study are presented. The following chapters then present the research design and methodology, followed by literature, empirical findings, analysis and finally a conclusion along with suggestions for further research.

1.2 Findings from Initial Interviews

Initial interviews with the eight Company employees are conducted to identify underlying assumptions which are then formed into hypotheses to be tested through this research, as will be described in 2.1.1 Identifying Hypotheses and 2.1.2 Hypotheses Formulation. The hypotheses include for example what markets are best suited for a customization offering, where most interviewees believe that mainly China, India and the U.S. markets are suitable. Further, all interviewees believe that a customization offering is suitable for high-end cars, while half see potential also in medium class segments. All interviewees believe that the offering is suitable for “very rich” customers, but several also believe in a customer segment with a medium economic power where customers due to special interests are willing to spend proportionally larger amounts of money on their car. Aesthetic features such as exterior and interior colors are believed to be the main priorities among customers, followed by the car brand. Further, the selling point of the customized car is believed to be the achievement of the perfect car, that is, the final result is in focus rather than the fun and excitement the customer gains from the process of designing something on their own. The full list of hypotheses is presented in the Appendix.

1.3 Research Questions

Given our aim of exploring potential customer groups for an extended customization offering, and investigating the effect of such an offering on The Company’s brand, the following research questions are addressed in this research:

1. Is there a demand for an extended customization offering among the identified customer groups in China, India and the United States, and if so, what should the offering entail in terms of customer values?
2. Will an extended customization offering in fact strengthen the Company brand?

1.4 Delimitations

One part of the aim of this study is to explore potential customers of an extended customization offering, but in order to make this study viable with respect to the given resources and time, the scope of this study is limited to the Chinese, Indian and American markets, as noted in the research questions. These three markets are chosen due to their presence as potential markets in the results of the pre-study. This implicates that there may exist a demand for customization beyond these markets which are not identifiable due to the delimitations of this study.

2. Research Design and Methodology

The overall approach of this study is deductive, defined by Bryman and Bell (2015) as departing from theory, formulating hypotheses from the theory and then testing them with empirical data. In this study, hypotheses are indeed formulated from theory and internal Company intelligence and then tested to see whether they hold. However, some parts of the study are of inductive nature, i.e. making inferences from empirical observations (Bryman & Bell, 2015), as success of bespoke or extended customization offerings by both automobile competitors and in other product markets are used as proof of concept, supporting the idea that bespoke or extended customization may be successful for The Company as well. This study is thus neither completely deductive nor inductive.

This chapter describes the methods used to address the research questions as described in 1.2 Research Questions, including:

- Interviewing appropriate people with knowledge regarding the demand for customization in the three identified markets, including experts and potential customers native to those countries.
- Mapping the competitive landscape within automobile bespoke and extended customization through investigating competitors' offerings.
- Mapping the prevalence of bespoke or extended customization offerings in other relevant product markets.
- Comparing The Company's brand strategy with existing theory on branding strategies to determine whether an extended customization offering in fact will strengthen the brand, as hypothesized by The Company.

The following subchapters outline the work process, from defining the customer to developing the offering, followed by sampling, literature study and analysis of results.

2.1 Data Collection

As explained in the introduction, The Company believe that bespoke and extended customization services are trending in the automobile industry and they thus want to investigate whether there is a market opportunity for an extended customization offering on one or more product lines, and if so, who the customers are. Initially, neither the customer group nor the offering are defined, enabling several potential combinations of offerings and customer groups that can be viable. The Company request an open, unbiased investigation of potential customers for their customization offering, and that the offering is adapted to fit the identified customers, but it is evident that several assumptions about who the customers are and what they want are affecting the way that The Company are operating today. To ensure that false assumptions are not directing The Company's resources in a suboptimal way, these assumptions need to be tested so that a correct picture of who the customer is can emerge. Alvarez (2014) presents a method for identifying potentially divergent assumptions in an organization and effectively testing them so that the target customer can be mapped. In the first two steps, which are performed in this study, the internal assumptions should be identified so that they can be clustered and used to formulate falsifiable hypotheses about the customer. Alvarez (2014) emphasizes that assumptions need not to be correct, instead the value comes from them being expressed explicitly so that incongruities within the organization can be identified. The assumptions should therefore first be written down individually, before the discussion starts and the assumptions are clustered according to their topics (Alvarez, 2014). From these clusters, hypotheses are formulated so that they can either be validated or falsified as quickly as possible, to maximize learning about the customer. Since internal hypotheses can be validated or falsified in a concrete way, decision makers obtain more correct information on which to base their future decisions, instead of making decision based on information they assume is accurate.

2.1.1 Identifying Assumptions

In accordance with Alvarez's (2014) customer development guide, initial, individual interviews are held with Company employees from relevant departments, to identify assumptions which could be formulated into hypotheses. Each employee gets to answer a set of questions regarding who the customers are, what they prioritize, how they purchase cars and more. These answers constitute the assumptions within The Company. In this way, we obtain a starting point for the development of potential customer groups. That is, both in accordance with The Company's flexibility of the offering itself according to potential demand from customer groups and with Alvarez's (2014) approach in customer development, we choose the customer development as the point of departure for finding a match between customer demand and design of the customization offering, rather than starting with optimizing the design of the offering and then proceed to finding a customer fit. These interviews are conducted on a fairly unstructured form, which Bryman & Bell (2015) state is beneficial in cases where the focus of the research is rather vague since the researcher then runs a lower risk of imposing their own views and expectations on interviewees. Indeed, Bryman & Bell (2015) argue that the researchers have a better chance of seeing things as the interviewees see them if they choose an unstructured interview at this point.

2.1.2 Hypotheses Formulation

After conducting the initial interviews with the eight Company employees, the resulting assumptions are analyzed and clustered according to their topics. Along with each assumption, the frequency of that assumption is also noted. From those clusters, the following step in Alvarez's (2014) customer development guide is initiated: hypotheses (as found in the Appendix) can be formulated from the clusters of identified assumptions. That is, for each cluster of assumptions we assign a hypothesis in the form of a falsifiable statement. Along with each hypothesis, we also note how much support each hypothesis has within The Company based on the frequency of the assumption underlying that hypothesis. In some cases hypotheses are conflicting, allowing only one to be correct, e.g. whether customers want many or few options for each customizable feature, while on other topics several hypotheses can be correct, e.g. that there could be a market for extended customization both for the premium segment and for a less premium, mass market product line.

2.1.3 Testing Hypotheses

After completing the hypotheses formulation, we proceed to testing the hypotheses through interviews with members of the top two identified markets; China and India. According to Bryman and Bell (2015), interviews are the most commonly used method in qualitative research. Interviews can be divided into quantitative or qualitative interviews, where qualitative in turn can be categorized into unstructured and semi-structured interviews. Structured interviews in turn belong with quantitative interviews. Bryman and Bell (2015) state that qualitative interviews are preferred when the researchers are particularly interested in exploring the interviewee's own perspectives. This is noted also by Easterby-Smith, Thorpe and Jackson (2015), who state that both unstructured and semi-structured interviews are suitable when researchers aim to understand the interviewee's world view, and that they often tend to yield more personal responses. Further, the interviewer gains access to nonverbal clues, such as facial expressions or the tone of voice, which can serve as inspiration for additional questions (Easterby-Smith et al., 2015). For example, while the wording of questions is set in quantitative interviews in order to achieve greater reliability and validity, it is more flexible in qualitative interviews so that follow-up questions can be asked and tangents be explored (Bryman & Bell, 2015; Easterby-Smith et al., 2015). Since the focus of this study at this point is to understand the customer and the way they think and act, it becomes clear that the qualitative interview is the better choice.

Easterby-Smith et al. (2015) note that completely unstructured interviews, without a guide or direction from the interviewer, may yield poor data which are difficult to interpret since the interviewee does not know what the interviewer wants to know, and since the interviewer is unsure of what questions the interviewee is answering. Therefore, researchers may have more success in being clear about the focus areas of the interview. When deciding between the unstructured and semi-structured interview, Bryman and Bell (2015) further note that a more semi-structured interview is beneficial if the researchers have a somewhat clearer focus rather than simply performing research on a topic. This is indeed the case with the hypotheses testing - at this point, this research has come further in the sense that an approach for identifying customers has been set and thus there are more specific questions to be answered. For this reason, we choose to perform semi-structured interviews when testing hypotheses on the Chinese, Indian and American markets. However, Bryman and Bell (2015) describe how it is most common that interviews end up anywhere on a spectrum between the completely unstructured and the semi-structured interview. As a contrast to the hypotheses testing, in the earlier, assumptions-identifying interviews with Company employees the unstructured interview is a better fit since the research at that point is less focused and more explorative to its nature. Bryman and Bell (2015) however note that a completely unstructured interview can take the form of a casual conversation, which as described is warned against by Easterby-Smith et al. (2015) due to the risk of yielding poor data, and which is not the case in the interviews with Company employees. Those interviews are in such a comparison still closer to the semi-structured end of the spectrum, but less structured than the student interviews as we initially aim to extract as many underlying assumptions as possible.

In addition to interviews, surveys in the form of self-completion questionnaires are distributed to American Company customers who have been invited to the Company site in Sweden as an additional service to their car purchase, thus testing the hypotheses on the third identified market; the United States. The customers offered this deal are purchasers of models that The Company's employees deem to be representative of the segments that could be interested in customization. The decision of sending out self-completion questionnaires is made as to increase the likelihood of response, since asking for an in-person interview may be perceived as too demanding by customers. While Easterby-Smith et al. (2015) state that self-completion questionnaires may yield low response rates due to the lack of personal contact to encourage participation, Bryman and Bell (2015) note that self-completion surveys are more convenient for respondents than an interview since the respondents can choose when and where to answer the survey. As The Company's customers are invited to Sweden for their factory delivery, it would be reasonable to think that visitors would rather complete a survey prior to their visit than devoting their time in Sweden to being interviewed. To increase the response rate, The Company employees responsible for the customers' visits are also helpful in encouraging the customers to respond, which is beneficial since they already have an established relationship. A finishing question is also added to the survey, asking customers if they would however be interested in an additional interview upon their arrival to the Company site. The interviews with the customers who agree to an additional interview are held continuously as they arrive for the collection of their cars.

Finally, additional interviews are conducted with people with relevant knowledge within the area of interest. These interviewees are forwarded by The Company and include three Company-employed experts on the Chinese premium automobile market, two Company-employed experts on the Indian premium automobile market, one Company-employed expert on the U.S. premium automobile market, and a brand strategist from The Company's brand department. The results from the interviews with the Chinese, Indian and American premium market experts are found in chapters 4.1.1.2 Expert Interviews on Chinese Premium Customers, 4.1.2.2 Expert Interviews on Indian Premium Customers and 4.1.3.2 Expert Interview on American Premium Customers, respectively, while the results from the interview with the brand strategist is found in chapter 4.4 The Company brand.

2.1.4 Secondary industry data

Additional to the customer development with interviews described in the previous chapters, empirical data from secondary sources are collected to explore the competitive landscape of customization within the automobile market, as well as the prevalence of customization offerings in other product markets. The competitive landscape of customization is mapped through gathering information from competitors' websites and information found online, with assistance from an internal business analyst at The Company. Customization offerings in other product markets are identified through online sources, usually in the forms of news articles and trend reports.

2.1.5 Sampling

The hypotheses formulated after the first, internal set of interviews, are tested through both interviews and surveys. The Chinese and the Indian markets are tested through interviews with exchange students and Company experts on premium customers, while the U.S. market is tested through both surveys and interviews with existing Company customers as well as an interview with a premium customer expert. The first, initial interviews are held with a sample of Company employees in line with Alvarez's (2014) method for customer development where the first step is to identify assumptions. The samples for the consecutive interviews and the survey are however not set by a specific theoretical guide.

