



Aalto University
School of Business

Mikkeli Campus

MAKE-TO-ORDER BUSINESS MODEL: SLOW FASHION AS A STRATEGY

Aino Kreetta Helena Valonen

International Business
Bachelor's Thesis
Supervisor: Susan Grinsted
Date of approval: 6 April 2021

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Degree: Bachelor of Science in Economics and Business Administration

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Objectives

The main objective of this study was to create an effective strategy for an online make-to-order business that practices slow fashion and targets mainly women as customers. Additional objectives of this study were to 1) reveal customer segments and markets that make-to-order businesses could target 2) define what is the unique value that make-to-order businesses bring to customers 3) identify the core resources and capabilities that make-to-order businesses utilize.

Summary

This research conducted both individual in-depth interviews and a survey. Individual in-depth interviews aimed to add to the understanding of what current made-to-order businesses offer and why. The survey aimed to understand what consumers demand and expect from made-to-order businesses.

Conclusions

The aspects of an effective made-to-order strategy included consideration to slow fashion, creating a unique customer experience and choosing the right production process regarding desired flexibility. Additionally, the made-to-order business model is suitable to compete in the middle market segment or in the luxury market. Made-to-order businesses should consider customization strategies and using online presence and technology strategically.

Key words: slow fashion, made-to-order fashion, sustainable fashion

Language: English

Grade:

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ABSTRACT

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1. INTRODUCTION

1.1 Background

Make-to-order is the traditional way of producing clothes. People either made their own clothes or commissioned professional seamstresses to sew clothes according to their specifications (Thomas, 2019). However, the invention of the sewing machine and the introduction of fashion collections changed the way clothes were produced, and retailers began to produce standard sized clothing in domestic factories (Thomas, 2019). When the tariffs to international trade were lowered, retailers began to offshore production and the concept of fast fashion was born (Thomas, 2019). Consumers started to prefer the trendy fast fashion clothes that could be bought at a low price (Thomas, 2019). After the expansion of fast fashion, make-to-order businesses have been mainly focused on producing couture fashion, bespoke items, such as wedding dresses, t-shirts or suits for men and swimwear (Kabaivanova, 2015; De Cleyre, 2019). Recently, however, some businesses have started to offer affordable everyday make-to-order clothing for women (Wilkinson, 2020). Make-to-order for women began as an Instagram trend (Wilkinson, 2020). Cary (2020) suggests that because these online make-to-order brands were committed to slow fashion, more and more businesses were inspired to offer make-to-order clothing. Furthermore, these online make-to-order brands have thrived during the Covid-19 pandemic (Murray, 2020).

1.2 Research Problem

As make-to-order clothing brands targeting women have recently been very successful, research about the make-to-order business model as a strategy becomes beneficial. This research focuses mainly on businesses that offer make-to-order for women as a new phenomenon. Additionally, the phenomenon of slow fashion-inspired make-to-order has not been researched before. Therefore, this Bachelor's Thesis is an exploratory research that focuses on make-to-order inspired by slow fashion as a business strategy in the context of the fashion industry.

1.3 Research Questions

This research conducts both individual in-depth interviews and a survey to answer the following research questions:

- 1) How is make-to-order business model connected to slow fashion?
- 2) Which variables during the creation and production of make-to-order clothing add value in the eyes of consumers, and must therefore be part of a make-to-order strategy?
- 3) What assumptions and expectations do consumers have about the make-to-order business model?

1.4 Research Objectives

The main objective of this research is to create an effective strategy for online make-to-order businesses that practice slow fashion and target mainly women as customers. In addition to the main research objective, this research attempts to 1) reveal customer segments and markets that make-to-order businesses could target 2) define what is the unique value make-to-order businesses bring to customers 3) identify the core resources and capabilities that make-to-order businesses utilize. Therefore, this research strives to understand the key success factors of a make-to-order clothing business, and to create an effective make-to-order strategy that utilizes the core capabilities of make-to-order businesses while responding to consumer expectations.

1.5 Outline

First, a Literature Review is conducted to assess the connection between make-to-order and slow fashion, and to discuss and analyse the make-to-order business model in the context of the fashion industry. Based on the Literature Review, a conceptual framework is created to capture the core idea of a make-to-order business that practices slow fashion. Then, individual in-depth interviews and a survey are

discussed as research methodology. Then, findings are presented, followed by discussion and analysis. Lastly, conclusions are drawn.

1.6 Definitions

Make-to-order business: A make-to-order business starts the production of a clothing item after an order has been received and is therefore able to offer customized products (Kabaivanova, 2015). A make-to-order business usually offers predetermined customization options for the customer to choose from (De Cleyre, 2019).

Fast fashion: A fast fashion business operates by copying fashion designers' designs presented in runways, reproducing them by using lower-quality fabrics, and selling these garments at low prices which is made possible by manufacturing in countries where cheap labour is available (Thomas, 2019).

2. LITERATURE REVIEW

This Literature Review first discusses fast fashion in the context of economic, social, and environmental unsustainability, and indicates a change in consumer behaviour. Fast fashion is only briefly discussed as it is somewhat outside the scope of this Literature Review. However, some understanding of fast fashion is essential to demonstrate the shifting fashion industry trends, and the key ideas of slow fashion and make-to-order. Next, slow fashion is discussed as an opportunity for businesses to answer these changing consumer demands. Then, the connection between slow fashion and make-to-order business model is suggested by referring to a number of slow fashion studies and the business strategies of some of the current make-to-order businesses. Additionally, make-to-order business model is discussed and analysed in the context of the fashion industry. Lastly, a conceptual framework that captures the core idea of a make-to-order business practicing slow fashion is established.

2.1 Introduction

Many fashion companies have adopted fast fashion as a strategy because producing trendy low-quality clothes at a fast pace can be economically profitable (Fletcher, 2015; Gunner, 2019). However, as will be explained in the next section, fast fashion causes environmentally and socially harmful consequences (Fletcher, 2015; Gunner, 2019), many consumers have started to change their consumer behaviour and demand environmentally and socially responsible business practices from fashion companies (Global Fashion Agenda, 2019). As slow fashion emphasizes the production of durable, high-quality clothing items produced in a sustainable and ethical manner (Jung & Jin, 2016), slow fashion is presented as an opportunity to respond to the changing consumer demands. Furthermore, the connection between slow fashion and make-to-order is explored, and it appears that slow fashion and make-to-order have many common characteristics. The make-to-order business model strengths, weaknesses, opportunities and threats are analysed. Lastly, a conceptual framework explores the process of a make-to-order business that practices slow fashion.

2.2 Fast fashion in the context of economic, social, and environmental unsustainability

When fast fashion emerged, it changed the fashion landscape significantly by introducing a business model that is able to produce trendy clothes sold at a cheap price. Thomas (2019) discusses the consequences of fast fashion and reveals that the fashion industry witnessed a rise of fast fashion in the late 1980s. Fast fashion businesses operate by reinterpreting fashion designers' designs presented in runways, reproducing them by using lower-quality fabrics, and offering these garments at low prices, which is made possible as manufacturing costs are cut by producing in countries where cheap labour is available (Thomas, 2019). Cachon and Swinney (2011) discuss the value of implementing a fast fashion system and complement Thomas's (2019) description of fast fashion by suggesting that fast fashion is quick response techniques combined with enhanced design techniques to produce trendy products with short lead times to market. However, the value of the fast fashion system

can be questioned in terms of economic, environmental, and social sustainability. Producing trendy clothes sold at a cheap price has been economically profitable while social and environmental resources have been exploited by fast fashion companies.

Fast fashion can be deemed to be economically profitable. Even though Fletcher (2015) and Gunner (2019) mainly discuss the negative impacts of fast fashion, Fletcher (2015) concedes that fast fashion's high speed can be used to increase sales and economic growth by mass-producing globally standardized clothing items that can be sold efficiently in large quantities while Gunner (2019) suggests that as consumers are provided with constantly changing cheap products, fast fashion retailers can reap the financial rewards. However, both Fletcher (2015) and Gunner (2019) suggest that fast fashion became problematic when consumers increased the speed of consuming and replacing garments, resulting in garment worker exploitation and growing amounts of fashion waste. The World Commission on Environment and Development (1987) reported that economic growth is not sustainable if it compromises future generations' abilities to meet their own needs. Even though fast fashion can be deemed to be economically profitable, the harmful environmental and social consequences should be highlighted.

The negative environmental consequences of fast fashion are profound. Gunner (2019) discusses the impact of fast fashion on the environment and argues that fast fashion causes harmful environmental consequences that include natural resource depletion, use of toxic chemicals that pollute the waterways, and large amounts of textile waste. Fletcher (2015) highlights the issue of climate change that stems from increased pollution, and states that the large amounts of textile waste result from consumers replacing clothes rapidly as the use of low-cost materials and labour lead to poor quality. Highlighting the amount of textile waste, Thomas (2019) suggests that an average piece of clothing is worn only 7 times and points out the issue of overproduction by stating that 20% of produced clothing items end up being unsold. The cycle of fast fashion producing low-quality garments in large quantities is fuelled by consumers looking for trendy pieces of clothing only to discard them quickly, and the cost of fast fashion is the exploitation of natural and human resources.

As fast fashion companies produce cheap clothing items in large quantities, the labour costs are cut which has led to a number of social responsibility issues. The production of cheap fast fashion clothing has led to offshoring and subcontracting which in turn, has led to a lack of safety enforcement during the production process in fast fashion's fractured supply chains (Thomas, 2019). Thomas (2019) provides an example by describing the Raza Plaza garment factory accident that killed 1134 garment workers in Bangladesh. In addition to a lack of safety, garment makers are impacted by low salaries and worker exploitation (Clark, 2008) or even the use of forced labour (Gunner, 2019). Salaries are so low that according to Thomas (2019: 7) 'fewer than 2 percent of workers in the clothing industry earn a living wage'. The aforementioned issues highlight how fast fashion's quest for economic profit has led to social and environmental responsibility issues that make the fast fashion business model quite unsustainable.

2.3 A shift in consumer behaviour creating demand towards sustainable business practices

Due to the negative impacts of fast fashion, many authors anticipate a shift in consumer behaviour resulting in consumers demanding socially and environmentally sustainable business practices from fashion companies. McKinsey & Company (2020a) publish an annual report called State of Fashion that analyses data from surveys and conducts industry expert interviews to predict global fashion industry trends. As Covid-19 was a significant phenomenon that affected the fashion industry, McKinsey & Company (2020a) published a State of Fashion Coronavirus Update report that predicts that Covid-19 will cause a shift in consumer behaviour that will impact the fashion industry significantly as consumers start discouraging over-consumption and demanding sustainable business practices from companies. This prediction seems to be correct as in their report State of Fashion 2021 McKinsey & Company (2020b) found in their survey that 65 percent of consumers value durable, high-quality items while trendiness of the item was one of the least important factors. Additionally, three in five consumers indicated environmental impact and promotion of sustainability to be a significant factor that is considered when making purchasing

decisions (McKinsey & Company, 2020b). WGSN (2020) predicts similar consumer behaviour by stating that consumers will buy less but better products and assess longevity, environment, localism, ethical labour and transparency when making purchasing decisions. These results indicate a shift in consumer behaviour away from trend-chasing low-cost fast fashion consumed in large quantities, creating demand for businesses that produce durable high-quality clothing items in a sustainable manner.

As consumers demand more socially and environmentally sustainable business practices from fashion companies, they also demonstrate willingness to change their purchasing behaviour. The Nielsen Company (2015) found in their survey that 66% of consumers would be willing to pay more for sustainable products, and especially Millennials and Generation Z demonstrated most willingness to pay extra. It is important to note that the Nielsen Company (2015) did not include clothing items in their survey. However, due to the impressive sample size of 30 000 consumers surveyed globally, the survey is deemed reliable indication of consumers' general buying habits. The results from McKinsey & Company (2020a) confirm this trend by stating that sustainability is especially important to Generation Z and Millennial shoppers. To demonstrate why consumers would be willing to pay extra for sustainable offerings, Global Fashion Agenda (2019) identifies differentiation attributes, such as responsibly sourced and recyclable materials, that make consumers willing to pay extra for sustainable offerings. As consumers increasingly demand sustainable business practices and demonstrate willingness to pay a price premium for sustainable offerings, business models that demonstrate sustainability as a core strategy, could be successful in attracting consumers with shifting purchasing behaviours.

Consumer demand for sustainable business practices alone is not enough to ensure sustainability in the fashion industry. The results from the Pulse Of The Fashion Industry report by Global Fashion Agenda (2019) state that consumers increasingly consider social and environmental issues in purchasing decisions, and awareness of sustainability is highest among Millennials. However, Global Fashion Agenda (2019) warns that consumer demand for sustainable business practices is not strong enough to lead an industry-wide change, and as the fashion industry continues to grow rapidly, sustainable business practices are not implemented fast enough to meet the United

Nations Sustainable Development Goals or the Paris Agreement. Even though consumers increasingly consider sustainability in purchasing decisions, the Nielsen Company (2015) highlights the gap between the consumers who would like to purchase sustainable products and the consumers who actually purchased them. WGSN (2020) suggests that investors are increasingly evaluating social and environmental responsibility as a criterion. However, fashion companies are ultimately responsible for implementing sustainable business practices and creating a strategy that adds value to sustainable offerings. The key ideas of slow fashion and make-to-order align with the consumer demand for durable, high-quality products produced in a sustainable manner.

2.4 How can slow fashion respond to the changing consumer demands?

To indicate how slow fashion can potentially answer the changing consumer demands, an understanding of what slow fashion entails is essential. Clark (2008) identified three attributes that describe slow fashion. These attributes include transparent production, meaning that the consumers have increased amounts of information available about the production process, the use of local resources in production, and sustainable products that create an emotional connection to the user which, therefore, increases the value and the use of the product (Clark, 2008). Similar to Clark's (2008) view about slow fashion, Pookulangara and Shephard (2013) define slow fashion as durable quality products with timeless design that are produced responsibly, taking into consideration social responsibility, sustainability and ethics. Jung and Jin (2014) develop the concept of slow fashion further by identifying five dimensions that describe slow fashion. These dimensions indicate that slow fashion is unique, durable and high-quality clothing that is produced by local highly skilled labour that is compensated fairly (Jung and Jin, 2014). It appears that slow fashion entails many of the product attributes that consumers are currently looking for.