There are several different sampling methods, according to Bryman and Bell (2015), including purposive sampling which is frequently used in qualitative research. Purposive sampling means that the sample is selected according to the aim of the study, so that the research questions can be answered (Bryman & Bell, 2015). A vastly different sampling strategy brought up by Bryman and Bell (2015) is convenience sampling where sources of information are gathered based on their availability to the researchers, which may well bring greater response rates and serve as springboards for further research but also has problems with generalizability since it is unclear what population the sample is representative of. A third sampling method, snowball sampling, is based on referrals from initial interviewees who are identified as important to the research, and can be seen as purposive sampling in the sense that relevant interviewees can be referred to by other relevant interviewees with similar characteristics (Bryman & Bell, 2015). However, Bryman and Bell (2015) argue that snowball sampling can also be seen as convenience sampling in the sense that they are conveniently suggested by available interviewees, and thus just like convenience samples have problems with generalizability. Sampling in ethnographic research is however at times a combination of convenience and snowball sampling, since researchers often have to rely on whichever sources are available (Bryman & Bell, 2015). This is precisely the case in this research - limited access to local resources in the identified markets of interest forces us to rely on sources that may share some, but not all of the characteristics identified in the key customers. For example, interviews with exchange students are conducted with the purpose of them being from the countries of the identified markets, even though they likely lack the economic power that usually characterizes customers of premium cars. However, there is still a chance that their parents, being able to offer their children international academic exchange studies, would have such economic power. The exchange students can also be seen to be selected through snowball sampling, as some of them gave us suggestions of other exchange students to interview. The exchange students are thus selected through purposive sampling, even though a better sample would be actual members of the identified customer group - thus the sampling is partly based on convenience due to limited resources. Similar to the exchange students, the Company customers surveyed and interviewed when collecting their car in Sweden are also purposeful to the study in the sense that they belong to a target customer group both in terms of residence and economic power, but at the same time convenient as they already made the decision to visit Sweden for their factory delivery. The fact that they already are customers to The Company may further imply that they share characteristics that are not representative of the wider population of customers with their country of residence and economic power. That is, also the U.S. sample is partly based on convenience and thus may not be representative of the U.S. target market. The same is true for the interviews conducted with Company experts on Chinese, Indian and American premium customers - they are all purposeful to the study but also convenient in that they work at The Company. Finally, the interviewed Company employees in the initial interviews likely have a worldview specific to The Company, which would be different had they worked at another company.

In conclusion, the sampling strategy aimed for in this study is purposive sampling since specific target markets defined by internal interviews need to be investigated. However, in some respects the purposive sampling method needs to be adapted to gather enough information to answer the research questions. For these reasons, the sampling methods used in this research come to be purposive sampling combined with convenience sampling.

2.2 Theoretical framework

A theoretical framework is assembled alongside the data collection and is developed and revised continuously. Literature is reviewed to gain a better understanding of the subject and to guide the next steps in the research, just as the research and subsequent findings create demand for further theory search. That is, the theoretical framework and the findings are both developed over the course of this study.

The following sources and services are used to find suitable literature for both theory and empirical data:

- Google Scholar search engine
- Chalmers' University of Technology's library service
- The library of economics at the University of Gothenburg
- The Company's internal reports
- Online trend reports from various websites
- Information from competitor websites

2.3 Analysis

The analysis of empirical findings against the theoretical framework is in this report divided into three blocks of evidence for or against The Company offering extended customization. First, we provide the customer perspective, based on the interviews with Chinese and Indian exchange students as well as American overseas delivery customers, and on interviews with experts on the associated premium markets. This perspective provides primary data from a demand perspective to assess the attractiveness of an extended customization offering by The Company. Second, the supplier perspective presents secondary data which provide arguments for or against an extended customization offering based on the extended customization or bespoke offerings of other automobile manufacturers as well as of actors in other industries. This perspective investigates whether the idea of extended customization has support from the supplier side. Finally, to assess whether an extended customization offering will in fact strengthen the Company brand, an analysis from the branding perspective is provided. These three analyses provide arguments for and against The Company offering an extended customization offering, and are finally considered collectively when drawing conclusions and answering the research questions of this study.

3. Literature

Departing from the aim, four different topics are identified as relevant for the study and will constitute the theoretical frame. First, since China, India and the U.S. are found to be suitable markets for luxury goods, theory by Tynan, McKechnie and Chhuon (2010) on luxury goods and what luxury customers seek is used in this study. Further, Merle et al.'s (2010) consumer-perceived value tool and Yoo and Park's (2016) application of such are used to identify what values customers seek in a possible extended customization offering. Branding strategies by Aaker (2012), Aaker and Biel (2013), Kapferer (2012) and Vincent (2012), among others, are used to evaluate if and how an extended customization offering will affect the Company brand. Finally, Hofstede et al.'s framework on the six dimensions of national cultures is used to explain potential differences in preference between China, India and the U.S.

3.1 Luxury Goods

There are several different definitions of luxury goods, but a common denominator is that a luxury good is not necessary, but is pleasant for the customer to have, and that the good is costlier than the necessity (Collins Dictionary, 2017; Business Dictionary, 2017; Cambridge Dictionary, 2017).

According to Tynan, McKechnie & Chhuon (2010), a high utilitarian value is merely a hygiene factor for luxury goods, while symbolic/expressive and experimental/hedonic values are the differentiators between different luxury brands. It is thus not enough to provide a superior product – luxury brands must provide their customers with an experience to differentiate themselves. The real value, Tynan et al. (2010) argue, is achieved in the co-creation process where the brand owner, the customer, the employees and other social groups, including for example customer brand communities, engage. The co-creation process enables input from the different parties, in turn enabling customers to obtain exclusivity, prestige and access to privileged information. Such interaction has become a main differentiator for all the companies in Tynan et al.'s study. However, Tynan et al. (2010) also recognize that different customers will want different levels of involvement with the brand.

All markets investigated in this report are deemed as suitable for luxury goods. For instance, the Chinese luxury market is one of the largest in the world and also one of the markets with the highest growth rate (Luxury Society, 2016). Moreover, the U.S. luxury market was the world's largest in 2015 (The Guardian, 2015), and the same year Americans spent more money on luxury goods than the Chinese, Japanese, French and Italians together (Nielsen, 2015). Finally, the Indian market, like the Chinese, has experienced a growth in sales of luxury goods in the last years and is expected to continue growing (Wall Street Journal, 2015).

3.2 Mass Customization and Brand Value

An ongoing trend in the luxury industry is mass customization (Luxury Society, 2014), i.e. when a retailer offers their customers individually tailored products or services. Merle, Chandon, Roux, and Alizon (2010) however argue that merely offering a mass customization program may not suffice for success, and that many failures of such programs are due to insufficient attention to consumer values in favor of production techniques. For this reason, Merle et al. present the consumer-perceived value tool (CPVT) which comprises five values the customer gains from mass customization. These values are divided into mass customized product values, valuable for any mass customization strategy, and co-design process values which are appropriate only for strategies that include co-design.

Mass customized product values include the utility, uniqueness and self-expressiveness of the product. Utilitarian value is obtained when the product has the preferred aesthetic and functional features of the customer. Uniqueness value further adds to the perceived product value by enabling the customer to be individual and to stand out from others, while self-expressiveness value comes from the benefit of possessing a product that reflects the customer's personality and self-image. That is, while the uniqueness value comes from standing out from others, self-expressiveness value stems from the customer's self-image. Additional to the mass customized product values, Merle et al. (2010) present the two co-design process values; hedonic and creative achievement values. Hedonic value is acquired from the joy, fun or pleasure from the customization process itself, and the wish to have an exciting experience has been shown to be linked to the willingness of engaging in a mass customization program. Finally, the creative achievement value relates to the feeling of accomplishment from having engaged in the creative co-designing process. That is, creative achievement can be described as a "pride of authorship", even in cases where the co-design toolkit is limited so that the creative freedom has significant constraints.

Yoo & Park (2016) apply the Merle et al. CPVT tool to investigate what customer values affect satisfaction, and whether satisfaction ultimately affects brand value. Yoo & Park keep the uniqueness value as an external factor but use the remaining four out of five customer values along with a sixth, social value, and find that the values which have a significant effect on satisfaction vary with customer characteristics. In Yoo & Park's specific study, the characteristics altered are the need for uniqueness (from Merle et al.'s uniqueness value) and past brand loyalty. However, regardless of the values that affected satisfaction, Yoo & Park find that satisfaction in turn has a significant effect on brand value, which is why a company that aims to improve their brand should aim at improving customer satisfaction. However, the strategy for improving satisfaction has to be altered depending on the customer characteristics. The company must therefore know who their customers are, and it can be argued that other characteristics besides need for uniqueness and past brand loyalty will affect the values affecting customer satisfaction.

3.3 Branding Strategies

This chapter explores how different brand concepts are related and how they ultimately affect business, which are used to evaluate the effect of extended customization on the Company brand. As explained by both Kapferer (2012) and Grant (2010), a brand is one of the few long lasting and sustainable strategic advantages that a company can enjoy. The brand is an intangible asset and can as such only be used in combination with products or services in order to be monetized, meaning that a brand holds little value by itself (Kapferer, 2012).

Vincent (2012) argues that a brand should have a brand promise that fits the company's products or services - the experience of the products of a brand should match the expectations promised by the brand. If the brand promise and product experience are mismatched, the credibility of the brand decreases which in turn will hamper brand consideration when customers are considering a purchase (Vincent, 2012). Furthermore, Vincent (2012) argues that a brand must sacrifice some features in order to excel in others - that is, a brand cannot promise "everything to everybody" since that will only lead to a mediocre offering that will be surpassed by more focused competitors. Indeed, Kapferer (2012) suggests that if a brand consists of several different sub-brands or products, it is important that they all share the same core identity. If they do not share a common core identity, the brand may be perceived as incoherent should the sub-brands evolve in different directions (Kapferer, 2012).

Aaker (2012) defines brand equity as the value of the brand, which can either add or subtract value from a product of that brand. Indeed, a strong brand can enable premium pricing of the company's products or services (Leek & Christodoulides, 2011). According to Aaker and Biel (2013), brand equity is in turn driven by brand image, which can be defined as the attributes and associations that consumers perceive as connected to the brand name. Aaker (2012) further argues that knowing how your customers perceive your brand is important for optimizing decision making when aiming to improve the brand identity, which according to Aaker (2012) entails what the brand stands for, resulting in a promise to its customers - i.e. similar to Vincent's (2012) brand promise. In summary, brand identity is deliberately shaped by the company to convey a desired brand image, while the brand image is the actual customer perception resulting from branding activities conducted by the company along with, according to Rindell and Iglesias (2014), the customers' previous experiences of the brand. Lee, Lee and Wu (2011) argue that a strong brand image improves brand loyalty, which can lower costs of marketing as a brand with high loyalty is able to maintain current customers to a higher degree. Loyal customers also create higher barriers to entry for competitors, further reducing marketing costs while increasing costs for new entrants (Lee et al., 2011; Grant, 2010). Aaker (2012) also notes that brand loyalty affects brand equity, meaning brand image affects brand equity both directly, as noted by Aaker and Biel (2013), and indirectly through brand loyalty. The relations between the abovementioned brand concepts and a company's business are illustrated in figure 3.1. To conclude, a company aiming to improve their brand equity needs to develop a brand identity that favorably differentiates the brand from competitors, while ensuring that the brand identity (or promise) is credible in relation to customers' experiences of the products and the brand. Both a strong brand identity and credibility are thus necessary for obtaining a strong brand image, which subsequently will result in improved brand equity and improved business.

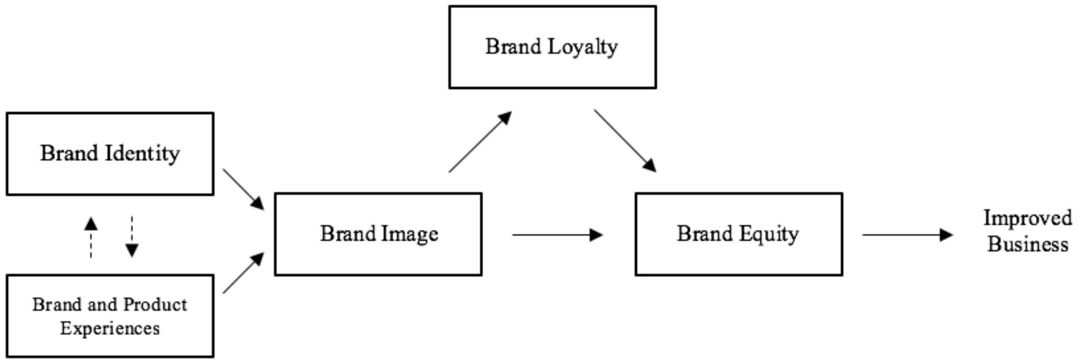


Figure 3.1. The relations between brand concepts ultimately affecting a company's business.

3.4 Cultures of Identified Markets

According to Hofstede, Hofstede and Minkov (2010), the culture a person belongs to decides how that person reacts to different experiences, how feelings are manifested and partly also the person's preferences. Culture is shared on a group basis, learned and passed on from the older generations, which in the context of this study implies that what a person expects from a car is influenced by the culture of the group to which they belong. However, Hofstede et al. (2010) note that culture is not the single predictor of behavior and preference: a person's mental programming consists also of human nature, universal to all mankind, and personality which is specific to the individual. Referencing the theories of Hofstede et al., Fang (2012) further explains that every culture holds paradoxical beliefs, similar to the yin yang principle which means that there cannot exist an extreme without the existence of its opposite. For example, a society that is very individualistic will also hold collectivistic beliefs to some extent, meaning that the way Hofstede et al. describes cultures might be too unilateral. Further, the Hofstede et al. (2010) culture indexes are averages of each country, thus not taking in consideration that the culture can vary between different social classes or other subgroupings. However, Hofstede et al.'s (2010) work will act as a facilitator in the comparison of China, India and the U.S. as potential markets for a customization offering, since the framework may help explain unexpected differences between the countries. The following chapter will explain the dimensions of national culture as described by Hofstede et al. (2010).

3.4.1 Dimensions of National Culture

Hofstede et al. (2010) identify six dimensions in which culture can be compared; power distance, individualism, masculinity, uncertainty avoidance, long term orientation and indulgence.

Power distance is explained as the extent to which people belonging to a culture are willing to accept differences in power between individuals, translating into equality in all instances of society (Hofstede et al., 2010). A culture with a high degree of power distance would for example be willing to accept that a manager takes on a more autocratic role, while a culture with a low degree of power distance would prefer the manager to use a more democratic leadership. Further, there is a wish for more centralized decision making in cultures with high power distance, according to Hofstede et al. (2010). The degree of power distance in a culture impacts the education system and the roles of teachers, where the students in a low power distance culture are expected to take more own initiatives than those in a higher power distance culture. In the healthcare system, this phenomenon manifests itself in the physician - patient relationship: for example, elderly care in a culture with high power distance is to a higher degree expected to be provided by the family. Lastly, the distribution of wealth is more uneven in cultures of high power distance (Hofstede et al., 2010).

Individualism is the degree to which individuals in a society are expected to care for themselves and their own interests as well as how strong and fixed relationships between people in different groups within the society are. The lower end of the individualism scale is called collectivism and is characterized by a stronger group memberships, where people are expected to be loyal to the same group throughout their lives (Hofstede et al., 2010). The relationships of people in collectivistic societies are predetermined by the family or group and the group also influences the beliefs or preferences of its individuals to a higher extent than in an individualistic society (Hofstede et al., 2010). Individualism also measures the degree of work-life balance, where individualistic societies tend to prefer jobs with less work hours than collectivistic societies. Furthermore, people with an individualistic culture tend to prefer challenging jobs where they can choose their own approaches, whereas people in collectivistic cultures tend to prefer jobs where they have good opportunities for training, have good physical working conditions and where they are allowed to fully utilize their skills (Hofstede et al., 2010). Overall, individualistic cultures prefer independency while collectivistic prefer interdependency.

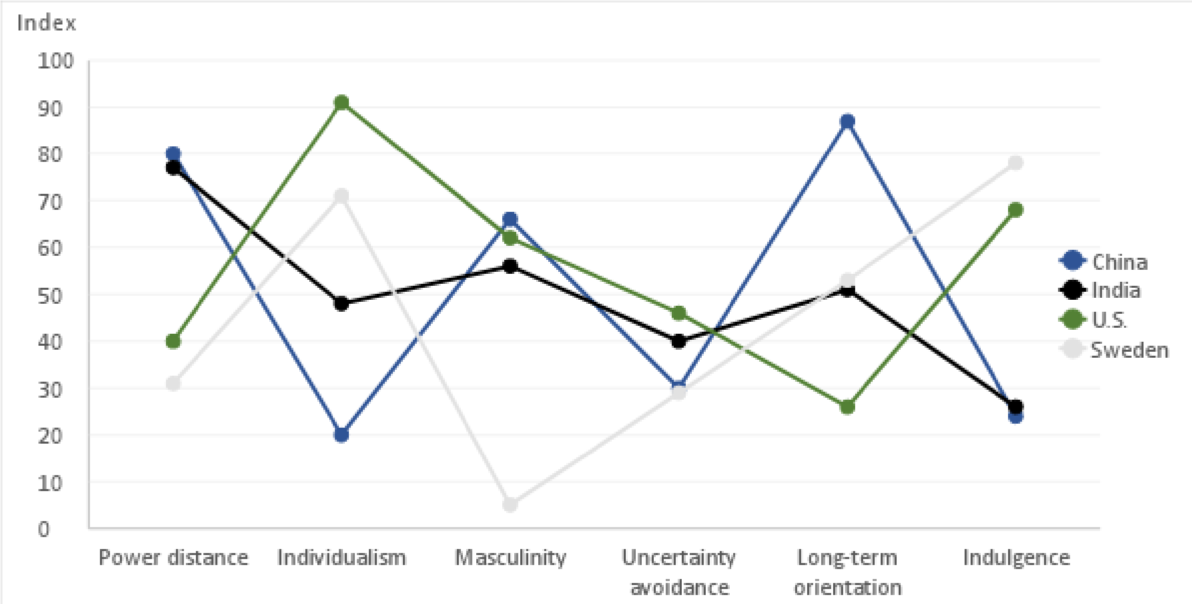
Masculinity is partly a measure of how competitive individuals of a culture are as well as how they value relationships with other people in the workplace and outside (Hofstede et al., 2010). It also measures gender equality. A person belonging to a masculine culture would for example value a job with opportunities for high earnings, recognition and challenge, while a person belonging to a feminine culture, i.e. low degree of masculinity, would rather value a job where they have good relations with their superiors and co-workers and enjoy a higher work security (Hofstede et al., 2010). Outside of work, individuals of feminine cultures, i.e. with low masculinity, tend to be more modest and have more balanced roles within their families as both parents share equal responsibilities in terms of child care and work, whereas individuals of more masculine culture tend to have more traditional gender roles where the husband works and the wife takes care of the children (Hofstede et al., 2010). Regarding shopping, people of masculine cultures are more prone to buy expensive watches and jewelry and prefer foreign goods, while people of feminine cultures tend to spend more money on their homes (Hofstede et al., 2010).

Uncertainty avoidance measures how comfortable people of different cultures are with unknown or ambiguous situations (Hofstede et al., 2010). People in cultures with high uncertainty avoidance tend to have an emotional need for rules, both at work and in everyday life, as well as a need for formalization and precision (Hofstede et al., 2010). Individuals in a culture with low uncertainty avoidance are comfortable with having less rules and are not as intimidated by the unknown. People in high uncertainty avoidance cultures also have a tendency to buy new cars or use professionals for repairing their cars, while people with low uncertainty avoidance rather buy used cars to fix themselves (Hofstede et al., 2010).

Long term orientation is a measure of how traditional people in a culture are as well as the length of their economic planning horizon (Hofstede et al., 2010). As an example, people of short term oriented cultures tend to spend their money while people of long term oriented cultures tend to save it. Furthermore, short term oriented people prefer quick results while long term oriented people are willing to wait longer before results occur (Hofstede et al., 2010).

Indulgence is a measure of how restrained or indulgent individuals in a culture are. People in cultures with high indulgence are more optimistic and extrovert, and value leisure and enjoying themselves to a higher degree than people of restrained cultures, who instead value thrift, are more cynical and have a higher rate of people with neurotic personalities (Hofstede et al., 2010).

Figure 3.2 summarizes the cultures of the three countries along with Sweden as a comparison. The reason for including Swedish culture is to understand the differences between the cultures of the identified customer groups and that of Sweden, since both The Company and the researchers have a Swedish frame of reference. Indeed, according to Hofstede et al. (2010) it is important to create a neutral vantage point from which the different cultures can be assessed, since the way we perceive other cultures is dependent on our own cultural affiliation.



	Power distance	Individualism	Masculinity	Uncertainty avoidance	Long term orientation	Indulgence
China	80	20	66	30	87	24
India	77	48	56	40	51	26
U.S.	40	91	62	46	26	68
Sweden	31	71	5	29	53	78

Figure 3.2. The cultures of China, India, the U.S. and Sweden represented by the six dimensions of Hofstede et al. (2010).

The following subchapters will describe the basics of Indian, Chinese and American cultures from a Hofstede et al. (2010) perspective with the aim of explaining what buyers from these cultures prefer in their cars, and how they differ from each other.

3.4.2 People's Republic of China

China is the largest country in the world, however in spite of the large population the culture is still quite uniform, with 92 percent of the population belonging to the Han Chinese ethnicity and the remainder belonging to the country's 55 minorities (Countries and their Cultures, 2017). Chinese values and traditions are influenced by the importance of family relationships, rituals and education (Ancient History Encyclopedia, 2017).

In the Hofstede et al. (2010) study, China is found to have a high power distance index (80), which implies that there are large power inequalities in the country together with an uneven distribution of wealth. This means that the Chinese middle class should be small and that the population consists of a majority of poor people together with a minority of very rich people (Hofstede et al., 2010). Hofstede et al. (2010) also find that China has a low individualism index (20) meaning that the Chinese society is quite collectivistic, which implies that they are highly influenced by other members of the groups they belong to, resulting in high interdependence between individuals. The culture is somewhat masculine (66), which means that there may exist gender inequalities, that the Chinese people value money and prosperity and that they are willing to show it off by buying expensive watches, jewelry and the like (Hofstede et al., 2010). The uncertainty avoidance index is found to be fairly low (30), implying that Chinese handle uncertain situations quite well, that they generally rather buy second hand cars than new ones, and that they tend to repair them by themselves when they break (Hofstede et al., 2010). The long term orientation index of the Chinese is very high (87), indicating that Chinese are thrifty and seek long term gain rather than short term (Hofstede et al., 2010). Lastly, the indulgence index of the Chinese is low (24) which means that the Chinese are somewhat restrained and thrifty, and are not as likely to spend money on amusement (Hofstede et al., 2010).

When comparing Swedish and Chinese culture, the greatest differences are power distance, individualism, masculinity, long term distance, and indulgence. The uncertainty avoidance indexes of the two cultures are however similar. These differences manifest themselves through that Swedes could perceive Chinese as autocratic, non-egalitarian, interdependent, competitive, thrifty, patient and pessimistic, relative to other Swedes (Hofstede et al., 2010).

3.4.3 Republic of India

India is the second largest country in the world with over 1.2 billion inhabitants. The country is also ethnically diverse and is home to many different languages and religions, where Hindi is the largest official language but also English is widespread (Kuiper, 2010). India's population is further growing rapidly, and the population is expected to surpass that of China in 2028 (BBC, 2017).

The study by Hofstede et al. (2010) shows that India is a country with high power distance (77) which implies that there exists a quite high power inequality in the society. This implies that the people of India prefer autocratic and centralized management to a higher degree than democratic, and that the wealth distribution is uneven, pointing towards that India should have a small middle class (Hofstede et al., 2010). However, according to Breene (2016), more than half of the Indian population, around 600 million people, now belong to the middle class whose growth is expected to accelerate. The individualism index indicates that India is a somewhat collectivistic society (48), which implies that group membership is quite important (Hofstede et al., 2010). The masculinity index shows that India has a fairly masculine culture (56), meaning that there is gender inequality, which indeed is confirmed by the Social Institutions and Gender Index (2017). The masculinity also indicates that there is a market for luxury and foreign goods, since masculine countries tend to prefer such goods to domestic according to Hofstede et al. (2010). India further has low uncertainty avoidance (40), which indicates that they are comfortable with acting in uncertain environments and without extensive rules (Hofstede et al., 2010). This also indicates that Indians are comfortable with buying used cars and repairing them by themselves instead of visiting automobile repair shops (Hofstede et al., 2010). The long term orientation index (51) points toward that Indians are somewhat more long term than short term oriented, and their low indulgence index (26) indicates that Indians are restrained and value thrift, and thus are less likely to spend money on leisure and pleasure than a culture which is indulgent (Hofstede et al., 2010).

Comparing the Indian and the Swedish cultures, the differences are most apparent when it comes to power distance, masculinity and indulgence, and to some extent individualism. In terms of uncertainty avoidance and long term orientation, the cultures are however quite similar. These differences will manifest themselves through that Swedes will perceive Indian behavior as autocratic, non-egalitarian, competitive, stressed, thrifty, pessimistic and to some extent interdependent (Hofstede et al., 2010).

3.4.4 The United States of America

The United States is the third largest country in the world and its population is largely built on immigration from other parts of the world, which has made the U.S. one of the most culturally diverse countries in the world (Live Science, 2017). The country has no official language but the most common, which is spoken by around 90 percent, is English. There are however more than 300 languages spoken in the country (Live Science, 2017).