By utilizing the core ideas of sustainability, longevity, high quality, transparency, and localism that slow fashion advocates for, businesses could potentially provide

consumers offerings that respond to the changing consumer demands. Fletcher (2015) introduces slow fashion as a system and claims that slow fashion drives a change in the values of consumers by creating awareness towards business models that incorporate sustainability as a core strategy, and therefore challenge the prevailing fast fashion business model. Slow fashion is timeless, high quality and durable pieces of clothing that are produced locally with traditional production techniques that celebrate craftsmanship, diversity and long-term relationships (Fletcher, 2015). Slow fashion product attributes introduced by Fletcher (2015), coincide with the observation that consumers are currently looking for minimalist, timeless pieces of clothing that are of high quality and durable and therefore, can be worn for a long time (McKinsey & Company, 2020a; McKinsey & Company, 2020b). Businesses that adopt the core ideas of slow fashion could provide offerings that are attractive to consumers with changing values and mindsets.

Slow fashion incorporates the idea of consumers buying fewer products that are of higher quality and, therefore discouraging overconsumption and overproduction. Slow fashion attempts to slow down the production process by producing in small quantities to guarantee the high-quality of the clothing items, and slow consumption is emphasised to increase the longevity of the product (Jung & Jin, 2014). The results from Global Fashion Agenda (2019) indicate that high quality was the most significant fashion purchase criteria of consumers which suggests that consumers are increasingly considering clothing attributes linked to slow fashion when making purchasing decisions. Watson and Yan (2013) reveal that slow fashion consumers value durable, high quality clothing that is versatile, fits well, and aligns with the self-image of the consumer. As more and more consumers seek slow fashion products, it is essential to identify what types of stores offer slow fashion clothing. Watson and Yan (2013) emphasize that a store that fits the concept of slow fashion perfectly has not been identified, but instead slow fashion is identified by the types of products offered. This Bachelor's Thesis attempts to establish a novel connection between slow fashion and make-to-order clothing attributes. The connection between slow fashion and make-to-order would add to the knowledge of what types of stores offer slow fashion clothing.

2.5 Connecting slow fashion and make-to-order clothing attributes

The connection between slow fashion and make-to-order has not been researched in an academic manner before. However, some authors have referred to slow fashion when discussing make-to-order clothing. Emma Slade Edmondson of ESE Consultancy cited in Murray (2020) suggests that make-to-order businesses promote slow fashion by having no overproduction while producing durable high-quality clothing. Wilkinson (2020) suggests that addressing sustainability is a main reason to adopt a make-to-order business model which is simultaneously a slow fashion business model. Some authors have referred to slow fashion product attributes when discussing make-to-order clothing. Brannigan (2020) suggests that make-to-order is sustainable and ethical clothing that is produced slowly and consciously while Cary (2020) suggests that make-to-order is craftsmanship dedicated to slow fashion. De Cleyre (2019) states that made-to-measure and traditional couture fit the concept of slow fashion but does not mention make-to-order clothing. Additionally, many make-to-order brands, such as Before July, AK Threads and House of Sunny, refer to slow fashion when discussing their business model or strategy (AK Threads, n.d.; Before July, 2018; House of Sunny, 2018). It is evident that some connection between make-to-order and slow fashion exists. To establish an academic connection between slow fashion and make-to-order clothing, this section connects slow fashion and make-to-order clothing attributes.

Before the product attributes of slow fashion and make-to-order can be connected, an understanding of what make-to-order is should be demonstrated. Clark (2008) believes that slow fashion has the ability to challenge the traditional hierarchies of producer and customer. Taking Clark's (2008) view further, it is suggested by Sener, Biskin and Kilinc (2019) that slow fashion has the ability to bring the whole production process closer to the customer by making the customer part of the production process. Make-to-order fashion is relevant in the context of making the customer part of the production process as the basic idea of make-to-order is to produce clothing items after the customer has purchased them and customize the purchased clothing items according to the specifications of the customer (Kabaivanova, 2015). Make-to-order

clothing is produced according to each customer's specifications, where the specifications available are predetermined, which distinguishes make-to-order from made-to-measure, bespoke and couture clothing (De Cleyre, 2019). This Bachelor's Thesis focuses specifically on make-to-order businesses that produce clothing for women and operate mainly online but might have a physical boutique.

Slow fashion and make-to-order both advocate high-quality clothing items that are intended to be worn for a long time. Slow fashion promotes sustainable business practices by encouraging consumers to shift from buying a large quantity of low-cost products to buying fewer high-quality products (Fletcher, 2007). Slow fashion is designed to be classic, long-lasting and seasonless which is meant to increase the wearability of the product (Jung & Jin, 2014; Fletcher, 2015; Pookulangara & Shephard, 2015). Jung and Jin (2014) indicate a functionality dimension to describe the durability and versatility of the slow fashion clothing item. Watson and Yan (2013) found that slow fashion consumers receive satisfaction from buying high-quality clothing items that are versatile and fit their personal style and wardrobe. The make-to-order business House of Sunny can be used as an example of Jung and Jin's (2014) functionality dimension as their products are intended to be multifunctional and wearable in different conditions which is achieved by introducing detachable sleeves (House of Sunny, 2018). Make-to-order businesses might be able to create added customer value to slow fashion offerings by producing clothing that is personalized according to each customer's body shapes and wishes which can potentially lengthen the lifespan of the product further.

Slow fashion businesses strive to be socially responsible which has led to the use of local resources in production. Pookulangara and Shephard (2013) indicate that slow fashion clothing items are produced with care and precision to take into account social and environmental responsibility issues during the production process. Fletcher (2015) expands this view further and indicates that slow fashion is small-scale production utilizing traditional craft techniques. Jung and Jin (2014) identify equity, localism and authenticity dimensions which describe fair compensation for slow fashion producers, a preference for consumers to buy from local businesses, and the use of highly skilled labour utilizing traditional production techniques and craftsmanship. Clark (2008) offers a new perspective on the issue of local production by suggesting that local

production provides clothing items that are culturally distinct from the mainstream mass-produced standardized clothing items. Therefore, slow fashion can be considered to be socially and environmentally responsible which stems from the use of local production.

The use of local resources and labour is evident in the business models of current make-to-order businesses. The make-to-order business MaisonCléo claims to source surplus fabrics from French Couture Houses and designers and produce in France (MaisonCléo, n.d.) while By Megan Crosby claims to source deadstock fabrics and produce in the United Kingdom with a small team of six (By Megan Crosby, 2021). These make-to-order businesses use local resources and production to ensure social responsibility issues such as fair wages, and by repurposing remnant and deadstock fabrics, sustainability is also taken into consideration. In addition to using local resources and labour, some make-to-order brands include local traditions and craftsmanship in their designs. For example, a make-to-order brand Abiola Olusola expresses traditional African culture and production techniques through the design of the clothing items (Abiola Olusola, n.d.). It appears Jung and Jin's (2014) slow fashion dimensions of equity, localism and authenticity also apply to make-to-order brands. The use of local and experienced labour allows make-to-order brands to ensure that fair labour practices are used, which guarantees the high quality of the clothing items.

Slow fashion and make-to-order both advocate for sustainability in the fashion industry. The reasoning of slow fashion for sustainability stems from the fact that products that are produced in good labour conditions are of high-quality and will not be discarded quickly, and therefore, fashion waste, pollution and resource consumption is reduced (Pookulangara & Shephard, 2013). Make-to-order incorporates sustainability at the core of the business strategy by eliminating overproduction, which according to Brannigan (2020) decreases waste as only what is needed is produced. While all current make-to-order businesses have eliminated overproduction, they have also incorporated additional sustainability practices into their business models. For example, MaisonCléo avoids unnecessary packaging, By Megan Crosby uses environmentally friendly dyes, Alabama Chanin uses organic cotton that is sourced sustainably, and AK Threads has created a fully circular business model that repurposes old garment to create new ones (AK Threads, n.d.;

MaisonCléo, n.d.; Alabama Chanin, 2021; By Megan Crosby, 2021). It is evident that sustainability is at the core of both slow fashion and make-to-order.

As slow fashion items are intended to be high-quality and long-lasting, according to Pookulangara and Shephard (2013) the items establish an emotional connection to the wearer. Additionally, Jung and Jin (2014) identified an exclusivity dimension to describe how slow fashion consumers enjoy the product's uniqueness and scarcity. Slow fashion is also about the need to be creative and establishing a personal identity through the way we dress (Fletcher, 2007). Current make-to-order businesses also emphasize Jung and Jin's (2014) exclusivity dimension. For example, a make-to-order business Olivia Rose the Label states that items are produced in limited quantities which makes each piece extremely unique while another make-to-order business Non Manon emphasizes building individual style through items that are timeless and meant to be cherished so long that the items can be passed onto next generations (Non Manon, 2021; Olivia Rose The Label, 2021). Slow fashion can invite consumers to be a part of the design process to satisfy the need for creativity and identity (Jung & Jin, 2016). Make-to-order is essentially about bringing the customer to be a part of the design process. Make-to-order could potentially create products that are even more long-lasting as customers have the opportunity to request a piece that satisfies and fits them perfectly.

Make-to-order clothing and slow fashion seem to have many common characteristics such as social and environmental responsibility, high quality, longevity, uniqueness and timelessness which is why make-to-order has significant opportunities to satisfy both slow fashion consumers, and consumers with shifting values towards sustainability and quality of the clothing items. A significant setback for the success of sustainable clothing has been the gap between consumers' attitudes and actual behaviour regarding sustainability, and Jung and Jin (2014) appoint mismatch to stem from limited self-expression possibilities of sustainable fashion. However, make-to-order businesses have an opportunity to respond to this mismatch as they are able to offer sustainable pieces of clothing that can be customized according to each customer's wishes. The next section analyses the make-to-order business model strengths, weaknesses, opportunities and threats in the context of the fashion industry to evaluate the make-to-order business model as a strategy.

2.6 Analysis of the make-to-order business model in the context of the current fashion industry

The make-to-order business model is set up in a way that allows sustainable operations and personalization according to each customer's wishes. McKinsey & Company (2020a) urge businesses to incorporate sustainability strategically into their business models. Make-to-order businesses produce the clothing item after the order has been received (Murray, 2020), and therefore, are able to offer customization and personalization according to each customer's measurements and wishes. Holweg and Frits (2001) point out the benefits by indicating that there is no wasteful overproduction or excess inventory that has to be discounted at the end of a fashion season, and therefore, make-to-order businesses are able to maximize sales at full price. In addition, make-to-order businesses are able to reduce waste by sourcing fabrics in smaller quantities. For example, a make-to-order business Cawley Studio orders only the amount of fabric that is needed to meet orders and repurposes any remnant fabrics (Cawley Studio, 2021). Chitrakorn (2020) adds that the benefits of operating a make-to-order business is the ability to predict customer demand and preferences without overproduction. However, Brannigan (2020) warns that minimizing excess inventory does not stop make-to-order businesses from sourcing fabrics from dishonest suppliers. While in some cases this might be true, the current make-to-order brands are generally very transparent about their production processes. For instance, a make-to-order business AK Threads believes that transparent supply chains that disclose information about production processes maximise social and environmental impact (AK Threads, n.d.) while MaisonCléo determines a receipt for its pieces of clothing that shows exactly how the brand landed on the selling cost for the item (Murray, 2020). McKinsey & Company (2020b) identify the trend of consumers demanding transparency about environmental impact and social responsibility. Make-to-order business model is definitely a step towards more sustainable, personalised and transparent fashion industry.

As the product is produced only after the order has been made, the customer has to wait for the product to arrive. According to De Cleyre (2019) the wait time for a make-to-order product can vary from two to eight weeks. The downsides of make-to-order

strategy is customer dissatisfaction of products being sold out, possible delays and the issue of returns (Chitrakorn, 2020). However, both DeCleyre (2019) and Murray (2020) claim that the make-to-order products are worth waiting for. Murray (2020) specifies that the fit and the cut of a make-to-order product is better which is why the product might be worth waiting for. To make the product worth waiting for, Holweg and Frits (2001) point out that a make-to-order strategy is only valuable if the company understands customer demand. Understanding customer demand includes what variations customers want in their make-to-order products (Holweg & Frits, 2001), and understanding what aspects of make-to-order businesses' strategies consumers like or dislike, and what is needed to meet consumer's needs (Brown, 2008). Chitrakorn (2020) emphasizes the importance determining what customers really want so that brands can demonstrate where they add value to the product. Therefore, this paper makes an exploratory contribution to the knowledge of make-to-order as a strategy and attempts to define what variables add value in the eyes of consumers and must therefore be part of a make-to-order strategy. In addition, this paper attempts to define what assumptions and expectations consumers have about the make-to-order clothing.

Make-to-order clothing is generally more expensive than fast fashion clothing. De Cleyre (2019) states that make-to-order clothing is sold at a higher price point while Murray (2020) claims that make-to-order brands price their garments in the mid-range price point to be cheaper than designer items but expensive enough to ensure sustainability and ethical responsibility. In addition to targeting shoppers in the mid-range price point, as make-to-order brands can be completely size-inclusive (Murray, 2020), make-to-order businesses could specifically target this customer segment. While prices are higher, Cunningham (2019) states that profit margins can also be significant which makes make-to-order profitable. Offering personalization and online customer experiences were identified as opportunities that add value into garment which incentivises customer to shop at full price (McKinsey & Company, 2020a). The connection between a make-to-order business and the customer was deemed valuable business aspect (Cunningham, 2019). The previous section established that slow fashion and make-to-order are quite similar. Watson and Yan (2013) found that slow fashion consumers expect the clothing to be higher in price and consider clothing purchases as an investment, which is why the higher price of make-to-order might not

be an issue. However, if make-to-order attempts to respond to the changing consumer demands, making make-to-order clothing more affordable could be a tremendous business opportunity, and technology might help make-to-order businesses to achieve this.

As stated earlier, this paper focuses mainly on online make-to-order businesses dedicated for women's clothing that offer predetermined specifications. As most fashion brands do not offer any customization options, make-to-order businesses already have a competitive advantage, but some customers may still be unsatisfied with the final product. As Murray (2020) points out, these online make-to-order brands are largely dependent on customers measuring themselves, which can lead to a number of problems highlighted by Cordier, Seo and Thalmann (2003) that include unsatisfactory fit or drape. As De Cleyre (2019) suggests, some brands are modernizing the concept of make-to-order by utilizing technology. Technology can, for example, provide virtual spaces powered by augmented reality that enable virtual try-ons (Cunningham, 2019). Daanen and Psikuta (2018) describe how 3D body scanning can be utilized to construct a virtual fitting room where the customer can see the selected garment on their body. In a make-to-order situation, the customer could then indicate what changes they want in their make-to-order product (Daanen and Psikuta, 2018). As customers can see the garment on their body, utilizing 3D body scanning could reduce dissatisfaction as all customer wishes can be accounted for before constructing the garment. Additionally, 3D body scanning can be developed further to provide automated cutting (Daanen & Psikuta, 2018), automated sewing or 3D printing (Pardes, 2019). These technologies could reduce the cost of make-to-order clothing which is essential if make-to-order brands want to increase volume and sales (Pardes, 2019). As most fashion brands do not offer any customization options, the fit of a make-to-order product is fundamentally better than that of a standard size. However, if make-to-order brands combine technology with personalization, make-to-order brands might be able to capture strategic advantages.

While many make-to-order brands still operate on a small scale and traditional production techniques, some have developed or harnessed the latest technologies. Companies that are able to develop and harness the latest technology, such as 3D technologies, are able to capture future opportunities (McKinsey & Company, 2020a).

A make-to-order brand Frilly utilizes 3D rendering on their website that allows the customer to customize the product according to her wishes while seeing the customized features on the product (Frilly, 2019) while another make-to-order brand RedThread extracts 3D measurement data from full-body photos taken with a smartphone and combines measurements data with the results from a fit quiz in which the customer indicates her fit preferences (Pardes, 2019; RedThread, n.d.). Similar approach is used by designer Isabella Wren by utilizing body-scans to get a woman's measurements (Pardes, 2019) while make-to-order business Rapanui has taken a novel approach and developed a circular supply chain that uses both organic cotton and clothing waste as a resource and produces its products in a modern factory that takes advantage of automation technologies and real-time printing (Rapanui, 2017). Currently many make-to-order businesses utilize craftsmanship and traditional production techniques while make-to-order businesses that utilize technology could scale production up while maintaining the unique feeling of the clothing item.

As technology offers make-to-order businesses opportunities for growth, make-to-order businesses need to solve the issues of scale and single deliveries. Cunningham (2019) warned that the make-to-order business model is not easily scalable. However, as technology and automation offer make-to-order businesses opportunities for growth, Murray (2020) states that make-to-order businesses might have to be wary of scale. As slow fashion consumers enjoy the uniqueness of the product (Jung & Jin, 2014), make-to-order consumers will likely behave the same way. However, even though the behaviour of make-to-order customers is an aspect for future research, it is vital for make-to-order businesses to find a balance between growth and maintaining the unique feeling of the product. As make-to-order is intended to be sustainable, Pardes (2019) states that it is not sustainable to ship single orders. A make-to-order business House of Sunny has solved this issue by using slower shipping methods such as transportation via sea over air (House of Sunny, 2018). As customers can customize their make-to-order product, the feeling of uniqueness might still be maintained even if the business is gaining popularity.

This section identified variables such as customization, price, wait time, transparency and customer experience that need to be optimized to create an effective make-to-order strategy. Online make-to-order brands have been thriving during the Covid-19

pandemic (Murray, 2020). McKinsey & Company (2020a) provide an explanation to this phenomenon by stating that during the Covid-19 pandemic, consumers welcomed digital fashion shows and shopping in their lives and started to favour businesses that offer seasonless design, online shopping experiences specifically tailored to them, and that operate sustainably without producing environmentally harmful waste. McKinsey & Company (2020b) also state that most future business opportunities are in the areas of digitalisation and sustainability and make-to-order businesses have the opportunity to combine digitalization with sustainable operations. McKinsey & Company (2020b:9) encourage companies to adopt a demand-based business model and state that “Decision-makers must be bold. They must develop novel strategies - - focused on profitability, value, simplicity and downsized collections, rather than discounting and volumes”. Therefore, the make-to-order business model is ultimately an opportunity that allows companies to combine sustainability, personalization and technology to create unique products and customer experiences.

2.7 Conceptual framework

The make-to-order process, summarized in Figure 1, begins when the make-to-order business designs the clothing item and determines what specifications are available. The slow fashion process introduced in Pookulangara and Shephard (2013) incorporates sustainability and social responsibility into business models by constructing them as a part of the business strategy through the design, production and consumption stages. In the garment design stage, the garment is designed by emphasizing sustainability (Pookulangara & Shephard, 2013). Ceschin and Gaziulusoy (2016) discuss designing for sustainability and take Pookulangara and Shephard’s (2013) view of sustainable design further by indicating multiple ways of sustainable design. Sustainable product design is utilizing green or ecodesign practices, such as designing with recycled materials, as well as designing emotionally durable designs that create product attachment and therefore, encouraging the desired sustainable behaviour of increasing the longevity of the fashion item (Ceschin & Gaziulusoy, 2016). In the make-to-order process, garment design is influenced by

sustainability, and therefore, the desired outcome of longevity, high-quality and emotional connection to the clothing item is achieved.

It is vital for make-to-order businesses to understand which variables during the creation and production of make-to-order clothing add value in the eyes of consumers because next in the make-to-order process the customer orders the clothing item. Vargo and Lusch (2008) discuss the service-dominant logic, and how businesses and customers can create value together. Customer service can appear in the forms of co-production, co-creation and experience economy (Vargo and Lusch, 2008). In the make-to-order process, the co-production and co-creation of value begins when the customer indicates her measurements and personalizes the product according to her wishes. If variables such as customization options, price and wait times are optimised according to what the consumers want, value is created effectively. Holweg and Frits (2001) warn that it becomes expensive for make-to-order businesses to offer customization options that customers do not deem important. Therefore, this paper makes a novel contribution to the knowledge of what variables consumers want in the make-to-order products. Even though the customer enters her measurements and specifications online, and therefore does not have any human contact, the customer gains a sense of receiving personalized customer experiences as she is ultimately ordering a product made-to-order specifically for her.

After the product is ordered, the make-to-order business begins the production of the clothing item. Current and emerging technologies can be used to speed up the production process of make-to-order clothing. In the production stage of the slow fashion process, experienced labour is used to ensure the production of high-quality clothing items in fair labour conditions (Pookulangara & Shephard, 2013). To be socially responsible and to produce high-quality items, make-to-order businesses use local production that is compensated with fair wages, and production is usually located in high-labour cost countries. According to Brannigan (2020) make-to-order businesses are able to decrease waste in the production stage by producing only what is needed which helps to ensure that in the consumption stage, garments are worn with intention.

After the clothing item is produced, the customer will receive it. Vargo and Lusch (2008) state that value is still created at the consumption stage. It is vital for the make-to-order business to understand what assumptions and expectations customers have about make-to-order clothing so that the make-to-order process can be optimized to ensure customer satisfaction. In the consumption stage of the slow fashion process, the longevity of the clothing items is emphasised (Pookulangara & Shephard, 2013). Make-to-order clothing items ensure longevity by customizing each clothing item according to the customer's wishes which also helps to establish an emotional connection to the product and therefore, value is created each time the customer uses the product she is completely satisfied with. Sustainability is incorporated in each stage of the make-to-order process, and it is ultimately in the hands of consumers to decide if they buy make-to-order or not. Therefore, optimizing the variables to ensure customer satisfaction is crucial for the make-to-order strategy.

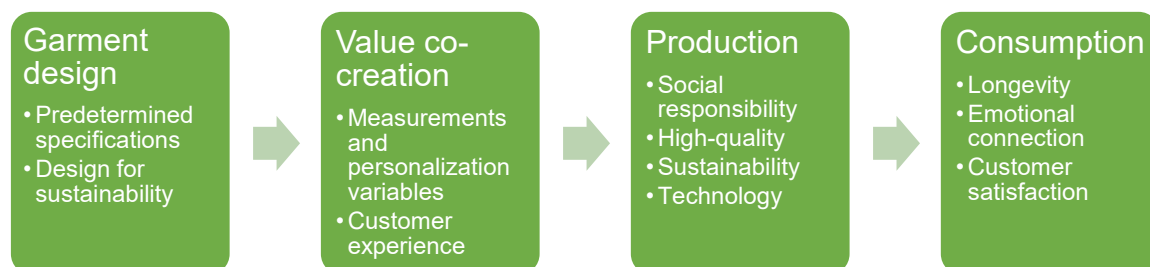


Figure 1: The make-to-order process

2.8 Conclusion

Consumers are shifting their purchasing behaviour and increasingly demanding environmentally and socially responsible business practices from fashion companies

(Global Fashion Agenda, 2019). The adoption of sustainable offerings has been hesitant because consumers do not find sustainable clothing appealing (Jung & Jin, 2014). Therefore, as make-to-order businesses are able to offer customized sustainable clothing, this Literature Review connected slow fashion and make-to-order clothing attributes. Slow fashion and make-to-order clothing seem to have many common characteristics such as high-quality, longevity, transparency and production in an ethical and sustainable manner by using local resources.

As make-to-order businesses have thrived during the Covid-19 pandemic (Murray, 2020), researching the make-to-order business model as a strategy becomes beneficial. This Literature Review identified variables such as price, wait time, custom sizing and personalization that should be optimized to create an effective make-to-order strategy. Therefore, this Bachelor's Thesis will next attempt to answer which variables during the creation and production of make-to-order clothing add value in the eyes of consumers, and therefore must be part of a make-to-order strategy. In addition, as make-to-order clothing is associated with assumptions and expectations such as sustainability and transparency, this Bachelor's Thesis will also attempt to answer what assumptions and expectations do consumers have about the make-to-order business model.

3. METHODOLOGY

This Bachelor's Thesis utilized both primary and secondary data. Secondary data consisted of the previously published literature cited in the Literature Review. As secondary data alone was not sufficient to answer the research questions, the collection of primary data became essential. According to Ragab and Arisha (2018) researchers with business-related topics have a number of quantitative or qualitative research methods to choose from. Quantitative research methods are used when the researcher strives to produce generalised findings by using statistical techniques while qualitative research methods are used when the researcher wants to gain an in-depth understanding of a phenomenon (Ragab & Arisha, 2018). Quantitative methods include experiments, surveys and observations while qualitative methods include

interviews, case studies and content analysis (Ragab & Arisha, 2018). Due to the exploratory nature of this Bachelor's Thesis, achieving both generalized findings about consumer preferences towards made-to-order clothing and gaining an in-depth understanding of made-to-order as a phenomenon becomes beneficial and therefore, both quantitative and qualitative research methods were utilized in this research to answer the research questions. As it would be difficult to conduct an experiment or observe consumer behaviour regarding online shopping for a made-to-order item, a survey was conducted. Additionally, due to the exploratory nature of the topic, there is a lack of case studies and previously published content and therefore, interviews were utilized. As this research conducted interviews simultaneously with the survey, this research utilized mixed methods design to be able to corroborate the results (Ragab & Arisha, 2018).

Individual in-depth interviews were conducted to collect detailed in-depth information about the production of made-to-order clothing and to understand the experiences, beliefs, motivations and attitudes of current made-to-order businesses. Additionally, the interviews helped in establishing an academic connection between make-to-order clothing and slow fashion. Made-to-order businesses were asked to describe their products and production processes to add to the understanding of what variations current make-to-order businesses offer in their make-to-order clothing and why. Furthermore, to assess which variations the larger population of consumers deem most important in make-to-order products, a survey was conducted. The survey also intended to establish which strategies would lead to customer satisfaction regarding made-to-order clothing. Also, the survey intended to measure consumer expectations and assumptions regarding make-to-order clothing. Due to the use of both quantitative and qualitative research methods, the results show both generalisable data and an in-depth understanding of made-to-order clothing as a phenomenon.

3.1 Qualitative interviews

The participants to the qualitative individual in-depth interviews were chosen based on purposive sampling. The sample of 5 participants were chosen based on the criteria

of being relevant for the study. The participants were pre-screened against the criteria that participants had to represent a made-to-order business and therefore, the participants were deemed relevant to the study as they all shared a common characteristic of representing a make-to-order business. Different kinds of make-to-order businesses were sought to receive broad perspectives from the field of make-to-order fashion.

Three of the interviews were scheduled and conducted via Zoom and recorded with the participant's permission. Two interviews were conducted via e-mail. At the beginning of each interview, the participant was informed that responses are confidential, and that the privacy of each participant is to be maintained throughout the research process. The interview duration varied between 39 minutes to 70 minutes. The interviews were semi-structured. Every participant was asked the same set of ten detailed open-ended questions. However, the researcher actively prompted participants to provide more elaboration if it was needed. The interview questions were carefully constructed based on the Literature Review. The interview questions can be seen in Appendix 1.

Interview questions one and two presented slow fashion attributes to make-to-order businesses, and asked participants which attributes could describe make-to-order clothing or the production of make-to-order clothing. Interview question three was aimed to assess whether make-to-order businesses are threatened by the same factors than slow fashion businesses are. The first three interview questions were aimed to assess the connection between make-to-order clothing and slow fashion. Interview questions four, five, six and seven allowed the researcher to understand the core resources and capabilities of the make-to-order businesses and assess what variations the make-to-order businesses offer in their clothing and why. These interview questions were aimed to reveal which customer segments and markets make-to-order businesses compete at, and what is the unique value that these make-to-order businesses bring to their customers. Interview questions eight, nine and ten assessed make-to-order clothing expectations and assumptions from the make-to-order business viewpoint.

Braun and Clarke (2006) state that thematic analysis is useful in identifying larger themes and patterns from detailed data, such as data gathered from individual in-depth interviews. As a first step in the thematic interview analysis, the interviews were transcribed based on the video recording which helps to improve accuracy and avoid loss of data (Canary, 2019). Transcribing means transforming verbal data into a written form (Braun & Clarke, 2006). The next step in thematic interview analysis is coding the data into categories (Braun & Clarke, 2006). Codes were assigned to the data by using Microsoft Word and an online tool Miro. Next, codes were collated to start identifying potential themes, and themes were reviewed, defined and named (Braun & Clarke, 2006). As a result, four broad themes emerged. The process of transcribing, coding and the extraction of themes was done by the researcher.

3.2 Quantitative survey

The purpose of the survey was to gather data that can be projected to consumers as a larger population. The participants to the quantitative survey were collected by using convenience sampling and participants were selected based on ease of accessibility. A self-administered survey was deemed an appropriate method for data collection as participants could complete the survey themselves. The survey was sent to participants via various social media channels such as Facebook and Instagram and respondents voluntarily completed the survey. To improve the participation rate, the researcher decided to organize a raffle among survey participants. One participant would win a 20€ gift card to a clothing store of their choice. Proper instructions and definitions of terms were used to make the survey easy to read and encourage participants to respond accurately. The participants were also assured that responses would be completely anonymous and confidential. The survey was designed to be about 5 to 10 minutes long.