The power distance index of the U.S. is according to Hofstede et al. (2010) somewhat low (40), meaning that the U.S. is a quite egalitarian country, at least comparing to China and India. The individualism index of the U.S. is 91, which is the highest of the three countries in this study, and which means that the society is highly individualistic (Hofstede et al., 2010). This implies that the Americans have quite weak bonds to the groups to which they belong and that they value independence (Hofstede et al., 2010). The masculinity index was found to be quite high (62), which means that Americans value monetary wealth and status and that they like to show it off (Hofstede et al., 2010). The uncertainty avoidance index of the U.S. is medium (46), meaning that they are quite confident with handling the unknown but still have a need for rules to some extent (Hofstede et al., 2010). It also implies that Americans are less prone to repair their cars by themselves than their Indian and Chinese counterparts. The long term orientation index is low (26), implying that Americans tend to prefer quick results and that they are not very thrifty (Hofstede et al., 2010). The indulgence index is quite high (68) which means that Americans are quite extroverted, optimistic and value leisure, and that they are willing to spend money on amusement (Hofstede et al., 2010).

The differences between the American and Swedish cultures are most apparent in masculinity and long term orientation, and to some extent in individualism and uncertainty avoidance. The power distance and indulgence indexes are however somewhat similar. These differences result in that Swedes perceive Americans as competitive, more keen on spending money and enjoying leisure, quite independent and to some extent stressed (Hofstede et al., 2010).

4. Empirical Findings

This chapter presents the findings of this study. First, the findings from interviews with potential customers and The Company premium market experts are presented, continuing with a description of existing customization in the automobile and other industries, stemming from secondary industry data. These empirical data are used to address the first research question, regarding possible demand for an extended customization offering, from both a customer and a supplier perspective (automobile and other actors). Finally, this chapter presents a description of the Company brand, where the data presented stem from our interview with a Company branding strategist. These data are used to address the second research question, assessing an extended customization offering from a branding perspective to explore whether the offering strengthens the Company brand.

4.1 Potential Customers

This chapter describes the results from the interview studies with five Chinese exchange students and three premium market experts, three Indian exchange students and two experts, as well as three American customers participating in the overseas delivery program and one expert. These interviews are conducted with the purpose of testing the hypotheses on potential customers of a possible customization offering. While the interviews with exchange students are based on convenience in that they are already situated in Sweden, they can also be seen to represent the potential markets, given that they belong to families with sufficient financial means to send their children to Universities and further to foreign exchange studies. The exchange students thus serve as representatives of their families, understanding their purchasing decisions, as well as future potential customers themselves. A table summarizing the results from the interviews with Chinese and Indian exchange students and American customers, along with an illustrating quote for each country and subject, is found in the Appendix.

4.1.1 China

This chapter presents the finding of the interviews regarding the Chinese market. First, the results from the student interviews are presented, followed by the results from the interviews with experts on the premium Chinese market, specifically.

4.1.1.1 Chinese Student Interviews

The student interviewees come from urban areas in different parts of China and all of their families own cars. Most of the families own one car while one owns two. The most commonly owned car is Volkswagen but also Suzuki, Hyundai and Chinese brands occur in some families. The cars are according to the interviewees chosen because of economic reasons and trying to maximize value for money, however one family had bought their car because of its comfortability. The main purpose of the cars is transportation for visiting relatives, grocery shopping, travelling, and in some cases travelling to work. None of the interviewees nor their families have ever customized anything on the cars besides the choices they were offered when buying the cars, such as a limited choice of exterior color, and most of the interviewees consider their families' cars to have an ordinary appearance. Indeed, it is important to the interviewees not to stand out from the crowd.

Regarding brands, the interviewees perceive European brands, most prominently German, to be superior to the Chinese which they believed to be of low quality. The parents of the interviewees are believed to prefer European and to some extent Japanese brands, but most important to both interviewees and families are that the brands are non-Chinese. Additionally, about half of the interviewees have specific brand preferences. Although some do not have strong brand preferences, the interviewees think that brand is more important than that the car perfectly fits their needs. That is, they make their selection among the models offered by their preferred brands rather than scanning the whole market for the optimal car, regardless of brand. Family and friends are seen as the main source of advice for when buying cars, but the interviewees do not feel that they are affected by others' opinions. Rather, they believe that they are making their own choices.

The German brands Audi, BMW and Mercedes-Benz are seen as expensive and as status symbols among the interviewees, and are mentioned to be known for good quality and performance in China. The Company is seen as a safer alternative to the German brands, but is also seen as overpriced by some interviewees. It is also mentioned that The Company have a disadvantage in consumer brand awareness as they are not as well known in China as their German counterparts, which according to some interviewees makes buyers in that market segment hesitant to buy The Company cars compared to the German brands. This is however suspected to change as The Company becomes better known in China, say some interviewees.

When asked about customization the interviewees are generally not interested, thinking that the options available today usually are enough. Some even think that there are already too many options. One interviewee however wants the ability to add safety additions and another wants the ability to add a sunroof. Further, the interest to participate actively in the design process of the car is low. Most interviewees however state that interior and exterior aesthetics and colors are important but they all agree that it is important not to stand out or attract attention. There is therefore no desire to own cars in extravagant or uncommon colors. Rather, about half of the interviewees think that performance is more important than design when choosing cars. Performance even seems more important than the brand of the car, as long as the brand is not Chinese.

4.1.1.2 Expert Interviews on Chinese Premium Customers

The experts on the Chinese premium market state that the typical premium customers are rich and well educated, usually leaders of companies and organizations. The customers seek a luxurious and exclusive feeling in their cars, and premium cars are marketed with an emphasis on the riding experience. Indeed, a comfortable and enjoyable riding experience is considered more important than driving experience since most of the customers use chauffeurs rather than driving themselves. The premium customers do appreciate some level of uniqueness to their cars, although it is important to not stand out too much from the crowd since they think it is important to be aligned with your social group and show group affiliation. The cars are usually purchased online, although customers can visit pop-up stores in select cities to view available cars.

The Chinese premium customers consider the brand of a car to be very important and see it as a means of portraying their success and status. Brand loyalty is however low, although they only change between brands from the same tier. That is, a customer that owns a car from a tier I brand (including Mercedes-Benz, BMW, Audi and more) will consider other tier I brands, or above when their economic power increases, but never brands from tier II (including The Company).

In China, customizable cars are rare and the car manufacturers offer complete cars packaged with top-level specifications. Generally, only the exterior color and some aesthetic interior features are selectable. As one expert explains it: customers in the premium segment get it all and customers in the regular segments get what they get. The experts do however believe that The Company should offer some customizable options, since they have noticed some demand from premium customers and since competitors have progressed further in terms of customizability. The reason for the demand of customizable options is believed to be the car owner's ability to show off their status, wealth and success, although there is no real demand for standing out from the crowd with extravagant exterior designs. If extended customization is to be offered, the experts think that the premium customers will like to be fairly involved in the process. That is, the customers will want to engage with The Company designers and take part in the design process, as this will make the customers feel more involved in the process and thus appreciate their car more.

Currently, the Chinese purchasing culture makes customers unwilling to wait for made-to-order products, including cars, which is more frequently occurring in Europe. Rather, the cars are usually brought home from the dealer as soon as possible after purchase. While the experts believe that an extended customization offering could work in China, they state that The Company thus first need to build their brand image in China in order to make the customers willing to wait for their cars, to enable offering more customizable features since customers generally are willing to wait for cars if they are considered premium enough. Finally, The Company need to prioritize what features should be customizable since every added option also adds variant costs which will raise the overall pricing of the cars.

4.1.2 India

This chapter presents the finding of the interviews regarding the Indian market, where the results from the student interviews are presented first, followed by the results from the interviews with experts on the premium Indian market, specifically.

4.1.2.1 Indian Student Interviews

The Indian interviewees come from urban areas and have experience of driving cars as well as an interest in the automobile industry. The students have come to study in Sweden to gain international experience and applied to Chalmers University of Technology because of its good reputation. All of their families own cars, in most cases more than one, that were chosen due to good value for money and low maintenance costs, while also being dependable. One family, which owns only one car, also owns motorcycles which are used when going into the city to avoid traffic. The vast majority of the families' cars do not belong to the premium segment - rather, hatchback models are common and the most commonly owned brand is Marutu-Suzuki. Except Marutu-Suzuki, Hyundai and BMW also occur among the families. The reason for Marutu-Suzuki's popularity is the broad and widespread service network along with economic reasons and the belief that Marutu-Suzuki cars are durable. The families' cars are mostly used purely for transport, with the exception of the BMW which one interviewee owns together with friends for the sole purpose of joy of driving. The cars are all of the more common colors and models and do not stand out from the crowd. Performance and economic aspects are prioritized above aesthetics.

The interviewees also note that Indians commonly use aftermarket auto shops in order to customize their cars, both for aesthetic and performance related customizations. For example, one of the interviewees' families has used such an auto shop to upgrade the engine of their car and another has upgraded the rims. The use of auto shops to alter exterior aesthetics has however made the unique exterior features quite mainstream. When asked about customizing their own cars in the future, the main focus is therefore on upgrading the performance of the car through changing engine parts or purchasing tuned engines. Beyond performance, the interviewees have little interest in customizing beyond what is usually offered by the car manufacturers. Some interviewees also mention that Indians in general tend to choose the cheapest options for the desired car model when assembling the cars through the car manufacturers, to instead customize their newly bought cars according to their taste at aftermarket car shops. The reason is that customization at aftermarket car shops is far more affordable than customizing through the car manufacturer. Additionally, the auto shops offer a wider range of customization options.

The interviewees seem to be brand loyal, but within different price ranges. They do however aspire to buy cars from a higher price segment in the future, specifically aiming for German brands with BMW as the most popular. Currently, such cars are however deemed as too expensive, hence Volkswagen and Hyundai are mentioned as possible brands that are more likely to fall within their price range. The interviewees' parents are however considered to be very brand loyal. When asked to what degree the interviewees' buying decisions are affected by their families, most say that they would take advice from their families but make the final decision on their own.

The interviewees do not see the benefit in buying customized cars in the future and would rather visit aftermarket auto shops as they are much cheaper than the car manufacturers. One interviewee also notes that they trust the car designers and that they would not want to “ruin” their design. Neither do they think that the Indian public would be interested in customization, as the general public are not yet used to owning cars and that too many choices, such as in higher degrees of customization or bespoke, thus would be overwhelming.

Regarding The Company, the interviewees find The Company’s brand status to be similar to the German brands, but that The Company cars are comparatively overpriced. Further, The Company cars are well known for their safety. One interviewee also mentions that The Company is rather known for buses in his home town and that their cars are rather unknown.

4.1.2.2 Expert Interviews on Indian Premium Customers

The typical Indian premium car customers are rich and well-travelled, often business owners or chief officers and not seldom well-known members of their societies. Due to low labor costs in India, the premium customers usually use chauffeurs to drive their cars, which is why they prioritize safety and back seat comfort since the back seat is where they spend most of their time, working or relaxing during long trips to and from their workplace. They thus search for comfortable seats and luxury gadgets such as beverage coolers in the back of their cars. Additionally, the well-known customers prioritize values such as environmental friendliness, since they then can portray an advantageous image in the media. The car thus has the role of a status symbol and a means of portraying image. The customers do however not want their car to stand out from the crowd. While they do appreciate an interior design that fits their specific needs, and thus is unique in a way, this uniqueness is not easily visible to others and is not for the purpose of showing off.

The customers are well aware of the available brands and consider them to be important. They are however not brand loyal, and many premium customers own several cars from all different brands.

Today, there are few customization options available in the premium segment. Cars are sold as complete packages with high standard specifications included in the price, with options usually limited to exterior color and interior material to some extent. The premium customers indeed generally want a complete car: many do not want to make choices when buying their car as they believe that the high prices should include that manufacturers design the car for them. Indian customers also do not have a culture of waiting for a car to be manufactured, but instead want it immediately, unless it is considered premium enough to be worth the wait. However, there are also premium customers who seem to demand a higher degree of customizability including the ability to add their initials and to further improve interior comfortability. The experts thus believe that an extended customization offering could be beneficial for The Company from a competitive perspective.

If customization is to be offered, the customers are believed to want some level of participation to make the best choices according to their needs. The experts however believe that customers would not want to put too much effort into researching different options, meaning the experience would have to be simplified, perhaps with the help of a designer. Finally, experts believe the customers would appreciate experiences such as the overseas delivery program offered to American customers.

4.1.3 The United States

This chapter presents the findings of the interviews regarding the American market. First, the results from the overseas delivery customers interviews are presented, followed by the results from the interview with the expert on the premium American market, specifically.