The survey received 112 respondents. The average age of participants was 23,55 and the median age was 21. The minimum age was 14 while the maximum age was 55. The age statistics shows that survey results are especially applicable among Generation Z consumers. 72 participants were female, 39 were male and 1 was in the

“other” category. 71 % of participants lived in Finland, 11% in the United Kingdom and 6% in the United States of America. Other countries represented were Ireland, Germany, Vietnam, Australia, Canada, Denmark, Estonia, Ghana and India. The country statistics indicate that survey results are especially applicable among consumers in Western and developed countries. The survey was administered by using Webropol and analysed by using SPSS and Microsoft Excel.

Survey questions were crafted based on the Literature Review and can be seen in Appendix 2. As this Bachelor’s Thesis is an exploratory project, the questions were constructed by the researcher based on the Literature Review. The first question of the survey asked if the respondent had ever bought make-to-order clothing items. If the respondent answered “Yes”, specific questions appeared around the types of made-to-order items bought, the cost of the made-to-order items, where the items were bought from and how had the respondent heard about the make-to-order business. This section of the survey was designed to facilitate comparison of opinions between people who have and have not purchased made-to-order clothing and measure current consumer behaviour regarding made-to-order clothing. To further examine the connection between made-to-order clothing and slow fashion, respondents were next asked to rate the importance of slow fashion clothing attributes and select what slow fashion attributes they associate with the production of made-to-order clothing. The slow fashion clothing attributes examined were selected based on the discussion in the Literature Review and were the same in the individual in-depth interviews.

Next, the survey questions proceeded to gather data to develop an effective made-to-order strategy. Respondents were asked to rate the importance of specific customization and personalization options that current made-to-order businesses offer and assess how certain factors impact the likelihood of a consumer purchasing from a particular brand. These factors were all discussed in the Literature Review. Next, willingness to pay for a made-to-order clothing item was measured against an item not made-to-order. Willingness to pay was also measured against different customization and personalization options to see which customization options consumers are willing to pay more for. Willingness to wait for a made-to-order item was measured regarding a shirt and a pair of jeans to see if any variability exists between different kinds of

clothing items. Lastly, demographic questions that were asked was age, gender and country. Respondents were also able to leave their e-mail if they wanted to participate in the gift card raffle. Open-ended questions were coded by using the same thematic analysis approach that was used to code the individual in-depth interviews.

3.3 Limitations to methodology

The individual in-depth interviews as a methodology might have some limitations. As the interviews were held in English, it was a second language to some of the participants, making it harder for the participants to express their opinions clearly, and some information might have been omitted due to the participants not being able to phrase it. This issue was addressed by the researcher during the interviews as the researcher actively prompted participants to clarify when it was needed. As some interviews were held via Zoom and some interviews were held via e-mail, it was evident that the interviews held via Zoom were better in terms of amount of information received. However, the interviews held via e-mail still provided important insights despite the answers being shorter.

The survey as a methodology shows some issues with the sample. The survey received 112 respondents and no more could be collected due to time constraints. It could be argued that this sample size is not sufficient for precise statistical measurement. The average age of participants was 23,55 and the median age was 21. As survey results were indicated to be projected to consumers as a larger population, the mean and median age of the sample cause some difficulties. Therefore, it can be concluded that survey results are better projected to Generation Z consumers which also helps with the sample size issue as the population is smaller. Also, as most participants lived in developed Western countries, survey results are best applied to made-to-order businesses in Western countries. Due to the topic of the survey, it is natural that this survey attracted more female respondents, and possibly due to the young age of the respondents, many have not yet had the experience of purchasing a made-to-order item. Male and female respondents and respondents who have purchased and have not purchased make-to-order clothing can still be

compared, but results are more accurate regarding the group with more respondents. Also, when respondents were asked to indicate the approximate cost of the made-to-order item bought in their currency, most respondents did not indicate the currency, making it difficult to compare prices of the items, and this information had to be excluded from analysis. Due to the exploratory nature of this Bachelor's Thesis, there is a lack of previous studies in the field of made-to-order fashion, which meant that the researcher had to design many of the survey questions based on the Literature Review, and no existing frameworks could be utilized. However, this study acts as a starting point for other studies regarding made-to-order fashion.

4. FINDINGS

4.1 Interview findings

Four major themes extracted from the individual in-depth interviews were 1) The relationship between slow fashion and made-to-order fashion 2) Made-to-order attributes 3) Made-to-order production process and 4) Made-to-order consumer behaviour. Next, main ideas of each theme will be introduced.

4.1.1 The relationship between slow fashion and made-to-order fashion

All participants agreed that high-quality and an investment piece are attributes of made-to-order clothing. Four out of five participants agreed that high in value, emotionally durable and diverse are attributes of made-to-order clothing. Three out of five participants agreed that durable/long-lasting, timeless/classic, unique, sustainable/eco-friendly, good fit and flatters individual identity/creativity/self-image are attributes of made-to-order clothing. Only two participants agreed versatile is an attribute of made-to-order clothing and only one participant agreed that expensive/high in price is an attribute of made-to-order clothing. Table 1 presents slow fashion clothing

attributes and details how participants described each attribute in the context of made-to-order clothing.

Slow fashion clothing attributes	Slow fashion clothing attributes describing made-to-order clothing
High-quality	One item is made at a time by one person from high-quality raw materials.
Durable/long-lasting	Durable and long-lasting is the outcome of high-quality materials and attention to detail during the production process.
Versatile	Capsule wardrobes and collections are designed to work together.
Timeless/classic	Timeless and classic design ensure that items will be worn for a long time.
Expensive/high in price	Made-to-order should naturally be higher in price or the quality of the item and the working conditions of the people who make the garments will be compromised.
An investment piece	Buying made-to-order is an investment that pays off because the consumer gets a clothing item that lasts a lifetime due to its better quality.
High in value	The value of a make-to-order clothing item is better due to the unique consumer experience, high-quality materials and highly skilled seamstresses.
Unique	There is less that is produced and therefore, it is quite uncommon for a consumer to find the same clothing item. For example, it is quite uncommon for a made-to-order business to produce more than 20 pieces of the same item.
Sustainable/eco-friendly	Made-to-order is sustainable as there is no overproduction and nothing extra as everything is produced on demand, so businesses produce only what they sell.
Emotionally durable	Consumers are attached to the clothing item and have an emotional connection with the clothing item.
Diverse	Made-to-order businesses are able to offer more options in terms of variety and size and there is a diverse range of made-to-order businesses.
Good fit	Made-to-order can be made-to-measure and usually when a clothing item is higher in price, the fit is more considered and there is less room for imperfection.
Flatters individual identity/creativity/self-image	Consumers purchase made-to-order because the clothing is unique, and to be able to select clothing items that suit their lifestyle .

Table 1: Slow fashion clothing attributes describing made-to-order clothing

All participants agreed that long-term/mutually beneficial relationships is an attribute of made-to-order. 4/5 participants agreed that transparent, small-scale/small batches, craftsmanship/traditional production techniques/highly skilled labour, slow

production/made with care and precision and the customer is a part of the production process are attributes associated with the production of made-to-order clothing. 3/5 participants agreed that social responsibility/fair labour conditions and environmental responsibility are attributes of made-to-order. Interestingly, only one participant agreed that technology can be used to reduce waste and pollution and no participants fully agreed that local resources/local materials/local markets is an attribute of made-to-order clothing. Table 2 presents attributes associated with the production of slow fashion and indicates how participants described each slow fashion production attribute in the context of production of made-to-order clothing.

Slow fashion production attributes	Slow fashion production attributes describing the production of made-to-order
Transparent	Made-to-order businesses incorporate transparency as a part of the business model and show consumers the production process, who makes the garments and where the inspiration to the garments came from.
Small-scale/small batches	Some made-to-order businesses are partially small-scale small-batch and partially made-to-order while other made-to-order businesses produce individual unique pieces that will never be repeated.
Local resources/local materials/local markets	In terms of producing the garment, made-to-order businesses usually produce locally.
Social responsibility/fair labour conditions	Producing locally is a great way to ensure fair labour conditions.
Craftsmanship/traditional production techniques/highly skilled labour	Creating made-to-order clothing requires a lot of experience and through transparency, made-to-order businesses show the craftsmanship and production techniques.
Slow production/made with care and precision	Made-to-order is produced with more care and precision without rushing the production process to ensure good quality.
Environmental responsibility	As made-to-order businesses do not overproduce, there is no waste which alone is environmentally responsible.
Technology can be used to reduce waste and pollution	Some made-to-order businesses have developed 3D modelling to replace creating multiple samples and some businesses that produce made-to-measure use applications to take measurements.
The customer is a part of the production process	Made-to-order businesses involve customers as much as possible through transparency, especially if custom orders and made-to-measure is produced.
Long-term/mutually beneficial relationships	Made-to-order businesses develop long-term relationships with customers, suppliers and factories.

Table 2: Slow fashion production attributes describing the production of made-to-order

4.1.2 Made-to-order attributes

Five made-to-order attributes were developed to describe some qualities that are unique to made-to-order fashion. These five dimensions are called 1) made-to-order experience 2) willingness to create 3) clothing diversity 4) brand story and 5) consumer education. *Made-to-order experience* refers to the fact that consumers have to wait for the clothing item to arrive, and how made-to-order businesses offer consumers a unique customer experience that compensates for the increased wait time. *Willingness to create* refers to customers' openness to create items that match their personal taste and business willingness to accommodate consumers' needs. *Clothing diversity* refers to the fact that made-to-order businesses strive to create limited-edition clothing and experiment with different fabrics and production techniques to create unique clothing for consumers. *Brand story* refers to the fact that made-to-order brands are born because an individual is passionate about fashion and wants to start a label with as little cost as possible. *Consumer education* refers to the fact that made-to-order businesses communicate the advantages of sustainable fashion with their customers and followers on social media. These five attributes are aspects that made-to-order businesses can take advantage of to create an effective made-to-order strategy.

4.1.3 Made-to-order production process

There are four types of made-to-order businesses that differ slightly regarding their production processes. The four different made-to-order businesses are described in Figure 2. The four types of made-to-order businesses have many similarities but also some differences which make some types of made-to-order businesses more flexible than others. There is quite a diverse range of made-to-order, and not all made-to-order businesses fit these categories, or some businesses might belong to several categories at the same time. However, Figure 2 is to illustrate that not all made-to-order businesses are similar, and it is up to the strategy of the made-to-order business to choose how much flexibility is desired. These similarities and differences are discussed later in the Analysis section.

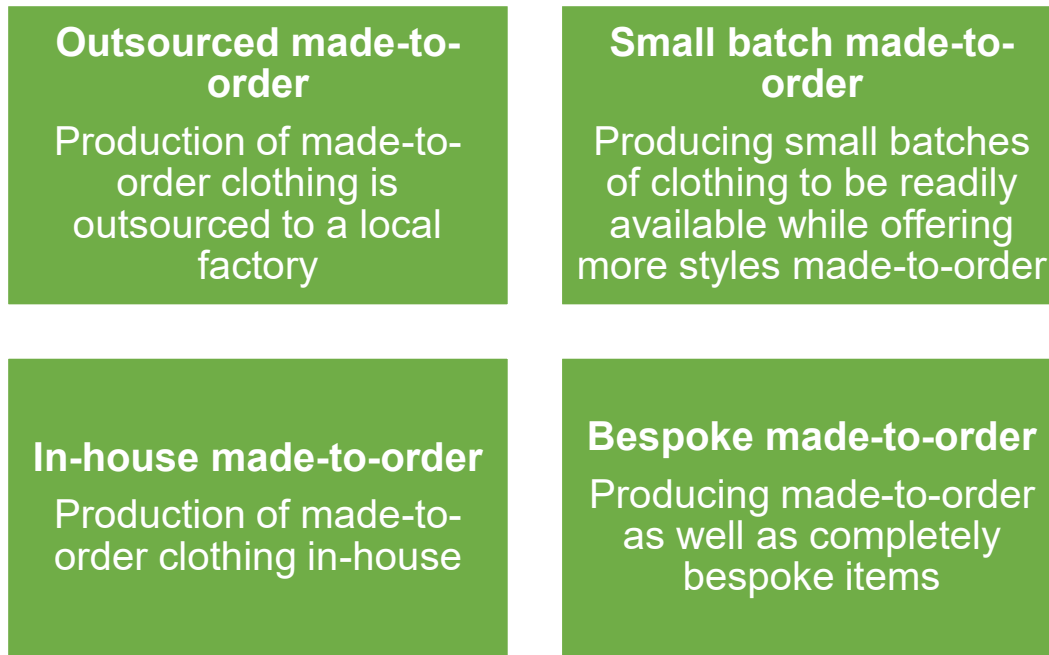


Figure 2: Four types of made-to-order businesses

4.1.4 Made-to-order consumer behaviour

The behaviour of a consumer who purchases made-to-order clothing is the fourth major theme. Consumer behaviour was shaped by the fact that made-to-order consumers do not make impulsive purchasing decisions, but rather take the time to reflect on what types of clothing items they actually wear and what they want out their clothing items. Therefore, the clothing items will be worn more often for many years. The respondents noted the trend of changing consumer behaviour and the current period of readjusting during which consumers look for more sustainable offerings and continue to seek sustainable offerings which bring new customers to make-to-order businesses.

4.2 Survey findings

33 respondents had purchased made-to-order clothing before, and 79 respondents had not purchased made-to-order clothing before. Figure 3 shows what types of made-to-order items the 33 respondents had purchased. The category “something else”

included hats, shoes and outfits for hobbies. 13 respondents indicated that the item was bought online while 18 respondents indicated that the item was bought locally either from a local tailor, a local clothing store or a family member had made the item. Figure 4 shows how respondents had heard about the made-to-order businesses. Social media platforms were Instagram and Facebook, and the “other” category included google searches, walking past a store and word-of-mouth communication.

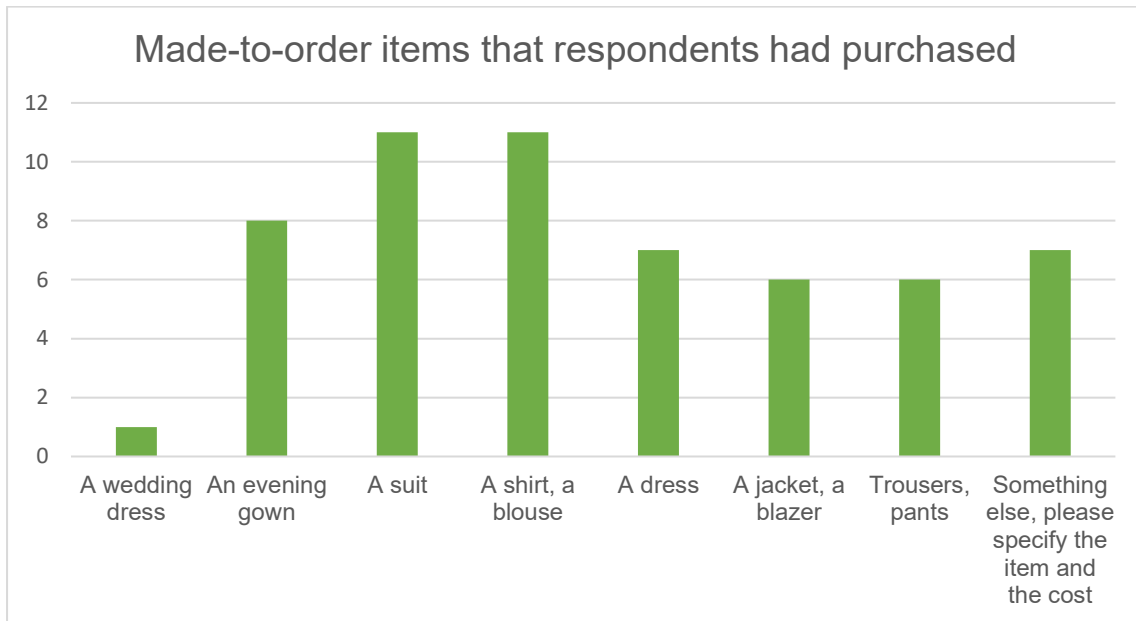


Figure 3: Types of made-to-order items purchased



Figure 4: How respondents had heard about the make-to-order business

An independent samples t-test was utilized to see if any differences exist between respondents who have and have not purchased made-to-order clothing before. First, the difference of the two groups were measured against the importance of slow fashion clothing attributes. The mean scores of both groups are illustrated in Figure 5. There was a significant difference between people who have purchased made-to-order clothing ($M=3,2424$, $SD=1,00095$) and people who have not ($M=3,6962$, $SD=1,00453$) regarding the product attribute sustainable/eco-friendly, $t(110)=-2,182$, $p=0,031$, with people who have never bought made-to-order clothing rating the attribute sustainable/eco-friendly higher. In other words, sustainability and eco-friendliness is more important to respondents who have never bought made-to-order clothing. This finding contradicts with the interview findings as the interviewees felt that consumers come to made-to-order businesses for sustainability. There was also a significant difference between respondents who have purchased made-to-order clothing ($M=4,9394$, $SD=0,24231$) and respondents who have not ($M=4,7595$, $SD=0,48609$) regarding the product attribute good fit, $t(110)=2,020$, $p=0,046$, with people who had purchased made-to-order clothing before rating the attribute higher. In other words, good fit is more important to respondents who have purchased made-to-order clothing before, possibly due to the fact that most made-to-order businesses offer clothing made according to measurements. All in all, as Figure 5 illustrates, the findings are quite similar between the groups who have and have not purchased made-to-order clothing before.

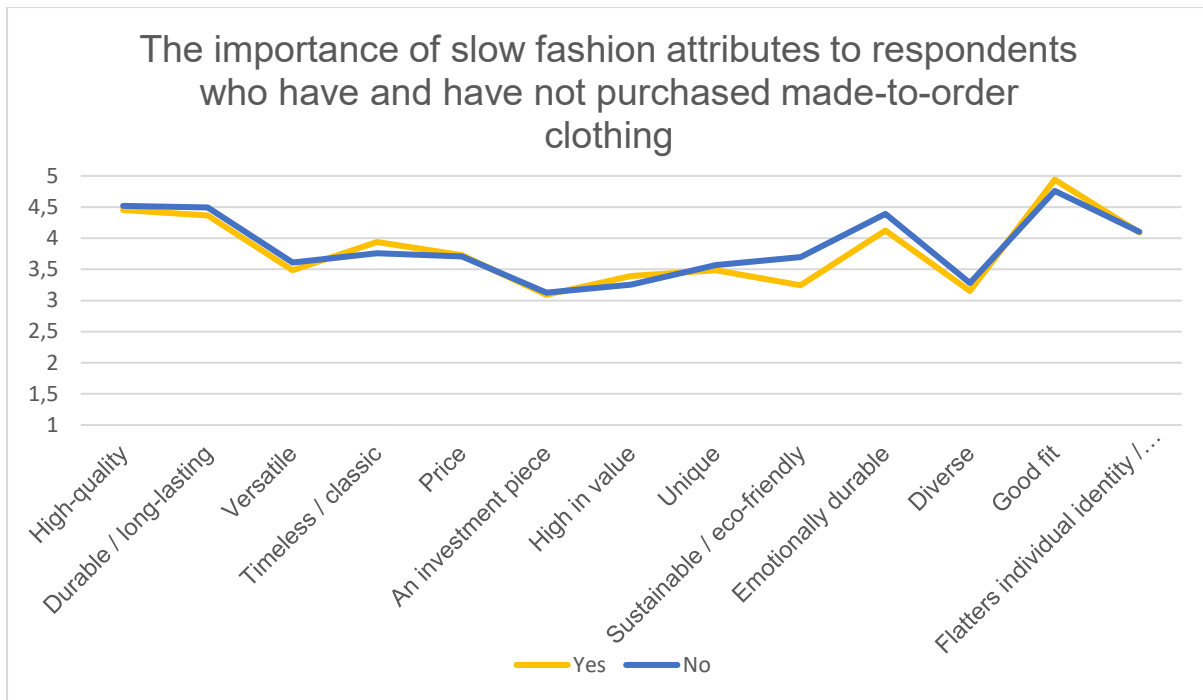


Figure 5: The importance of slow fashion attributes to respondents who have and have not purchased made-to-order clothing

Then, the difference between people who have and have not purchased made-to-order clothing before was measured against the importance of having a specific personalization/customization option available. The differences between the two groups are illustrated in Figure 6. There was a significant difference between respondents who have purchased made-to-order clothing ($M=4,2121$, $SD=0,92728$) and respondents who have not ($M=3,4937$, $SD=1,09630$) regarding the product attribute different fabric, $t(110)=3,301$, $p=0.001$, with people who have purchased made-to-order clothing before rating this product attribute higher. The same significant difference was seen when people who have and have not purchased made-to-order clothing before was measured against the willingness to pay more for certain customization/personalization options. There was a significant difference between people who have purchased made-to-order clothing ($M=3,8485$, $SD=0,61853$) and people who have not ($M=3,4051$, $SD=1,01929$) regarding the product attribute different fabric, $t(110)=2,323$, $p=0.022$, with people who have purchased made-to-order clothing before rating this product attribute higher. The differences in willingness to pay is illustrated in Figure 7. One participant in an individual in-depth interview described how customers are helped to select fabrics that suit their lifestyle, indicating

why respondents who have purchased made-to-order clothing before rated this product attribute higher.

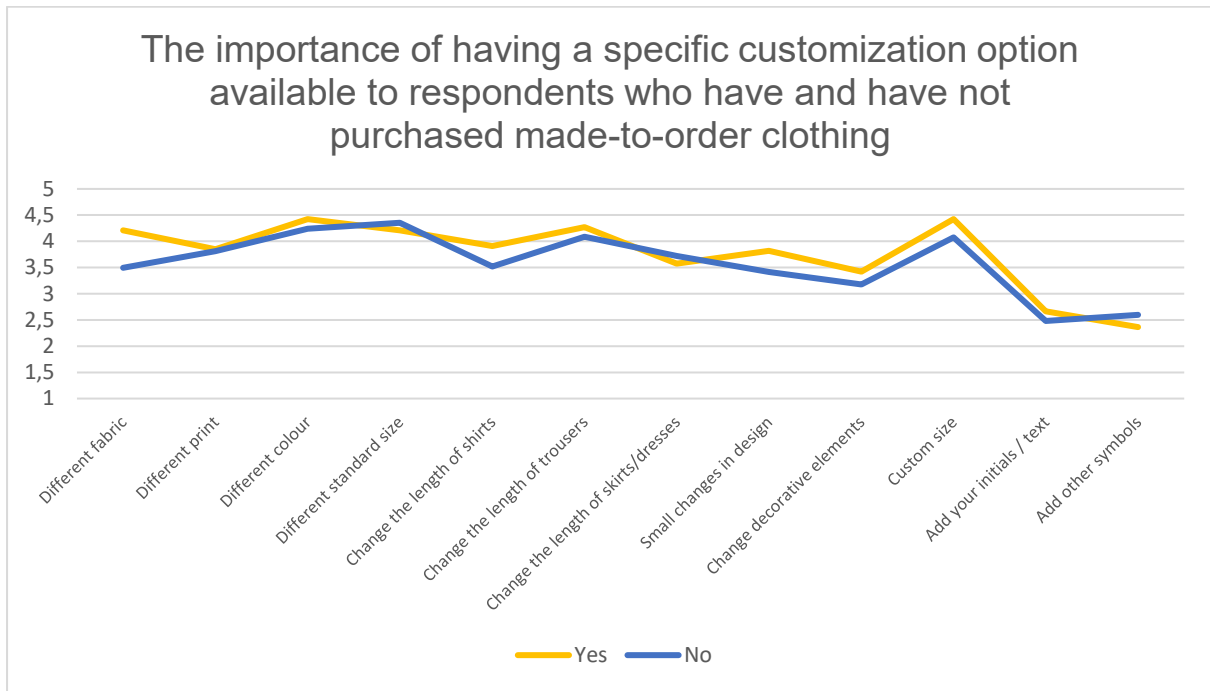


Figure 6: The importance of having a specific customization/personalization option available to respondents who have and have not purchased made-to-order clothing

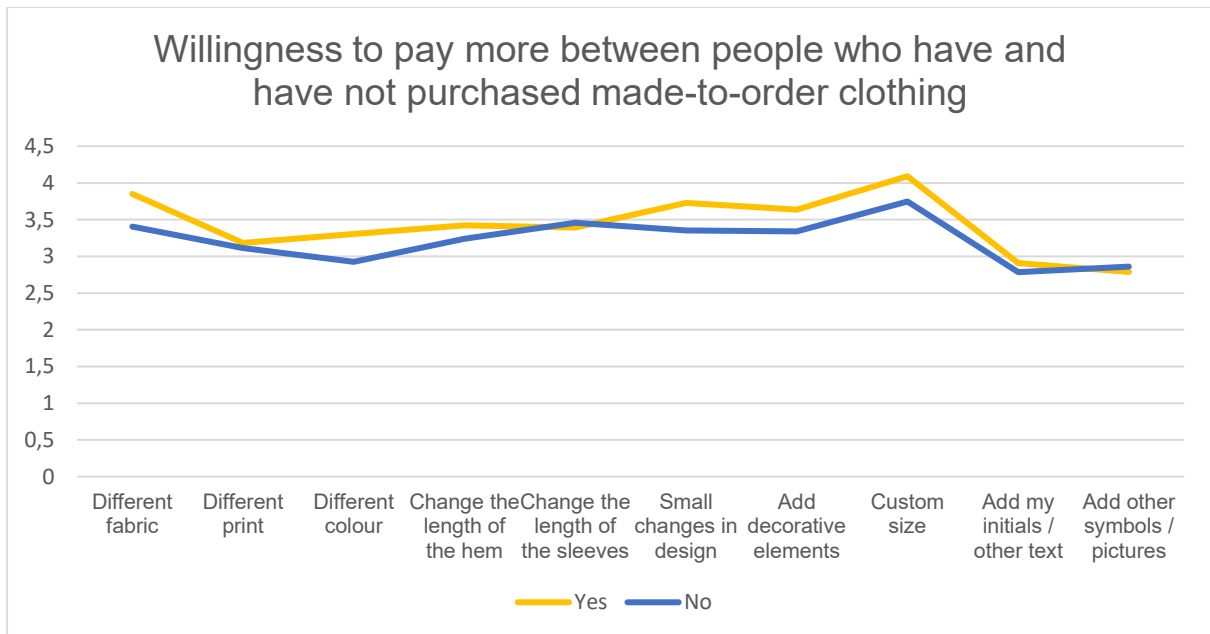


Figure 7: Willingness to pay between respondents who have and have not purchased made-to-order clothing.

Lastly, the difference between people who have and have not purchased made-to-order clothing was measured against how the certain factors would impact the likelihood of the respondent purchasing from a particular made-to-order brand. There was no significant difference between the two groups regarding the likelihood of purchasing.

To further examine the connection between slow fashion and made-to-order fashion, respondents were asked to rate the importance of certain slow fashion attributes in a make-to-order clothing item. The importance of slow fashion attributes is illustrated in Figure 8. Also, respondents were asked which slow fashion attributes they associate with the production of made-to-order clothing. The results are illustrated in Figure 9.