4.1.3.1 American Customer Interviews

The American customers participating in the questionnaires and interviews are all purchasers of The Company cars in an overseas delivery program. The customers bought their Company cars for varying reasons. Common characteristics are however that they are upgrading from previous cars - some are substituting their old cars while others are keeping them along with their newly bought cars. They all own several cars and usually every car has an individual purpose such as work, leisure or travel. When purchasing cars, the respondents state that they prioritize comfort, safety, dependability and design. The Company cars were chosen mainly due to their comfort and appealing design, especially interior. Other than The Company, the customers considered Ford, Mazda, Mitsubishi, Mini, Honda and BMW (different for all interviewees) prior to their purchase. To the American customers, the Company brand stands for safety, reliability and great design with attention to detail.

The customers did not experience any shortage of choices when building their car - one even states that there were too many choices. However, certain packages where choices are coupled together are not appreciated since the customers then have to pay for unwanted features, or refrain from adding a preferred feature if they do not want to pay for the whole package. As an example, one respondent brings up that since they wanted ventilated seats they also needed to add a seat massage function which they did not want. Another customer identified a color that they liked, but then realized it was only available on a different variant of the model they chose.

None of the respondents have ever customized or thought about customizing their car additional to the choices made available for their preferred model, neither through the car manufacturer nor though an independent custom shop. Generally, the customers are not interested in the idea of extended customization, since the options already made available for the base price are more than enough. Additionally, since there are already so many options (e.g. different exterior colors) they do not want to pay a higher price to get access to even more. One respondent would possibly be interested in choosing from an additional palette of colors, since they do not like the “boring” colors usually offered such as white or silver, but has not considered it before and does not know how much they would be willing to pay for such an addition. The customers are however certain that current prices are too high for them to consider extended customization today. Others state that they will not be interested since they associate bespoke or extended customization cars with extravagant, “showy” designs which they are not appealed by since they themselves prefer classical designs.

Rather than customization, the customers are very impressed by the overseas delivery program and the travel they have been offered. They consider it to be a great value adding feature to their car purchase and state that many of their acquaintances that have previously not considered The Company will do so now that they have heard about the program. The respondents believe that the overseas delivery program will be advantageous in establishing and maintaining good customer relations - more so than offering further options in the configuration of the car.

4.1.3.2 Expert Interview on American Premium Customers

The American premium customers are either very rich, or relatively rich with a great interest in cars which makes them willing to spend proportionally much on them. Among the American premium customers, the car is seen as a status symbol although the other functionalities of the car vary depending on what model it is. Usually, American premium customers own several cars all for different purposes. The expert claims that there are different kinds of premium customers with different priorities regarding cars, making it difficult to describe a stereotype for the entire American premium car market both in terms of personal traits and prioritized features. For example, some premium customers like a classical style while others want to stand out aesthetically, and there are varying motivations for driving (joy of driving, transportation etc.). However, the expert believes that premium customers all prioritize common traits such as exterior and interior color and performance.

The American premium customers generally find brands important, although some brands are more relevant than others depending on what purpose the specific car serves. Further, the premium customers are not very brand loyal, although they used to be, and today usually own many cars from all different brands.

The premium car customers in the U.S. are not necessarily interested in customization, other than that many want to break the packages of options usually made available by car manufacturers as to decrease variation costs. The expert claims proneness to customization is more of a personal trait, although they believe this trait is more commonly occurring among premium than general customers. For the premium customers that do demand customization, however, the ability to customize will trump the car brand which otherwise is seen as very important. Choice is seen as premium, and for these customization-prone customers the access to customization is the main priority. The expert is however unsure of whether all customers will want to actively engage in the design process: rather, they think that this willingness too is a personal trait. Generally, however, customers do not want to wait for their car to be produced which can pose a problem should The Company offer extended customization.

Concluding, the expert believes that the market for customization is currently small although the actual customers of that market have great demand for customization. The expert still believes that The Company should offer extended customization to be able to compete with their main competitors, who all offer customization to varying extents at a similar price point as The Company. As they explain it: if The Company prices like the German brands they also have to deliver like they do, and choices indicate a premium car. They are however unsure of what market value extended customization will have.

4.2 Customization of the Automobile Industry

Customization offerings are prevalent in the automobile industry, ranging from complete bespoke offerings to extended customization compared to the car manufacturers' base offerings. Additionally, there are third-party tuners that will customize cars according to their niche. This chapter explores the competitive landscape of customization within the automobile industry through presenting the offerings of some of the actors within each of the three categories, based on secondary data gathered by a Company business analyst.

4.2.1 Bespoke offerings

Bentley have a dedicated customization center located in Crewe, United Kingdom. One of their business areas are a bespoke offering which is called "Personal commissioning", featuring maximum customization completely according to the customer's taste, usually resulting in one-off editions. An example of such a car is the Bentayga Fly Fishing by Mulliner, a bespoke car with a trunk full of equipment specified for fly fishing, along with food storage and waterproof protection covers to fit a fly fishing enthusiast. Further, Bentley offer the "Coachbuilt Cars" which feature an even increased level of bespoke and are usually limousines and one-off editions. Customization is here extended beyond just interior and exterior, to also altering the car body structure and design which comes with far higher costs in engineering and quality testing.

"Mulliner Features" are additional options to the base models of Bentley, hand-built by Bentley's design team Mulliner. Features include special lighting, lambswool rugs instead of standard, special wheels, embroidered Bentley emblems as well as more complex featured such as a "picnic hamper" filled with all the customer needs for a picnic, and a between-seats cooler and cabinet for keeping drinks cool in the car. Bentley have a dedicated workshop for their custom-made additions, where for example wheels and upholstery is stitched.

Finally, "Mulliner Limited Editions" are limited unit product lines, usually 15-50 cars, different from the traditional cars but where the content is created by the Mulliner team rather than the customer. These product lines do not offer customization to the customers, rather it is the Mulliner team that personalizes the car according to a limited intended customer group. Examples include Mulsanne Majestic which is a special, 15-unit version of their standard Mulsanne model, but with a rubino red color theme inspired by royalty. The Mulliner features as options to base cars can also be incorporated as standard features in Mulliner Limited Editions, as in the case with Mulsanne Majestic; a bottle cooler and frosted glasses.

Also British car manufacturer Rolls-Royce have a dedicated bespoke center, "The Atelier", at their headquarters where customers are welcomed to customize their car together with a designer. As an example, more than 44,000 exterior colors are available and if the customer is not satisfied with that selection, Rolls-Royce will develop a new color that will also be held exclusive to that customer if they wish. Customers can customize anything from interior upholstery material, texture, thread and stitching type, as well as putting their signature or another mark on the exterior and as embroidery on the seats. Rolls-Royce have just like Bentley designed special feature additions such as a picnic hamper which customers can add to their cars. The Atelier further has a light simulator so that customers can envision how the car will look in different locations with different light intensities and temperatures, meaning the customer can see exactly how their car will appear in their city of residence.

Like Bentley, Rolls-Royce also offer limited edition cars with associated special features. Examples include the Phantom Zenith limited edition, with additions such as a Champagne cooler with room for two standard bottles and eight glasses, coupled with a padded rear-tailgate so that the owners can sit down and enjoy some refreshments upon reaching their destination.

4.2.2 Extended Customization

German car manufacturer Porsche do not offer complete bespoke in the Bentley and Rolls-Royce manner, but rather extended customization as compared to the base models. Porsche offer a range of customization options for selected models including the exterior and interior designs, where the customer combines options from predefined palette of colors and seam patterns, which are then assembled by hand in Porsche's dedicated workshop. In this way, customers are given the limited opportunity to incorporate their own personal taste in their car with the guidance from a Porsche designer, at any of their consultation offices in Zuffenhausen, Atlanta, Los Angeles, Dubai or Shanghai. At these locations, there are also materials and vehicle exhibitions so that customers more easily can envision the final design of their car. Although Porsche currently do not provide a complete bespoke offering, their dedicated workshop for hand-made details of limited editions shows they possess a capacity to potentially offer such in the future.

Another brand offering extended customization is Audi. The Audi Exclusive offering is available for selected models, where customers can choose from an extended amount of customization options, compared to the base offering, including additional exterior colors, upholstery, stitching colors, veneers and more. As an example, the extended customization features around 80 exterior colors as compared to the around 10 colors that are included in the base model offering. Audi Exclusive is owned by Audi Sports GmbH, a subsidiary to Audi AG, but it is unclear whether they have a dedicated workshop like for example Porsche. They may even outsource the hand-made details such as stitching. All in all, it is unknown how Audi handles the production of their customized Exclusive cars, other than that they are handled by a subsidiary rather than Audi AG itself.

Also BMW offer extended customization on selected models, including offering the customer to choose from an extended palette of exterior colors that are not made available to customers of the base model. Interior and exterior color and materials, and more, can be selected from a predefined palette but there are also examples of BMW having developed certain special designed features for key clients. All in all, they resemble Audi in terms of degree of customization of their current offerings, however previous bespoke work in limited volumes shows they have the capacity of moving further towards bespoke.

Finally, Mercedes-Benz has a standalone customization division, offering their customers extended customization in a similar fashion to Audi and BMW. The options made available are from the predefined palette, and include options on the exterior color, including for example contrasting roof and wheel paint, colored seat belts, customized roof liner and interior materials.

4.2.3 Third-party niche tuners

There are several third-party car tuners who offer customization on popular cars brands Brabus is one of them, working mainly with tuning Mercedes-Benz and Smart cars. While car manufacturers limit customization to mainly aesthetic features, Brabus are focusing on customizing tech applications, infotainment and multimedia, thus adding another layer of customization not made available by the car manufacturers themselves.

Another actor is Heico, a German tuning company specialized on modifying Volvo vehicles. Heico deal with engine tuning and performance-raising additions, for example “sport springs” to give the car increased performance in sharp turns. Other options made available include specialized exterior colors, interior upholstery material, wheels, floor mats and rear lettering.

4.3 Customization in other industries

Customization is trending in several markets besides the automobile. According to a report by Deloitte (2015), technology advancements have made customized products and services more affordable and accessible and the increased affluence of societies will further increase the demand for customized items. The survey carried out by Deloitte (2015), which investigates demand for customized products and services, finds consumers are interested in purchasing customized products particularly in entertainment and leisure categories, including holidays, hotels and flights, followed by furniture and homeware, especially among consumers aged 55 and over. Clothing and footwear are also found to be popular items for customization, especially for consumers from 16 to 39 years old. Averaging the different product categories, around 36 percent of customers are interested in customizing their purchase. Noteworthy, however, is that only around one in six consumers have actually purchased a customized item, posing a challenge for suppliers of customizable products and services in turning customer interest into actual purchases and profit (Deloitte, 2015). There is however potential for premium pricing: a majority are willing to pay more for their customized products, especially for fashion products such as clothing, footwear, accessories and jewelry or products among the more expensive categories, such as furniture and homeware. The Deloitte (2015) survey further finds that 48 percent of consumers are willing to wait longer for the delivery of a customized item.

Based on the findings, Deloitte (2015) divide customization into three categories; mass personalization, mass customization, and bespoke. Mass personalization includes products and services that are mass produced but that can be modified by the supplier, according to the data that they have about the customer. An example is the personalized recommendations through pop-ups at Amazon, based on previous purchases. Mass customization, on the other hand, are mass-produced products where the consumer is offered options to customize the product or service themselves, e.g. build-your-own computers from Dell. Finally, Deloitte (2015) define bespoke products as unique and completely adapted to the customer, who is involved in the process from start to finish, as in the case of tailor-made suits. That is, mass personalization implies little or no customization, while mass customization has an extended customization level and bespoke equals maximum customization.

The results from the survey further show that customers' interest in being active in the customization process differs among product categories: an active role in the customization process is preferred in cases of expensive items, such as holidays or furniture and homeware, and in clothing, footwear, accessories and jewelry where customers want to incorporate their own personal taste. In these product categories, a higher degree of customization is also preferred. In flights, hotels and electrical goods, the customers want to be active in the process but will settle for a lower degree of customization, such as choosing between a set of predefined options. Finally, in commodity products such as soft or alcoholic drinks, customers want to take on a passive role while still enjoying moderate adaptation according to their preferences, closer to the mass personalization end of the spectrum.

The consumers in the survey are found to have a demand for customization because they find them suitable for gifts (reported by 50 percent of participants), that they demand something unique (41 percent) and that standard products do not offer them what they want (34 percent) (Deloitte, 2015). Further, 32 percent find the process of designing something on your own to be fun and 28 percent want to buy something that expresses their personality. 59 percent of respondents state that they do not already have too many options when shopping without being offered customization, and 51 percent do not trust companies to design products or services that they will like without the need to customize them (Deloitte, 2015), implying there should be room for increasing the amount of customizable options of products in general.

Further, Deloitte (2015) state that companies who offer customization have a higher chance of offering the customer something they want while also improving the purchasing experience, possibly enabling charging higher prices and leading to higher conversion rates from customer interest to actual purchase. Bespoke and customizable products have in fact been existing for a long time within automobile, niche and luxury industries, however today additional industries are increasingly starting to provide customization at more affordable prices. In the following subchapters, further examples of customization within luxury yachts, luxury watches and retail will be presented.