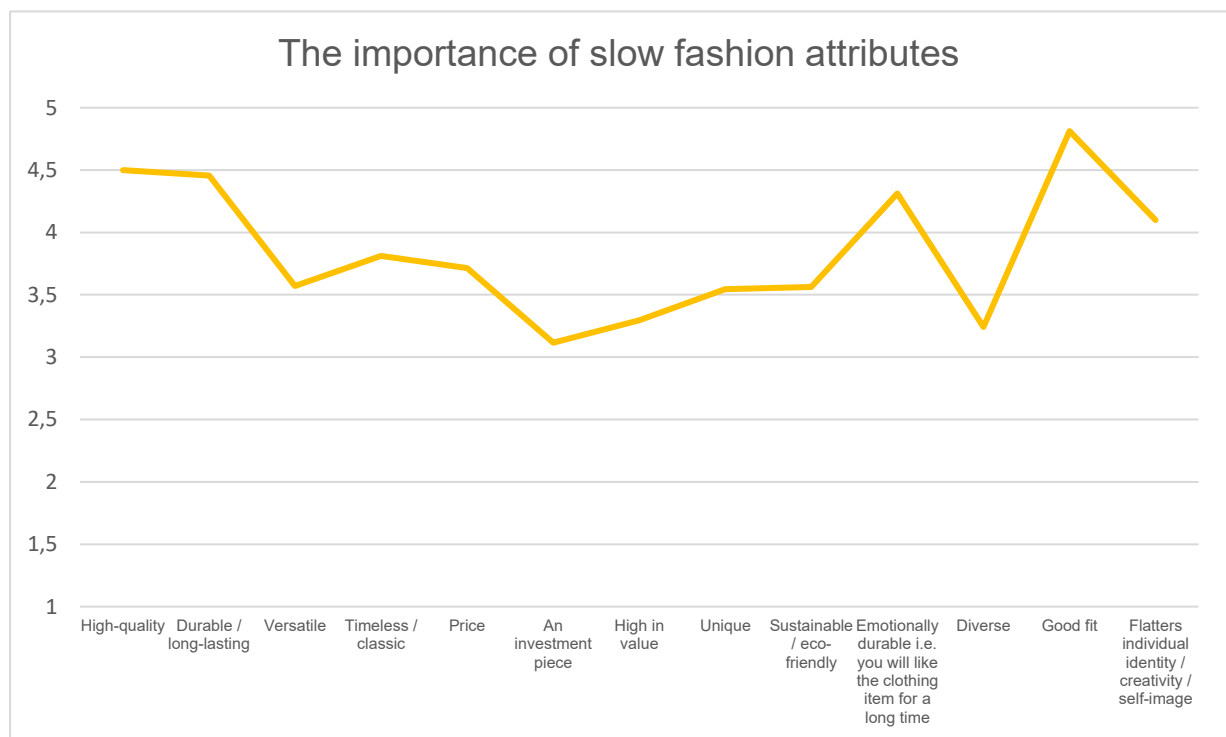


Figure 8: The importance of slow fashion attributes in a made-to-order clothing item

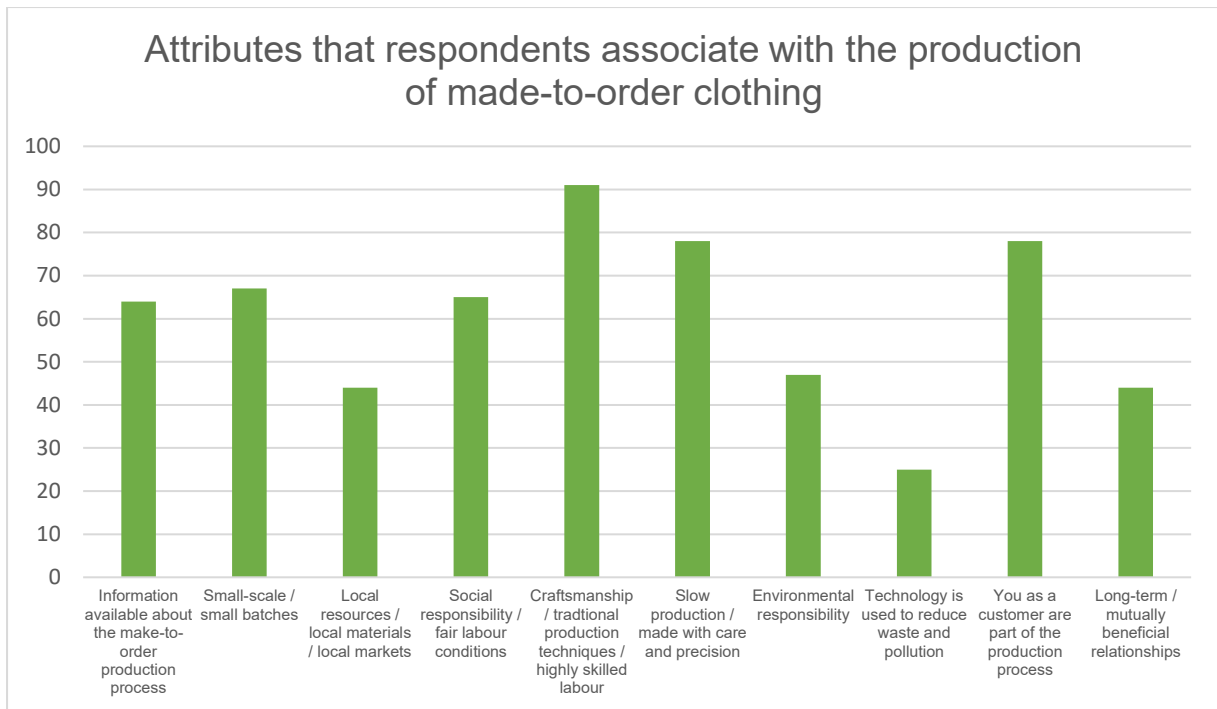


Figure 9: Slow fashion production attributes in the production of made-to-order clothing

To create an effective made-to-order strategy, determining which customization and personalization options consumers desire the most is essential. The importance of different customization options can be seen from Figure 10 where the black line represents the importance of the different customization options. To determine if it is also viable for the business to offer these different customization options, the willingness to pay for different customization options can be measured. Figure 10 illustrates the importance of different customization options against a line that measures the customers' willingness to pay. It can be seen that consumers would be willing to pay more for adding decorative elements, adding initials or other text and adding other symbols. Willingness to pay for different customization options can also be measured via paired samples t-test to essentially ask if consumers are actually willing to pay for having the feature. The results show that significant differences exist regarding customization options different print, different colour, change the length of the hem, custom size, add your initials and add other symbols. Regarding product attributes different print $t(111)=6,620$ $p=0,000$, different colour $t(111)=10,596$ $p=0,000$, change the length of the hem $t(111)=2,766$ $p=0,007$ and custom size $t(111)=3,197$ $p=0,002$, consumers rated the importance of the feature higher than willingness to pay for that feature. Therefore, consumers show that they are not willing to pay more for

those customization options. Regarding product attributes add your initials/text $t(111)=-2,723$ $p=0,008$ and add symbol/pictures $t(111)=-3,154$ $p=0,002$, consumers rated the willingness to pay higher than the importance of the product attribute. Therefore, consumers show willingness to pay more for those customization options.

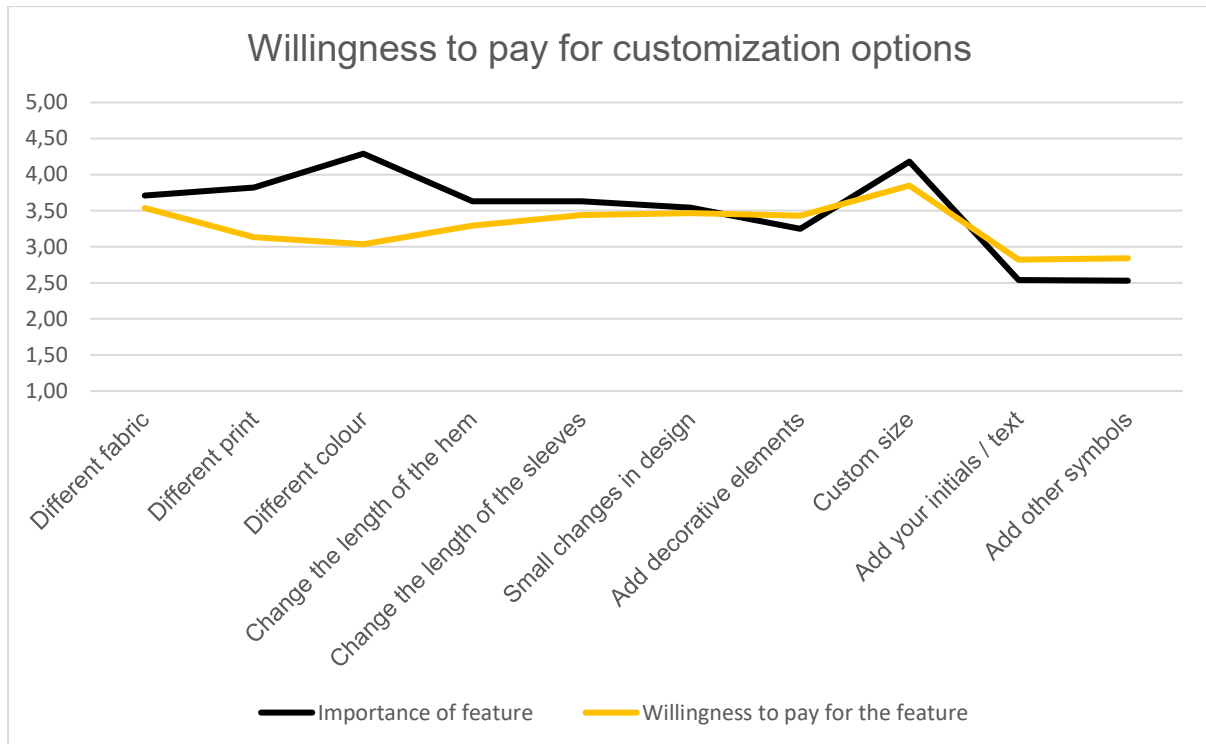


Figure 10: The importance of and willingness to pay for different customization options

Figure 11 illustrates what factors increase the likelihood of a respondent purchasing from a made-to-order brand. The factors that increase the likelihood of purchasing most are ability to see the final customized made-to-order item simulated on the screen, ability to enter your measurements and see the final customized clothing item simulated on the screen and receiving personalized customer service.



Figure 11: Likelihood of purchasing from a made-to-order business

Willingness to pay for a made-to-order clothing item was also measured against an item not made-to-order. Descriptive statistics showed that consumers were willing to pay on average 55,98€ for a made-to-order dress shirt while the minimum amount was 10€ and maximum was 200€. An assumption of sustainable materials and produced in fair labour conditions was added and consumers were willing to pay 72,23€ on average with a minimum of 10€ and a maximum of 250€. An item being made-to-order seems to increase willingness to pay, and willingness to pay seems to increase more when consumers assume sustainability and fair labour conditions. A paired samples t-test was utilized to analyse the difference between the item made-to-order and the item made-to-order from sustainable materials in fair labour conditions. The correlation of the items was 0.868, indicating that as willingness to pay increases, the willingness to pay from sustainable offerings increases as well. A significant difference between the items existed, $t(111)=-7,116$, $p=0,000$ ($M=-16,25000$, $SD=24,16628$), indicating that respondents were on average willing to pay 16,25€ more for an offering made from sustainable materials in fair labour conditions. Therefore, consumers were willing to pay significantly more for an item made from sustainable materials and produced in fair labour conditions.

To further examine willingness to pay, a new variable called "PriceDifferential" was created and an independent samples t-test was run to examine if people who have purchased made-to-order clothing before would be more willing to pay for sustainable offerings. On average, people who had bought made-to-order clothing before were willing to pay 20,61€ more for a clothing item made from sustainable materials in fair labour conditions while people who never have purchased made-to-order clothing before were willing to pay only 14,43€ more for the sustainable and fair labour conditions offering. This test was statistically not significant $t(110)=1,236$, $p=0,219$ but however, might still have implications for current made-to-order businesses regarding pricing strategies.

Willingness to wait for a made-to-order item was measured regarding two product categories: shirts and jeans. On average, a respondent was willing to wait 14 working days for a made-to-order shirt with a minimum of 5 working days and maximum of 20 working days while a respondent was willing to wait 15 working days for made-to-order jeans with a minimum of 5 working days and a maximum of 20 working days. A paired samples t-test was utilized to analyse the difference between willingness to wait for a made-to-order shirt versus made-to-order jeans. A significant difference between the two product categories existed, $t(111)=-3,255$, $p=0,002$ ($M=-0,58036$, $SD=1,88708$), indicating that respondents were willing to wait for the made-to-order jeans significantly longer than the made-to-order shirt. These results indicate that differences exist between product categories and willingness to wait.

Correlations were utilized to see if differences exist between age and willingness to pay and willingness to wait. In both cases, correlation coefficient was around zero and test statistics show that the relationship between the variables were not significant, indicating there is no relationship between age and willingness to pay or willingness to wait.

As one of the goals of this project is to develop an effective strategy for a make-to-order business offering clothing mainly for women, it becomes essential to utilize independent samples t-test to see if any significant differences exist between men (sample size 39) and women (sample size 72). First, differences between men and women were tested against the importance of slow fashion attributes. There was a

significant difference between men ($M=3,2321$, $SD=1,09901$) and women ($M=3,7222$, $SD=0,95272$) regarding the product attribute sustainable/eco-friendly, $t(109)=2,200$, $p=0,030$, with women rating this product attribute higher than men. The differences between male and female perceptions about slow fashion can be seen from Figure 12.

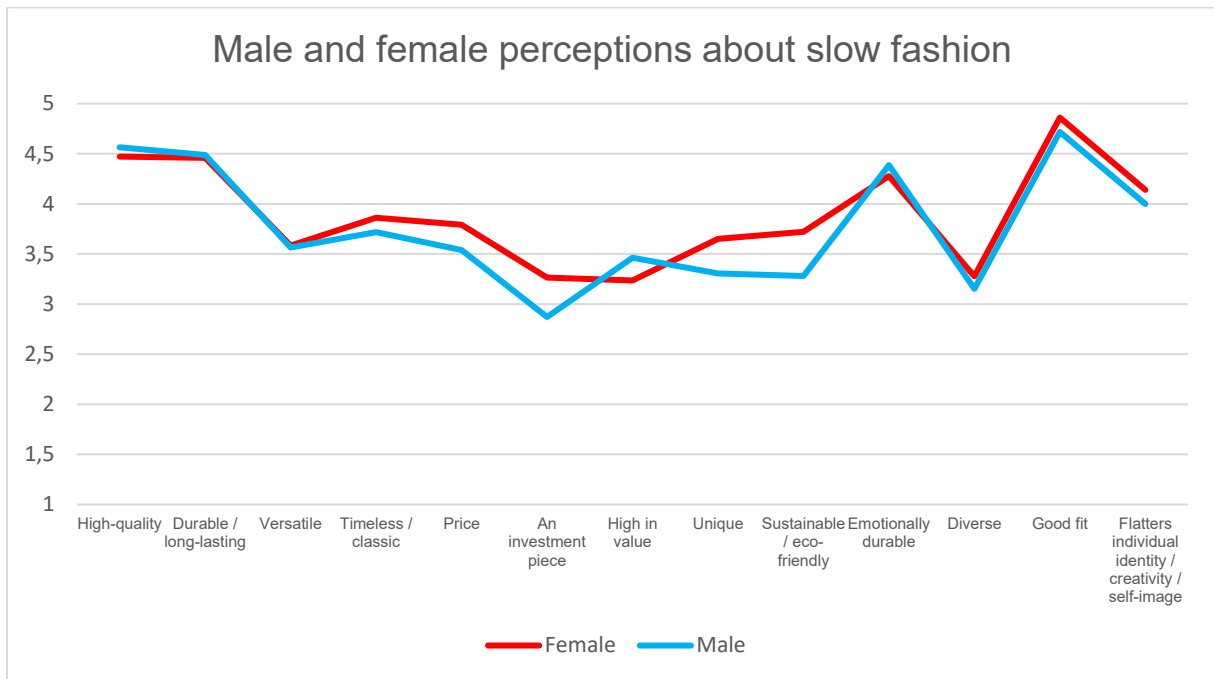


Figure 12: Male and female perceptions about slow fashion

Then, the differences between men and women were measured against the importance of customization/personalization options. There was a significant difference between men ($M=4,0769$, $SD=0,92863$) and women ($M=4,4444$, $SD=0,88634$) regarding the product attribute different standard size, $t(109)=2,051$, $p=0,043$, with women rating this product attribute higher than men. Also, there was a significant difference between men ($M=2,9744$, $SD=1,20279$) and women ($M=4,0417$, $SD=0,87914$) regarding the product attribute change the length of skirts/dresses, $t(109)=5,347$, $p=0,000$, with women rating this product attribute higher. Therefore, women think different standard size and the ability to change the length of skirts/dresses is more important than men. However, most men are probably not interested in the customization option change the length of skirts/dresses. The differences between male and female perceptions regarding the different customization options can be seen in Figure 13.

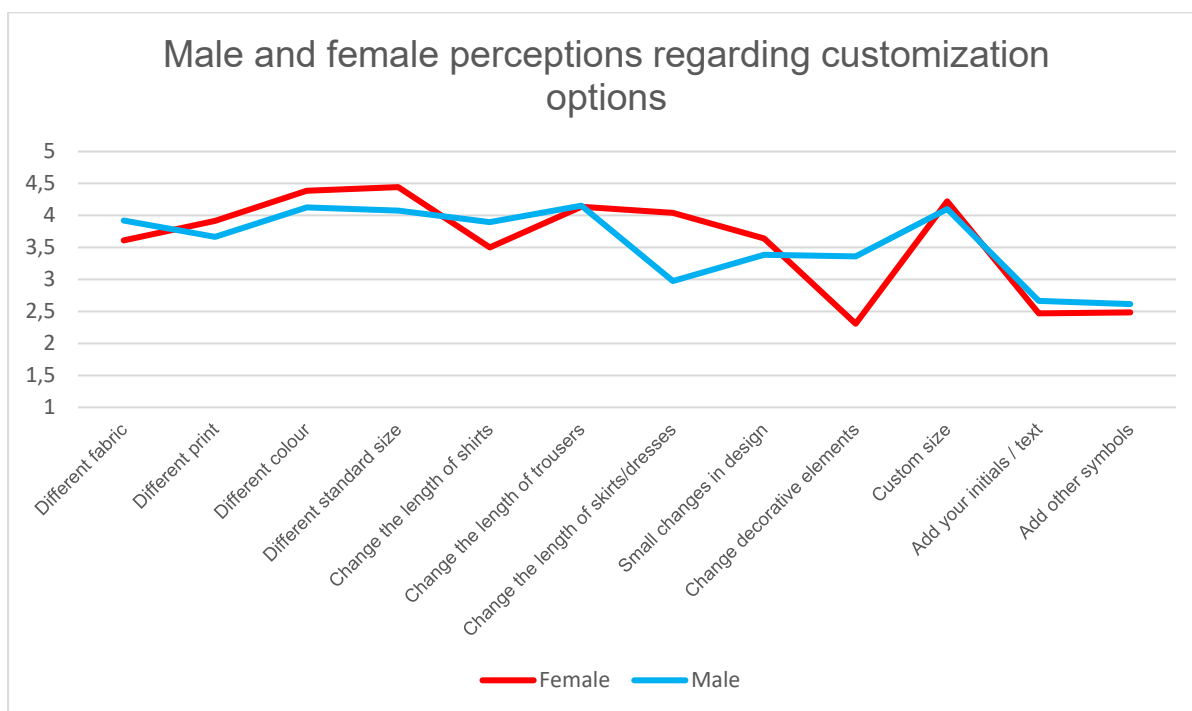


Figure 13: Male and female perceptions regarding customization options

Then, the differences between men and women were measured against the factors that affect the likelihood of a person purchasing from a particular brand. There was a significant difference between men ($M=3,3846$, $SD=1,18356$) and women ($M=3,9167$, $SD=0,88413$) regarding the product attribute social responsibility information $t(109)=2,679$, $p=0,009$, with women rating this attribute higher. Also, there was another significant difference between men ($M=3,4103$, $SD=1,01872$) and women ($M=3,9861$, $SD=0,94187$) regarding the product attribute sustainability information, $t(109)=2,988$, $p=0,003$ with women rating this product attribute higher. Therefore, women are significantly more likely to purchase from a particular brand than men if social responsibility and sustainability information is provided.

Lastly, the differences between men and women were measured against the statements measuring willingness to pay more for certain product attributes. However, no significant differences existed between men and women regarding the willingness to pay more for certain personalization/customization options.

5. ANALYSIS

5.1 Slow fashion as a strategy

Watson and Yan (2013) suggest that slow fashion is identified by the type of clothing, not the type of business model or store. There is an evident connection between slow fashion clothing attributes and made-to-order clothing attributes as well as the attributes associated with the production of slow fashion and the production of made-to-order. It can be concluded that made-to-order is a form of slow fashion. Slow fashion and sustainable fashion businesses have traditionally been threatened by the gap between consumers' attitudes and actual purchasing behaviour regarding sustainable offerings. Jung and Jin (2014) indicate that this gap stems from limited self-expression possibilities of sustainable fashion. According to interview participants, made-to-order businesses, however, have not experienced this threat, and see sustainability only as an opportunity. Interviewees attribute the opportunities to stem from being able to offer personal service, unique and customized clothing. One interview participant also noted that consumers come to made-to-order businesses for sustainability and therefore, sustainability poses only opportunities. It was also discussed by interview participants that consumer mentalities are currently re-adjusting and while some consumers immediately search for sustainable brands, it takes a while for others to learn about sustainable fashion, but ultimately, made-to-order businesses expect to see increased demand in the future.

Based on the connection between slow fashion and made-to-order clothing, it is justified that made-to-order businesses claim to practice slow fashion. When the importance of slow fashion attributes was assessed, all attributes received an average score of higher than three, indicating that the importance of these attributes vary from neutral to extremely important. This further reinforces the connection between slow fashion clothing attributes and made-to-order clothing. The slow fashion attributes that received the highest scores were good fit, high-quality, durable/long-lasting, emotionally durable, and flatters individual identity/creativity/self-image, all receiving an average score higher than 4, indicating that the scores of these attributes varied between important and extremely important. These attributes indicate customer

expectations towards the clothing item, indicating that made-to-order businesses should ensure that their clothing is high in quality, durable and long-lasting and fits well.

In terms of the attributes associated with the production of slow fashion, consumers associated craftsmanship/traditional production techniques/highly skilled labour, slow production/made with care and precision and the customer is a part of the production process with the production of made-to-order clothing. Interview participants claimed that made-to-order businesses practice emphasizing how skilled seamstresses are through transparency, and the customer is obviously a part of the production process when consumer wishes, and measurements are taken into consideration. Interestingly, the attribute technology can be used to reduce waste and pollution was the attribute associated least with the production of made-to-order clothing. Coinciding with the results received from the individual in-depth interviews, adoption of different technologies is still slow in the area of made-to-order, possibly due to the businesses being small in size and not having enough capital to invest in the latest technologies.

5.2 Unique customer experience

To compensate for the increased wait time during the production of the clothing item, made to order businesses have created a unique consumer experience and this is referred as *made-to-order experience*. The key element in creating a valuable strategic made-to-order experience is transparency. Through transparency, consumers are involved in the production process by sending them videos and pictures of their garment being made which makes the consumer enjoy waiting. Made-to-order add to this special experience by ensuring that the clothing item arrived looking well-packed with a handwritten note. As made-to-order businesses are not able to compete with large fashion companies on price or wait time, made-to-order businesses should focus on creating as special customer experience as possible. As each client and garment is given complete attention, consumers are able to build a special relationship with the garment before the finished product even arrives, and many made-to-order businesses enjoy repeat purchases from customers. Transparency even extends to

including information about how the made-to-order business arrived at the selling price of the item. For example, a made-to-order business MaisonCléo introduced a public receipt for each item, detailing exactly why each garment is priced the way it is (Murray, 2020). Stemming from the unique customer experience, the made-to-order attribute *willingness to create* refers to customers being open to design their own clothes and invest their time and availability to get a garment made for them. Made-to-order businesses are also willing to accommodate customers' needs and requirements and are flexible and appreciate every customer.

Made-to-order businesses have *brand stories* that are unique reasons why the business was established, and made-to-order businesses should enhance the brand story and brand image as a differentiation strategy. For example, the passion and love for creating unique clothes is what drives this business model, and made-to-order businesses should adopt differentiation as a strategy and decide what makes the business stand out in the field of made-to-order fashion and sustainable fashion. The differentiation strategy is in line with the *clothing diversity* attribute which means that made-to-order businesses produce unique clothing items that are in the best-case size inclusive as well. Made-to-order brands tend to have strong aesthetic that should be emphasised. For example, some differentiation strategies include collaborating with artists, creating colourful and extravagant clothes, creating timeless and minimalist pieces or creating trendy clothing. Lastly, made-to-order brands are active on social media and practice *consumer education* about sustainable fashion, production processes and seamstresses' skills which is traditionally hidden in the fashion industry. Again, transparency is used to educate consumers about sustainable fashion to increase demand in the future.

5.3 Choosing the right production process

In terms of raw materials, made-to-order businesses tend to source small quantities of fabrics. To encourage sustainability, many made-to-order businesses use deadstock fabrics that are leftover fabrics from other fashion companies that can be bought in limited quantities. Other ways to ensure sustainability are to use fabrics that

are certified by the Global Organic Textile Standard (GOTS) or to use fabrics produced from renewable resources such as TENCEL produced from wood (TENCEL, 2021). If fabrics are sourced in limited quantities, such as deadstock fabrics, made-to-order businesses cannot repeat the styles once the fabric runs out, making the clothing items more unique. However, made-to-order businesses that source their fabrics from mills are able to be more responsive to demand due to the fact that fabric can be ordered more if demand exceeds forecasts. One participant described that fabrics sourced from mills can be put on hold and therefore, more can be ordered if needed. On the other hand, if demand is less than forecasted and there are leftover fabrics, made-to-order businesses create new styles in those fabrics to ensure that no waste is produced. Even though made-to-order businesses do not overproduce, investment must be made to raw materials and these practices ensure that no wastage will be created, and all fabrics will be used.

According to De Cleyre (2019) made-to-order is clothing with pre-determined modifications available. However, in reality, there are many different types of made-to-order businesses. In terms of the actual production of the garment, the four types of made-to-order, as shown in Figure 2, show most differences. *Outsourced made-to-order* produce garments in factories that are not owned by the made-to-order company. Therefore, the business model can become quite inflexible as for example, factories might not produce made-to-measure and not accept any customization. Also, factories have to produce all orders at the same time which means that the made-to-order business can open online shop for orders less frequently and waiting time for customer can become quite long. To have more flexibility, *small batch made-to-order* businesses produce small batches of items to be readily available, usually in an outsourced factory, but offer more styles made-to-order to satisfy customer needs. However, when this model is utilized, it is easier to control prices as the price is lower when more items are produced at the same time, while still allowing made-to-order items to satisfy customer needs. *In-house made-to-order* businesses produce clothing items in a small atelier or front room and are able to quite easily offer small customization and modification for clothing items such as custom sizes or small changes in design. Also, these businesses are usually able to accept orders as long as there are enough raw materials left. *Bespoke made-to-order* is able to offer the most flexibility as these businesses offer both pre-designed collections but are also

able to create something absolutely bespoke if the customer desires. As there are many different types of made-to-order businesses, one interview participant described consumer confusion regarding why some specifications are not offered, and to avoid any consumer confusion it should be clearly stated what types of specifications the particular made-to-order business offers and why.

5.4 Pricing strategies

Pricing strategies and market segment for made-to-order businesses can be defined based on the data received from the interviews and the survey. Made-to-order businesses usually compete in the middle market segment with prices around 250 euros or in the luxury market where prices are significantly higher. Made-to-order businesses competing in the middle segment face the issue of some consumers trying to challenge the price point and compare the business model to fast fashion. The challenging of the price point seems to stem from consumers being used to fast fashion prices for a long time and one interviewee added that the price point for made-to-order cannot be lower or otherwise the quality and working conditions of the people who make the garments are compromised. In the luxury market, the price of made-to-order is not an issue due to the fact that the consumer who would not buy made-to-order because it is expensive would also not purchase luxury clothing. In terms of adjusting the price within those market segments, if an item is made from sustainable materials and in fair labour conditions, consumers demonstrate willingness to pay more, on average 16,25 € more. Consumers' willingness to wait was also measured to see what wait times made-to-order businesses should aim for. On average, a consumer was willing to wait for 14 working days for a made-to-order shirt and 15 working days for made-to-order jeans.

The made-to-order business model works for start-up businesses. For example, interview participants described how they could not afford to start a label with a huge upfront investment, and therefore, decided to start a made-to-order business. So, made-to-order businesses experience less risk because they only produce what is sold. In terms of the margin, made-to-order businesses are able to keep their margins

lower than fast fashion businesses because made-to-order businesses know they won't have to mark garments down. Fast fashion businesses know that they are going to have too many garments and have to mark them down which has to be built into the margin. For example, one made-to-order business stated that they are aiming for a margin of 50% because they know the garments are going to sell for the price that the garment is.

5.5 Customization as a strategy

The importance of having specific customization/personalization options is an essential part of an effective made-to-order strategy. The options different colour, different standard size, change the length of trousers and custom size were the most important customization/personalization options, all having an average score between important and extremely important. Ranging between neutral to important were customization options different fabric, different print, change the length of shirts, change the lengths of skirts/dresses, small changes in design and change decorative elements. Add your initials/text and add other symbols ranged between unimportant and neutral. As made-to-order businesses might not necessarily have the budget to offer bespoke service, offering the customization options most important to consumers becomes viable. It was also measured if consumers would be willing to actually pay more for having these customization/personalization options. Consumers were willing to pay significantly less for different print, different colour, change the length of the hem and custom size. Different print and different colour can be explained by the fact that most clothing businesses offer those options and therefore, consumers do not demonstrate willingness to pay more. Custom size and change the length of the hem are interesting as these factors cannot be explained by the fact that most clothing businesses offer these services. However, most made-to-order businesses offer custom size and small adjustments to design such as change the length of the hem when purchasing from that particular brand, indicating why willingness to pay more for those features is low.

5.6 Online presence and technologies

According to the survey, people who had bought made-to-order clothing before, had bought those items both online and from a physical boutique. Therefore, consumers are already demonstrating willingness to purchase made-to-order clothing online despite the threats, that one interviewee identified, of not being able to try the garment on and not being able to return it. However, even though most made-to-order businesses do not take advantage of 3D technologies, consumers were more likely to purchase a made-to-order item if they had either the ability to see the final customized clothing item simulated on the screen or ability to enter their measurements and see the final customized clothing item simulated on the screen on their body shape. This indicates that investing into a 3D modelling technology could be beneficial for made-to-order businesses. Made-to-order businesses do not necessarily have to develop a 3D technology but purchasing this service from another provider could be beneficial. Utilizing a 3D technology could increase purchases as customers can “try the garment on” by seeing it on the screen on their body and seeing how it fits reduces the doubts about not being able to return the garment.