4.3.1 Luxury Yachts

Luxury Yacht producers offer a range of different bespoke options, ranging from offerings similar to the luxury car manufacturers, where usually the hull and machinery is set while several other areas of the boat can be customized, to complete "carte blanche" solutions where the entire design is made from scratch (Rowland, 2017). Traditional bespoke yachts are offered by, for example, German Blohm+Voss and American Christensen Shipyards who enable customers to design their own furnishing and upholstery, as well as to add features to the yachts including bars, hot tubs, pools and more (Rowland, 2017; G-Yachts, 2017; Christensen Shipyards, 2017). The carte blanche options offer one-off products that are completely unique, starting from a blank sheet where the customer can design their own custom hull, offered by e.g. Dutch Feadship (Feadship, 2017). Italian Fincantieri Yachts specialize in yachts over 70 meters and have no upper limit in terms of size or volume (Rowland, 2017), offering both carte blanche yachts and bespoke yachts built on pre-engineered platforms to enable shorter lead times (Fincantieri Yachts, 2017). Lead times of customized yachts indeed tend to be long - Feadship's carte blanche yachts take around 38 months from start to finish (Feadship, 2017), and Blohm+Voss' bespoke yachts still take 30 months even though they are built on a pre-engineered platform (G-Yachts, 2017). Sizes of customizable luxury yachts range from smaller yachts, around 30 meters as the specialty of brands such as Heesen Yachts, up to larger boats with no actual upper limit in terms of size or volume, offered by for example Fincantieri Yachts (Rowland, 2017).

4.3.2 Luxury Watches

Having offered customizable jewelry, especially bridal, for many years, luxury watch brands are now adding this possibility also to their watches. Bulgari is one example of a luxury watch brand offering customization, not only available for their most high-end watches, but also the more affordable product lines where a customer pays a 10 % markup for the customization (Day and Night Magazine, 2017). For example, the relatively affordable Bulgari watch Serpenti offers the ability to choose the case and the color of the dial, gemstone setting and the strap, resulting in 312 possible combinations (Bulgari, 2017b). The cheapest variation starts at $3,850 (Italialiving, 2017) while another combination amounts to $9,700 (Bulgari, 2017b), and the design can be carried out by the customers themselves in a dedicated customization configurator. Bulgari also offer a wide watch strap assortment and customizable watch straps where the customer can choose from a variety of fabrics and select stitching type and color, as well as the border color (Bulgari, 2017a).

Other luxury watch brands offering limited customization include Cartier who offer 14 different strap colors (Cartier, 2017), Rolex offering different combinations of strap, case and dial on select watches (Rolex, 2017), and Jaeger-LeCoultre who offer almost any strap material, color, stitching option and finishing, but no customization other than engraving when it comes to the body (Jaeger-LeCoultre, 2017). Some established luxury watch brands however do not offer any customization at all. For example, Patek Philippe insist that all of their one-off or limited editions are creations by themselves and not by customers (Koltrowitz, 2014). While some established brands are starting to offer customization to an increasing degree, most of them still have the final say over the customer on the final design (Koltrowitz, 2014). Indeed, according to some analysts, mass customization where customers are offered a set of predefined options has great potential, but complete bespoke options will remain a niche since the established brands do not want to lose control over the designs (Koltrowitz, 2014). An example of such a niche player is Italian Buccellati, founded in Milan in 1919, who enable their customers to customize everything - the only requirement is that every watch is marked "Buccellati" (Koltrowitz, 2014).

Alongside the luxury watch brands already offering customization of watches themselves, however, is the Bamford Watch Department who customize luxury watches from several iconic brands including Bulgari, Tag Heuer and Zenith (Bamford Watch Department, 2017). Bamford offer more customization options than the original brands, enabling customization of everything from the strap and dial to details such as hands and batons, and they also customize models on which the original brands do not enable customization: for example, the Serpenti watch is available in close to 48,000 combinations and the customer can add their initials to the dial (Bamford Watch Department, 2017). Bamford's business is however somewhat controversial among watch collectors. Some love the ability of applying their own style onto a watch while others are against the idea of changing the design of a good watch (Pulvirent, 2017). Since Bamford work independently from the major watch brands, in most cases the warranties of watches are voided as soon as Bamford starts their customization work (Pulvirent, 2017). However, in June 2017 Zenith appointed Bamford as an officially authorized customizer, meaning Zenith will consider a Bamford customized Zenith watch as an authentic Zenith and honor all warranties (Pulvirent, 2017). Perhaps Zenith will be the starting point of watch brands validating independent customization actors, and as more brands follow, customers will have extended customization options on their watches with more security, as they do not have to give up their warranty on their luxury watches.

4.3.3 Retail

A new trend in retail experience is offering in-store production of bespoke or customized products while customers wait. For example, Nike launched a New York invite-only program in September 2017 called the Nike Maker's experience, where customers can customize their own shoes in less than one hour, either choosing from different designs or using a digital design tool (Dutta, 2017). Using the Nike online customization tool, open to everyone, by comparison requires six to eight weeks from design to delivery (Dutta, 2017). Further, Adidas opened a pop-up store in Berlin from December 2016 to February 2017, the "Knit for You" store for designing true bespoke sweaters (Dutta, 2017). Using body-scan technology and trying out different patterns and designs in a digital tool before settling for their design of choice, customers were able to customize a sweater to their specific measurements and aesthetic taste before it is produced in-store (Adidas, 2017). Another brand for business-wear, Ministry of Supply, even uses 3D knitting in their Boston store to create customized, completely seamless blazers during customers' visits, reducing fabric waste in the process (Dutta, 2017; Ministry of Supply, 2017). From design to finish, the process takes 90 minutes and costs $345 (Dutta, 2017).

Not only fashion retailers are opting for customization: the St. Ives Mixing Bar offered customized, in-store production of skincare products during the summer of 2017 in New York (Dutta, 2017), where customers could choose their desired level of exfoliation, product richness and add additional ingredients (TimeOut New York, 2017). Another example is Function of Beauty, who analyze the customer's hair type and then create a custom shampoo and conditioner for $36 (Dutta, 2017). Further, Interflora enable customers to drag and drop more than 70 different flowers and foliages and Argos, a retailing brand, is running a 3D printing pilot project for customization of jewelry (Deloitte, 2015). Even consumables businesses are starting to offer customization to different degrees, for example customized packaging in pasta and soft drinks (Deloitte, 2015).

4.4 The Company Brand

Currently, The Company is a rather premium and somewhat progressive brand. Going forward, The Company however wants to reposition their brand to portray an even more progressive and premium brand image. This shift is visualized in figure 4.1 which positions the current and future preferred brand image in a graph. The y axis represents social status, comprising several different metrics including economic power, the customer perceived ability to affect their life and society and the customer's self-image in relation to their surroundings. The social status dimension thus captures how premium the brand is considered, something that The Company seeks to increase. The x axis, in turn, represents value orientation which contains the level of progressiveness, ranging from traditionalism to subjectivism. The value orientation dimension can also be interpreted as that customers on the left end of the spectrum prefer things, while people on the right end appreciate experiences. That is, people in the upper-left area of the graph will buy expensive things to show off, while people in the upper-left area indulge in exclusive experiences that they will carry with them for life. One of the reasons The Company wants to increase the brand's progressive image is because the surrounding world is becoming increasingly progressive. Therefore, it is vital to keep moving to the right end of the value orientation maintain a given position. Furthermore, the market is believed to be saturated in the center of the value orientation axis, meaning moving rightward will place The Company in a market segment with less fierce competition. Finally, the reason for the increased social status of the brand is the ability to charge premium prices in the future, which will improve business.

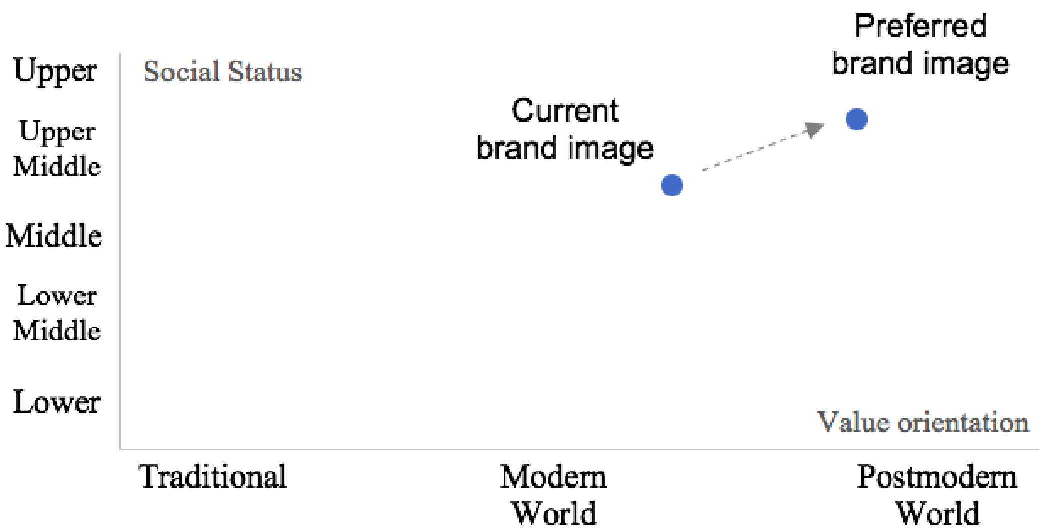


Figure 4.1. A visualization of The Company's current and preferred brand image along the dimensions of social status and value orientation.

If The Company is to become a progressive, premium brand, they need to offer products and services that attract customers in the upper-left corner in figure 4.1. For this purpose, The Company have identified the features and values which customers in that area seek, and from those chosen a few that they will prioritize. Such prioritized features and values include an intelligent and modern brand, intelligent and intuitive technology, a less complicated car experience, attractive design, high degree of refinement, and a brand that thinks about the customer first. Thus, these values among others are the focus of The Company's brand strategy. When repositioning their brand, The Company further need to take in consideration the brand image of their sub-brand, which focuses on co-creation with an emphasis on performance. It is therefore important that any repositioning of the Company brand does not cannibalize on the brand image of the sub-brand.

5. Analysis

In this chapter the findings of this study, presented in chapter 4. Empirical Findings, are analyzed with regard to the theories presented in chapter 3. Literature. The first research question regarding demand for extended customization is addressed from two perspectives: first, the customer perspective concerns actual demand identified through interviews in this study. The customer perspective analyzes the results from 4.1 Potential Customers against theory on luxury goods by Tynan et al. (2010), the customer perceived value tool by Merle et al. (2010), and the dimensions of national cultures by Hofstede et al. (2010). Second, the supplier perspective addresses the first research question through exploring existing customization offerings both in the automobile and other markets, as indicators of demand in other customer groups than the ones obtainable for interviewing in this research. That is, the prevalence of customization offerings in the automobile and other markets are seen as indicators of existing demand, independently of what is found in the customer perspective. The supplier perspective analyzes the findings of 4.2 Customization of the Automobile Industry and 4.3 Customization in Other Industries against theory on luxury goods by Tynan et al. (2010) and the customer perceived value tool by Merle et al. (2010). Finally, this chapter addresses the second research question, regarding brand fit, from the branding perspective where the findings of 4.4 The Company Brand are analyzed against the theories of branding strategies by Aaker (2012), Aaker and Biel (2013), Kapferer (2012) and Vincent (2012), among others.

5.1 The customer perspective

The interviews with potential Chinese, Indian and American potential customers show that in general, the aesthetic and functional aspects of the car are prioritized, while active participation in the assembly or design of the car is of less interest. The potential customers generally prefer classical designs over a car that stands out, and see little value in being offered additional choices over the ones that are already offered by most car manufacturers. In fact, the interviewees note that the amount of choices are rather too many than too few, and some even state that they do not want to alter the car due to the risk of “ruining” the designer’s work. That is, there is little identified demand for extended customization among the general customers. Applying Merle et al.’s (2010) customer perceived value tool (CPVT), the customer preferences described translate into a prioritization of the utility value. The remaining two product values, uniqueness and self-expressiveness, seem to be less appreciated judging from the lack of interest of standing out from others or gaining access to additional choices to better display one’s personality. The hedonic value, achieved in the joy of the co-creation process, also seems to have a low priority, as illustrated by the fact that the customers do not want to devote time or effort to engaging actively in the process of assembling even standard edition cars with limited options – for example, the Americans customers believe that there are too many choices already, demanding effort for them to make an educated choice. While the Americans do appreciate the overseas delivery program, which can be seen as a joy of experience value, it is important to note that this experience comes only after the car is assembled and produced, that is, completely separate from any co-creation process. Finally, the creative achievement value is deemed to have limited importance as a result of the lack of interest in customizing a car at all. Without customization, there is limited room for pride of authorship.

The prioritization of utility over other customer values does not align with Tynan et al.'s (2010) statement on that utilitarian value merely is a hygiene factor for luxury customers, and that the real differentiating value is gained in the symbolic/expressive and experimental/hedonic values, corresponding the four non-prioritized Merle et al. (2010) values. A reason for this contradiction may be that the identified interviewees, as explained, do not actually belong to the luxury segment. Judging from the cars owned by the Chinese and Indian exchange students, bought from mainly non-premium brands, mainly used for transport and chosen for economic reasons, it appears they are in fact not a part of the luxury segment. The cars of the American customers are deemed to be closer to a luxury segment, although they can still be deemed to belong to an upper-medium class segment which could explain why the utility value holds the highest priority.

If the reason for that the empirical evidence from the student interviews do not align with Tynan et al.'s (2010) theory is that those interviewees do not belong to the luxury segment, then such inconsistency should not be found in the data on premium customers gathered by industry experts. The experts on China and India all claim that high comfort, safety and an enjoyable riding experience are top priorities for premium customers. Both comfort and safety are utility values, and while riding experience is an experience, it is not connected to the co-creation process and can thus not be seen as an experimental/hedonic value. Rather, riding experience is prioritized to make a necessary process, travelling to work, more enjoyable and should thus be interpreted as a utility value, implying that also premium customers prioritize utility above all. The American premium customers' priorities are less well known, although it is believed that most of the customers do prioritize features such as exterior and interior design, performance and more. That is, also the American premium customers are considered to prioritize mainly utility values. Thus, it would seem as Tynan et al.'s (2010) theory on prioritized values of luxury goods is supported neither the by the premium customers.

Further, there is little demand for extended customization overall also among the premium customers, demonstrated by the fact that Chinese and Indians generally prefer a "complete" car where the designer is expected to make the designing decisions. The experts do however note that both Chinese and Indian customers have expressed some demand for an extended level of customization, stemming from the wish to display success and wealth, and that American premium customers have a more positive attitude towards customization than general customers. Indeed, already today the car is considered a status symbol and a means of portraying an image in all three premium markets. That is, the premium customers do seem to value symbolic/expressive (or Merle et al.'s (2010) uniqueness and self-expressiveness) values to some extent. Further, the experts believe that an extended customization offering could succeed in the future, although more work has to be done before it can be implemented. If it is offered, at least the Chinese and Indian customers are believed to want to engage in the process to some extent to further enhance their appreciation of their car, which can be interpreted as pride of authorship. Hence, the premium customers are believed to somewhat value also the experimental/hedonic (or Merle et al.'s (2010) hedonic and creative achievement) values. However, these are mainly speculations from the experts' side: the experts still withhold that most Chinese and Indian premium customers want complete cars as they are offered today, and that the American market for customization of premium cars is still small. The main premium customer prioritized values of today are thus deemed to be utility, and to some extent self-expressiveness values due to the customers' wish of displaying status. Further, as the experts note, the unwillingness of all three markets to wait for cars to be produced does not allow for cars to require lead times from order to delivery, practically making the success of an extended customization offering impossible with The Company's current brand position. If The Company can portray a premium enough brand image to make customers wait, extended customization could be successful since both Chinese and Indian experts note that a premium brand warrants longer lead times, but it is unclear how premium the brand image needs to be.

Although the general messages regarding general customer preferences and the idea of extended customization are similar among the countries, there are still some nuances which could be explained by cultural differences. For example, China has a low individualism index, making them interdependent and collectivistic, while India has a medium individualism index which makes them more independent than China. Since collectivistic societies are characterized by stronger group memberships and higher loyalty to groups, the difference in individualism between China and India could explain why the Chinese to a greater extent want to avoid their car from standing out from others. Meanwhile, the Indians frequently visit auto shops where both the performance and aesthetic features can be altered. However, although the U.S. individualism index is the highest of the three countries', the American customers also express that they prefer classical designs rather that standing out. This difference is thus inconsistent with Hofstede et al.'s (2010) high U.S. individualism index.

Further, China and India both have high power distance indexes. This indicates an uneven distribution of wealth with a minority of extremely rich people, which can explain why the lifestyles and attitudes of our exchange student interviewees, with their non-premium cars, do not correspond the expected lifestyles and attitudes of the premium segment. As a comparison, the U.S. power distance index is lower, which can explain why the American customers to a higher degree resemble the expected behavior of a premium customer, illustrated by for example that they appreciate the Tynan et al. (2010) symbolic/expressive value gained from adding features to the car to make it more personal. Furthermore, since the U.S. spends the most money on luxury goods of the three countries, while still maintaining a low power distance, the U.S. market should contain a larger group of comparatively wealthy people - as opposed to a mere minority in China and India. Finally, the American interviewees belong to a more premium segment than the exchange students since they have a greater economic power, which could also explain a part of this difference. However, the experimental/hedonic value in the customization process is still not deemed to be prioritized as the American customers do not want to make too many choices, meaning they still have differences to the expected premium customer behavior.

All three countries have high masculinity indexes, implying that they should prioritize purchasing luxury goods and thus present the luxury customer behaviors identified by Tynan et al. (2010), that is, prioritizing symbolic/expressive and experimental/hedonic values. As shown in the interviews, this is not the case in any of the customer groups in our sample. While both the Chinese and Indian interviewees express an aspiration to upgrade their cars in the future, i.e. traits of high masculinity societies, they also both have low indulgence indexes which imply that they are restrained and do not prioritize fun experiences. The low indulgence indexes could thus explain why they despite of their aspiration for luxury do not present luxury behaviors, including a prioritization of co-creation process related values (that is, the Tynan et al. (2010) experimental/hedonic value, corresponding to Merle et al.'s (2010) hedonic and creative achievement values). The U.S. indulgence index is however somewhat high, implying that Americans value fun experiences. This seems inconsistent with the fact that they do not want to take on an active role in the customization process and do not appreciate making too many choices. The Americans do however appreciate the overseas delivery program, which is in fact a hedonic value although it is separate from the co-creation process, as opposed to a part of the co-creation process in Tynan et al.'s (2010) theory. That is, the American customers do seem to appreciate fun experiences, aligning with Hofstede et al. (2010) indulgence index, although they do not appreciate them in a co-creation setting, thus contradicting Tynan et al. (2010).

5.2 The supplier perspective

The secondary industry data show that customization offerings of varying degrees are prevalent and increasing in the automobile as well as other industries, including among The Company's main competitors. This should indicate that also The Company should be able to implement a customization offering of some degree. The different actors, with their different degrees of customization offered, however vary in terms of the customer values they deliver.

First, the complete bespoke car manufacturers, such as Bentley and Rolls Royce, seemingly value and offer all of the values presented by Merle et al. (2010) to a great extent. Meanwhile, the automobile companies offering extended customization rather focus on the utility, uniqueness and self-expressiveness. This aligns with Tynan et al.'s (2010) reasoning that utility is a hygiene factor for luxury products, as all the companies seem to offer high utility. The complete bespoke manufacturers offer tailor-made cars, which have a degree of customization superior to the extended customization and third party tuning offerings. Every car is more or less one-off editions, as every customer has the freedom to customize their car according to their taste and needs. Examples of such freedom are the large amount of different exterior colors to choose from, and that even further, personal colors are made available upon request. Furthermore, the bespoke manufacturers have bespoke centers where customers can view available materials and design their cars together with professional designers, catering to the customers' needs and making the purchasing process a pleasant experience. The ability to tailor the car to fit every individual customer's needs gives the car a high utility value, translated into Merle et al.'s (2010) customer perceived value tool, as well as the possibility to obtain high uniqueness and self-expressiveness values. Further, the opportunity to partake in the design process at the bespoke centers satisfies the hedonic value as well as the value of creative achievement. Thus, all of the Merle et al. (2010) values are indeed catered to by bespoke offerings.

In contrast to the complete bespoke offerings, the extended customization car manufacturers focus mainly on the utility, uniqueness and self-expressiveness values. Also in the extended customization offerings, the customers can choose from a variety of different options and thus customize the car to their specific needs. The resulting wide range of product combinations enables both uniqueness and self-expressiveness, even though these values, and to some extent also utility, can be deemed to be somewhat lower than in bespoke offerings due to more limited customer freedom of design. The hedonic and creative achievement values are however less emphasized, as illustrated by the fact that extended customization car manufacturers do not offer experience-elevating customization centers in the same way as bespoke actors. Instead, the customer is left to make most of the choices on their own, in for example an online configurator, with limited designer assistance.

Finally, the third party tuners are deemed to offer similar values as the extended customization offerings, although they are focusing more on performance or tech-oriented customizations. These actors can thus be seen to offer mainly utility, uniqueness and self-expressiveness values. Thus, the main differentiators between bespoke and extended customization or third party actors are the hedonic and creative achievement values, corresponding the experimental/hedonic value in the theory of Tynan et al. (2010). Further, both extended customization and bespoke offerings entail a high level of utility along with high, but varying uniqueness and self-expressiveness values (Tynan et al.'s (2010) symbolic/expressive value). Indeed, it seems as both the symbolic/expressive and experimental/hedonic values act as differentiators, aligning with the Tynan et al. (2010) theory.

In the other industries where extended customization is offered, the degree of customization and the associated values vary greatly. In the luxury bespoke yachts industry, for instance, the utility, uniqueness and self-expressiveness values are high, while the companies are also offering high hedonic and creative achievement values, illustrated through that some companies offer yachts designed from a blank page. These yachts are however very expensive, take years to design and build and therefore only cater to customers of extreme wealth. The kind of customer purchasing bespoke luxury yachts thus likely belongs to a different customer segment than The Company's and may thus not be suitable for The Company's customization offering. Hence, this industry is not necessarily a suitable benchmark for The Company.

The customers who buy customized luxury watches are likely more suitable customers to The Company's customization service, as the watches are more reasonable in price. Customization in the watch industry is however more limited than in the luxury yachts industry, which at least partly can be explained by conservatism in the luxury watch industry. The industry overall can be deemed to focus, beyond utility, on the customization values of uniqueness and self-expressiveness rather than the hedonic and creative achievement values, with the exception of Buccellati who offer complete customization and therefore the value of creative achievement as well. Also Bamford Watch Department, who offer customization on watches manufactured by established watchmakers, similarly to the third party tuners of the automobile industry, grant the customers creative achievement value as they are allowed to contribute to the design. The hedonic values can however be seen as the least prioritized in the watch customization industry, as many of the companies who do offer customization only involve the customer in the design process to a limited extent.

In contrast, the hedonic and creative achievement values are of the highest priority in the customization of retail. This industry also offers varying degrees of customization, from extended customization to complete bespoke. As several companies enable customers to design their own clothing and shoes in special stores, giving the customers the chance to participate actively in the creation process of the goods, both hedonic and creative achievement values are offered. These offerings also have high utility value as the goods are tailored to both the taste and measurements of the specific customer. What distinguishes these offerings from the other industries' is that the goods often are produced with the customers still in-store, meaning that customers can observe the realization of their designs from start to finish. This possibility should further enhance the creative achievement and hedonic value of the offering. The self-expressiveness and uniqueness values are also quite high, comparable to the extended customization in the automobile industry, since the customers to a certain degree are free to design as they wish. Other customizable retail offerings, such as Interflora's online drag-and-drop bouquets, however rather resemble the luxury watch industry in terms of customer involvement. Indeed, the retail industry is less homogenous than both the industry of luxury yachts and of luxury watches. Noteworthy is also that the prices of customized goods in the retail market generally are significantly lower than those of customized watches, which in turn are significantly lower than the prices of bespoke luxury yachts. This implies that many customers of the customized retail, even though they appreciate the customizability, may not necessarily have the resources to buy customized cars.

From the supplier perspective, it can be argued that the primary focus to stay competitive in the market, since The Company's main competitors are found among the companies offering extended customization, should be on the values of uniqueness and self-expressiveness. Meanwhile, The Company need to maintain a high enough level of utility, which Tynan et al. (2010) state is an important factor even though it does not enable differentiation from competitors. This is further confirmed by the luxury watch industry, whose customer segment should resemble that of The Company better than those of the luxury yacht and retail industry. Indeed, the luxury watch industry also prioritizes uniqueness and self-expressiveness over creative achievement and hedonic values. This does not mean that hedonic and creative achievement values should be ignored, however they are seen as less important to the customers The Company are expected to serve. Both of these values could still serve as further differentiators from competitors, as in the case of Porsche who offer a somewhat higher creative achievement through their consultation centers. To conclude, the prevalence of extended customization in the luxury and premium markets of both the automobile and other industries indicate that The Company could succeed with offering a similar service. However, they have to be aware of which customization values they offer, depending on what customer they wish to serve.

5.3 The branding perspective

The Company's brand department describes an intended repositioning to portray a brand image that is more premium and more progressive. That is, the results from the interview with the brand strategist defines both The Company's current brand image (premium, somewhat progressive) and their new brand identity (very premium, very progressive) which they aim to turn into a new brand image. For The Company' new brand identity to actually translate into a future, repositioned brand image, it is important that the customer experience of The Company's products and brand match the presented brand promise, or brand identity, as noted by Vincent (2012). Indeed, the brand strategist notes that The Company need to present products that attract the upper-right corner customers of the social status-progressiveness graph, presented in figure 4.1, if they are to move towards that brand position. The features and values identified as preferred by the upper-right customers (an intelligent and modern brand, intelligent and intuitive technology, a less complicated car experience, attractive design, high degree of refinement, a brand that thinks about the customer first, and more) are however not deemed to be catered to by an extended customization offering. While the chance of obtaining a design that is attractive to each individual customer can be argued to increase if the customer is allowed to alter the design as in the case with extended customization, the choices and thus the ability to alter the final design are still limited in such an offering. Moreover, it can be argued that such an offering further complicates the car experience, that is, the opposite of what the preferred customers want. Should The Company put emphasis on the hedonic values of the designing process itself, the brand could however be strengthened along the progressiveness dimension since progressive customers are found to appreciate experiences rather than things. This is however not something that is listed among the features and values that The Company will prioritize in their brand repositioning journey. Consequently, there is little evidence that an extended customization offering would in fact strengthen the brand along the dimensions prioritized by the brand department; social status and value orientation.

If the brand is not strengthened, then could it in fact be damaged by offering extended customization? Kapferer (2012) notes that if a brand consists of several sub-brands, they need to share the same core identity to avoid the brand being perceived as incoherent. The question then arises whether extended customization can be seen to share a core identity with the new brand identity of increased social status and progressiveness. The results of the interview with the brand strategist yielded insufficient data to prove that the identities of extended customization and increased social status and progressiveness will be perceived as incoherent. However, this matter should be further researched before any extended customization offering is implemented, to avoid damaging the brand image.

6. Conclusion

Given that the interviews with neither potential customers representing the general markets nor with The Company’s experts on the premium markets display demand for customizing cars - although interest is believed to be somewhat higher among premium customers - the customer perspective does not provide support for the implementation of an extended customization offering. From the supplier perspective, there is however some support for such an offering both from the competitor side, as many competitors offer varying degrees of customization or bespoke, and from other industries where customization is prevalent in a wide range of industries, including luxury yachts, luxury watches and retail. The fact that there is a growing trend among suppliers across industries of offering customization could indicate that there is a demand for customization in general. Although the available industry data have proved prevalence of customization across industries, they have however not been sufficient to determine the actual commercial success rates of extended customization or bespoke offerings in these industries, diminishing the supplier perspective support for an extended customization offering. That is, the combined customer and supplier perspective yields little support for a Company implementation of an extended customization offering.

The values prioritized by customers in this study are found to be mainly utility, but also to some extent uniqueness and self-expressiveness (corresponding to symbolic/expressive) values. However, these results have limited relevance since the answers come from customers that do not actually demand extended customization and that thus are unlikely to purchase a customized car.

From the branding perspective, an extended customization offering does not align with the features and values identified as facilitators of The Company’s brand repositioning of increasing social status and progressiveness. The offering however neither contradicts the features nor the values, meaning it should not hamper the brand repositioning either. However, this lack of alignment results in that the idea that an extended customization offering should strengthen the brand image is not supported.

In conclusion, combining all three perspectives, this study with its given resources has not been able to find support for a Company implementation of an extended customization offering. Further, it has not found support for that extended customization should strengthen the Company brand. That is, based on the findings of this research, customization within the automobile industry is deemed to be a trend among suppliers and not necessarily the future for actors within the automobile industry.

6.1 Future Research

As has been noted throughout this report, this study has access to limited resources, which explains why we are unable to access the intended customers and which could explain why such little interest in extended customization can be identified. If The Company decide to pursue extended customization, further research is needed before deciding to implement such an offering. First and foremost, The Company need to identify an actual demand from a suitable customer group in a selected cultural context for a customization offering. From there, the prioritized values need to be identified in a similar manner as in this study. As has been explained, the prioritized values by customers in this study (mainly utility, followed by uniqueness and self-expressiveness) are of little relevance since they come from customers who do not demand customization in the first place, meaning they are unlikely to actually purchase a customized car regardless of the values it offers.

In addition, it would be beneficial to investigate the commercial success of extended customization and bespoke offerings in the automobile as well as other industries, to further verify the support from the supplier perspective. It is also important to note that The Company's main competitors focus on offering utility, uniqueness and self-expressiveness in their extended customization offerings, not prioritizing hedonic and creative achievement values, meaning The Company will not differentiate themselves from competitors should they offer only the first three values. However, depending on the results of the further research to identify suitable customer groups, The Company will need to determine whether offering also hedonic and creative achievement values will actually add value to customers.

Finally, The Company need to further investigate if and how an extended customization offering can contribute to the brand repositioning journey, if strengthening the brand is indeed a prerequisite for the attractiveness of extended customization as a concept. If not, The Company should explore other possibilities of strengthening the brand, such as the possibility of developing hedonic values that are separate from the co-design process as such values have been found to be appreciated by customers. For example, the overseas delivery program is much appreciated by the American customers and is believed by The Company experts to attract also premium customers from other markets.

6.2 Limitations

This study is performed in a Company specific context, meaning although the findings in general may be relevant for other brands, some learnings are brand specific and thus less applicable to companies with other brand strategies, even within the automobile industry. Likely, interviewees both in the form of potential customers and in the form of The Company premium market experts adapt their answers according to the company that we as researchers are serving. Further, we as researchers are likely affected by the context of The Company.

Furthermore, the Chinese and Indian exchange student interviewees are based partly on convenience sampling and may thus not provide a completely accurate view of the preferences or expectations of the general Chinese or Indian customer. Reasons for this include that some of the interviewees in this study may not have the economic power to buy customized cars and therefore do not see the value of customizing, as it is beyond their economic reach. The lack of interest for customization found among the interviewees can therefore not be interpreted as a general lack of interest among those entire markets, as there may exist a demand among potential customers with greater economic power. Similarly, the American interviews may not be generalizable enough to be used for proving a lack of demand for extended customization on the entire American market, but rather for stating that this study lacks evidence of such demand. In conclusion, due to limited resources of this study we have resorted to a sample based on convenience. Before further recommendations can be made, further studies on the target markets are thus suggested.

7. References

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Appendix

Full hypotheses yielded from initial interviews

The hypotheses, grouped according to their categories, are presented below along with whether the hypotheses within each category are mutually exclusive (OR) or whether several hypotheses within the category can hold true (AND/OR). For each hypothesis, the number of interviewees who support the hypothesis (out of eight possible) is also presented.

Category 1. The customer is (AND/OR):
a. A *very* rich person. (7/8)
b. Customers who are not very rich, but who still are wealthy and have an interest in cars which makes them willing to spend proportionally larger amounts of money on their car. (5/8)
c. "Young achievers", i.e. young people who have a high salary for their age. (1/8)
d. "Hipsters", i.e. people who want to be unique but who do not want to alter the entire car. (1/8)
e. Women who are gaining increasingly greater economic power, especially in growing economies. (1/8)

Category 2. A customization offering will be suitable for (AND/OR):
a. High-end cars. Customers who will buy these cars are e.g. previous customers of the cars within The Company's premium segment. (8/8)
b. Medium class segments, i.e. also medium segment cars. (4/8)

Category 3. The customer prioritizes (AND/OR):
a. Aesthetic features such as exterior and interior colors, materials and stitching. (6/8)
b. Brand of the car. (5/8)
c. Having customization options beyond aesthetics. (3/8)
d. Connectivity, which will come to be a hygiene factor. (3/8)

Category 4. The customer's approach to the purchasing process is: (AND/OR)
a. They want many customizable options and want to be involved in the process, able to affect details since it is very important that the final design of the car matches their exact needs. (4/8)
b. They want "crème de la crème", i.e. they want the best available option on any choice but do not have the time or interest to engage in all of the choices available. Therefore, they have a more-is-more approach and let a designer make the exact choices based on their expressed needs. (2/8)
c. They do not want to alter the entire car, but only specific features such as exterior color and thus do not need to be very active in the purchasing process. (2/8)

Category 5. The markets with the most potential for a customization offering are (AND/OR):
a. China (7/8)

b. India (5/8)
c. The U.S. (4/8)
d. The Middle East. (3/8)
e. Europe, although a smaller market. (2/8)

Category 6. The customer's reason or purpose of buying a customized car is (OR):
a. They want a customized car because they seek uniqueness, since they have special interests, needs or values. That is, the customers are enthusiasts. (4/8)
b. Customizing is trending and the customer want to show off. (4/8)

Category 7. The selling point of the customized car is (OR):
a. Obtaining a "perfect car", i.e. the final product is in focus. (5/8)
b. The fun and excitement the customer gains from the process of designing something on their own. (3/8)

Category 8. The customer's purchasing decision (OR):
a. Is greatly influenced by their environment, mainly family and social group(s). (4/8)
b. Is not influenced by family and social group(s). (4/8)

Table of Results from Interviews with Students and Customers

Reason for buying their current car	Low maintenance cost	Appearance	Best value for money	Comfort	Safety features	Dependability	Quote
China		x	x	x			“Quite cheap car, both in price and in gas consumption.”
India	x	x	x			x	“Dad bought the Sedan, he is not technical but only bought it because of its looks. He bought the hatchback because it was easy to drive and had low maintenance costs.”
USA		x		x	x	x	“Dependability would have to be the first followed by safety and then beauty.”
What cars are used for	**Transport**	**Joy of driving**	**Leisure**	**Work**			**Quote**
China	x			x			“We use the car to go grocery shopping, and my father use it to pick me up when we study late in school.”
India	x	(x)					“The car is very important, we do a lot of outside the city trips. It’s also important in order to be able to transport to hospitals and stuff like that. I like to drive but the car is not that fun to drive.”
USA	x		x	x			“Work and travel”
Preferred appearance of cars	**Discreet**	**Classical**	**Unique**				**Quote**
China	x	x					“I don’t want to stand out but rather to fit in.”
India	x	x					"My father prefers classic cars; both his cars are white."
USA	x	x					"We're quite conservative with our cars, don’t want to be showy."
Wants to further customize their cars	**No**	**Yes**					**Quote**
China	x						"I would not be interested in designing it myself"
India	x						“I don’t find it appealing to customize too much, I trust the manufacturer to have done the right design choices.”
USA	x						“Absolutely not. If anything, there were too many choices!”
What they want to customize	**Performance**	**Exterior**	**Interior**				**Quote**
China		x					“The color of the car on the outside is the most important design thing.”
India	x	x					“I Would like a tuned engine.”
USA		x	x				"Exterior color would be the main thing."

Wishes to participate in the design process	**No**	**Yes**					**Quote**
China	x						“I am not interested in participating in designing the car.”
India	x						“I don’t find it appealing to customize too much, I trust the manufacturer to have done the right design choices.”
USA							
Influence on purchase decision	**Takes advice from friends and family**	**Takes advice but makes final decision on their own**	**Decides by themselves**				**Quote**
China		x					“I am influenced a bit by my friends and family but in the end I make my own decisions.”
India		x					“I value input from other people when buying cars.”
USA							
Importance of brand	**Important**	**Not important**					**Quote**
China	x						"I would rather choose a brand I like than a “perfect” car from another brand, especially not Chinese."
India	x						“I’m not so specific, but I like a bit expensive brands. But not my dad - he likes low maintenance costs. I would prefer a BMW, and my father would prefer Hyundai. I would consider other brands than BMW as long as they are premium.”
USA							
Brand loyalty	**Loyal**	**Not loyal**					**Quote**
China		x					
India	x						
USA							
View of the Company brand	**Overpriced**	**Safe cars**	**Premium**	**Reliability**	**Brilliant design**	**Attention to detail**	**Quote**
China	x	x	x				“The Company's cars are safer, and that’s important to me.”
India	x	x	x				“The Company is seen as overpriced as they offer the same as the German brands but to a higher price.”
USA		x	x	x	x	x	“For me, the Company stands for strength, safety, and brilliant design.”