Consumers who had previously purchased made-to-order clothing items were asked to indicate where they had heard about the made-to-order business. As most consumers had heard about made-to-order businesses through family and friends or through a website, this has some implications for a suitable advertising strategy for a made-to-order business. Made-to-order businesses could utilize a word-of-mouth advertising strategy, where people who have purchased from a particular brand share information about it to family and friends. This strategy would coincide with the strategy of creating a special customer experience, as satisfied consumers could be more likely to share about their positive purchasing experience. Additionally, it is beneficial for a made-to-order business to have a website where consumers can locate information about the brand. As one interviewee stated, most made-to-order brands are prevalent in social media, especially Instagram, and share transparent information there about their production process, sustainability in the fashion industry and social responsibility information.

5.7 Strategies for targeting women

As one of the goals of this project is to develop an effective strategy for made-to-order businesses that target women as their customers, the differences between men and women were measured. Women rated the slow fashion attribute sustainable/eco-friendly to be more important than men. Women were also more likely to purchase than men if social responsibility and sustainability information was offered. Therefore, made-to-order businesses targeting women should emphasize sustainability and fair labour conditions.

6. DISCUSSION

It was established that made-to-order is a form of slow fashion. However, on some clothing attributes interview participants did not agree as much as others. Many interviewees noted that the clothing attributes and attributes associated with production depend on what the brand is, what the garment is, what the design and design aesthetic of the brand is. Clothing attributes versatile and expensive/high in price were the attributes that received the most variability. In terms of versatility, it depended on what the garment was, what the brand is and what the design aesthetic of the brand was. This can be attributed to the fact that many made-to-order businesses design items such as wedding dresses which are not meant to be worn many times with different outfits. In terms of expensive/high in price attribute, interview participants felt that made-to-order is higher in price but not expensive because when the price is related to what you are getting, the price is not huge, and interviewees hoped that consumers would see the value in made-to-order. The attributes associated with the production of slow fashion also showed some variability. In terms of local resources/local materials and local markets, made-to-order businesses usually produce the actual garment locally, but fabrics are sourced from abroad and markets are international. For example, many interview participants sourced fabrics from Europe either from Italy or France to ensure high quality and because fabrics can be bought in lower quantities from these locations. Also, made-to-order have international markets due to the fact that made-to-order is a niche. In terms of the attribute

technology can be used to reduce waste and pollution, many interviewees stated that their business does not use technology in any specific way. However, some interview participants were experimenting with 3D modelling and taking clients' measurements via mobile application, indicating that there are technologies available for made-to-order businesses.

Survey respondents who had purchased and who had not purchased made-to-order clothing before were compared. Interestingly, respondents who had not purchased made-to-order clothing before rated the product attribute sustainable/eco-friendly higher. One interview participant believed that as made-to-order clothing is high in quality and lasts longer and customers wear these clothing items often and for a long time, it is in itself a sustainable and eco-friendly practice. Therefore, the attribute sustainable/eco-friendly might not be as important to respondents who had purchased made-to-order clothing before.

Consumers were asked which customization options were most important to them. The least important customization options were adding your initials and add other symbols. Interestingly, however, when willingness to pay for different customization options was measured, consumers rated the willingness to pay higher than the importance of that feature, as seen in Figure 10. These results are conflicting. This could be attributed to the fact that consumers would be willing to pay extra for having those features if needed, even though they are not seen as important.

Sustainability in made-to-order can be seen as a complicated issue. The main reason why made-to-order businesses are seen as sustainable, according to participants, is that there are fewer garments being made, because everything is created on demand, and when garment prices are higher, made-to-order businesses discourage overconsumption and encourage consumers to wear garments often and for a long time. One participant also believed that the only way to make sustainability a major focus for consumers is if fashion brands themselves move towards sustainability and therefore, force the customer to pay more. In terms of raw materials and sustainability, some participants were convinced that sourcing deadstock fabrics is sustainable because no new fashion waste will be added to the system. However, some participants saw the use of deadstock fabrics to be not sustainable as the fabrics

cannot be traced so it is very difficult to know where the fabrics came from and even though the fabric is deadstock, it might still be polyester that emits microplastics into the environment. Another example of confusing sustainability is in terms of cutting the fabric. For example, if five pieces of clothing can be cut at a time, there might be less waste than cutting one item at a time due to oddly shaped pattern pieces that could create a lot of fabric wastage. These examples illustrate well how many different variables sustainability has, and participants themselves admitted being confused about all the aspects of sustainability despite having worked in the fashion industry for many years.

Social responsibility in made-to-order can be seen also as a complicated issue. For example, one participant raised the issue of producing in a factory versus producing the garment yourself. In other words, the participant compared outsourced made-to-order to in-house made-to-order. When a make-to-order business produces in a factory, seamstresses have to be paid by the hour. However, when the founder of the made-to-order business produces the garments themselves in-house, the production is not regulated.

The Literature Review discussion started with the negative aspects of fast fashion. Even though all participants run made-to-order businesses due to being able to be sustainable and being able to produce in fair labour conditions, fast fashion was not seen as a bad thing necessarily. For example, fast fashion businesses are able to use technologies to place pattern pieces more efficiently, and the scale received in China could be more detailed and obviously fast fashion prices are much lower due to the scale. Fast fashion businesses are also able to optimize processes to reduce the waiting time. However, as already discussed in the Literature Review, the negative sides of fast fashion regarding sustainability and labour conditions outweigh the benefits of fast fashion, and therefore, made-to-order businesses want to address these issues by creating new business practices that foster sustainability.

The main objective of this study was to create an effective strategy to an online made-to-order business that practices slow fashion and targets women mainly as customers. This study addresses building an online presence through a website and social media channels, mainly Instagram. This study also connected slow fashion to made-to-order

attributes and addressed their importance in the eyes of consumers. The differences between men and women were assessed and it was stated that women value sustainability and social responsibility more than men. Additional objectives of this study were 1) to reveal customer segments 2) to define what unique value made-to-order businesses bring to customers and 3) to identify the core resources and capabilities that made-to-order businesses utilize. The customer segments identified for made-to-order businesses were to compete either in the middle market segment or in the luxury market. The unique value that made-to-order businesses bring to consumers is to be able to get a unique clothing item made especially for you as a consumer. Also, a mixture of transparent business practices, a unique customer experience, sustainability and social responsibility adds to the value of made-to-order. The core resources and capabilities that made-to-order businesses utilize is the capability to design unique pieces that customers desire, and these pieces are created from high-quality materials by highly skilled seamstresses.

7. CONCLUSIONS

7.1 Main findings

This study identified four major themes from the individual in-depth interviews. First, a relationship between slow fashion and made-to-order fashion was found. Second, five made-to-order attributes that describe the unique aspects of made-to-order were 1) made-to-order experience 2) willingness to create 3) clothing diversity 4) brand story and 5) consumer education. Third, four different made-to-order production processes were identified, and their similarities and differences were discussed. Fourth, the consumer behaviour of a consumer who purchases made-to-order was described. The survey identified the most important slow fashion attributes regarding make-to-order fashion which were good fit, high-quality and durable/long-lasting. The most important customization and personalization options were different standard size, different colour, custom size and change the length of trousers. The factors that increased the likelihood of purchasing emphasized the importance of adopting various technologies and were ability to see the final customized clothing item simulated on the screen and

ability to enter your measurements and see the final customized clothing item simulated on the screen on your body shape. It was also found that consumers are willing to pay more for made-to-order items, and willingness to pay more increases if sustainability and social responsibility are included. Consumers also demonstrate willingness to wait longer for a made-to-order product to arrive.

The results from the interviews and from the survey were combined in the analysis section and different aspects of made-to-order strategy was identified. The aspects of a made-to-order strategy included consideration to slow fashion, creating a unique customer experience, choosing the right production process regarding desired flexibility, pricing strategies, customization strategies and using online presence and technology strategically.

7.2 Implications for international business

It was found in this study that while made-to-order businesses produce locally, raw materials are sourced internationally to get the best materials, and as made-to-order businesses operate online, many offer international delivery and therefore, sell their products to consumers across the world. Also, as one interview participant stated, made-to-order businesses have identified a niche that desires customization, sustainability and social responsibility, made-to-order businesses tend to sell internationally to gain more customers. As consumers all around the world become more and more aware of sustainability in the fashion industry, consumers search for information regarding sustainable fashion. As customization is an added bonus for consumers who choose a made-to-order business for sustainability, made-to-order businesses can create new standards for the fashion industry, where fast fashion players have to respond to consumers demanding sustainability, social responsibility and customization according to each consumer's wishes. To conclude, the made-to-order segment of the fashion industry competes internationally by selling to customers all around the world.

7.3 Suggestions for further research

Due to this paper being an exploratory study, there are many suggestions for further research. As the results of this research can be best applied to made-to-order companies operating in developed Western countries and Generation Z as a larger consumer population, it is suggested that further research adds to the understanding of made-to-order in other countries with different cultures and in different age groups to gain a better understanding of made-to-order as a phenomenon. Also, every aspect of strategy explored in this paper such as pricing, customization, the choice of production process and marketing can be chosen for a topic in further research to gain a better understanding of each strategy regarding made-to-order. The opportunities of different technologies were discussed, and further research into different 3D technologies could be conducted to see how made-to-order businesses can take advantage of the technologies and how does the use of technology affect consumer perceptions about made-to-order businesses. For example, as made-to-order is associated with traditional production techniques, the use of technology might cause some shifts in consumer perceptions. Also, further research could be conducted based on behavioural consumer characteristics and made-to-order consumer behaviour. As sustainability was seen as a complicated issue with many different variables affecting it, further research can also explore sustainability in made-to-order.

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APPENDICES

Appendix 1. Individual in-depth interview questions

Question 1: Please read the attributes presented on the screen. Which of these attributes would you use to describe make-to-order clothing? Why and why not?

- High-quality
- Durable / long-lasting
- Versatile
- Timeless / classic
- Expensive / high in price
- An investment piece
- High in value
- Unique
- Sustainable / eco-friendly
- Emotionally durable
- Diverse
- Good fit
- Flatters individual identity / creativity / self-image

Question 2: Please read the attributes presented on the screen. Which of these attributes would you use to describe the production of make-to-order clothing? Why and why not?

- Transparent
- Small-scale / small batches
- Local resources / local materials / local markets
- Social responsibility / fair labour conditions
- Craftsmanship / traditional production techniques / highly skilled labour
- Slow production / made with care and precision
- Environmental responsibility
- Technology can be used to reduce waste and pollution

- The customer is a part of the production process
- Long-term / mutually beneficial relationships

Question 3: There is a gap between the attitudes of consumers and actual purchasing behaviours regarding sustainable clothing. This means that consumers say they are interested in purchasing sustainable clothing, but this interest does not translate to actual purchasing behaviour. As many make-to-order businesses claim to offer sustainable clothing, do you think this is a threat to make-to-order businesses? Why and why not?

Question 4: Could you describe your make-to-order business? What make-to-order products do you offer and why?

Question 5: Why did you establish a make-to-order business? Have you been satisfied with the make-to-order business model? Why and why not?

Question 6: Please read the variables presented on the screen. How does your make-to-order business use these variables to add value into the make-to-order products?

- Personalization / customization
- Garment design
- Wait time
- Price
- Customer experience
- Technology
- Transparency
- Social responsibility
- Sustainability

Question 7: What in your make-to-order products attracts customers to purchase?

Question 8: Make-to-order is usually considered to be a sustainable business model. What factors make the business model sustainable?

Question 9: What do you think customers expect or assume from make-to-order clothing?

Question 10: Why would someone not purchase make-to-order clothing?

Appendix 2: Survey questions

A make-to-order clothing item can be customized and personalized according to predetermined options for you to choose from. For example, wedding dresses, evening gowns, men's suits, and shirts are common items that can be made-to-order.

1. Have you ever bought make-to-order clothing item(s)? *

Yes

No

If option "Yes" is selected, show questions: Where did you buy the make-to-order clothing item(s) from? AND How did you hear about the make-to-order business that you bought the clothing item(s) from? Please check all that apply. AND What type of make-to-order clothing item(s) have you purchased? Please check all that apply and indicate the approximate cost of the item(s) in your currency?

If option "No" is selected, jump to question: A make-to-order clothing item can be customized and personalized according to predetermined options for you to choose from. The production of a make-to-order clothing item will be started after the customer has ordered the product.

2. What type of make-to-order clothing item(s) have you purchased? Please check all that apply and indicate the approximate cost of the item(s) in your currency? *

- A wedding dress
- An evening gown
- A suit
- A shirt, a blouse
- A dress
- A jacket, a blazer
- Trousers, pants
- Something else, please specify the item and the cost

3. Where did you buy the make-to-order clothing item(s) from? *

4. How did you hear about the make-to-order business that you bought the clothing item(s) from? Please check all that apply. *

- Website
- Social media, please specify which platform
- Family / friends
- Advertisement
- Other, please specify

A make-to-order clothing item can be customized and personalized according to predetermined options for you to choose from. The production of a make-to-order clothing item will be started after the customer has ordered the product.

5. Imagine that you are ordering a make-to-order clothing item online. Please rate the importance of these product attributes regarding the final make-to-order clothing item.

	Extremely unimportant	Unimportant	Neutral	Important	Extremely important
High-quality *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Durable / long-lasting *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Versatile *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Timeless / classic *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Price *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An investment piece *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
High in value *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unique *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sustainable / eco-friendly *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Emotionally durable i.e. you will like the clothing item for a long time *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Diverse *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good fit *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Flatters individual identity / creativity / self-image *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. Select all attributes that you associate with the production of make-to-order clothing. Please check all that apply. *

- Information available about the make-to-order production process
- Small-scale / small batches
- Local resources / local materials / local markets
- Social responsibility / fair labour conditions
- Craftsmanship / traditional production techniques / highly skilled labour
- Slow production / made with care and precision
- Environmental responsibility
- Technology is used to reduce waste and pollution
- You as a customer are part of the production process
- Long-term / mutually beneficial relationships

A make-to-order clothing item can be customized and personalized according to predetermined options for you to choose from. The production of a make-to-order clothing item will be started after the customer has ordered the product.

7. Imagine that you are ordering a make-to-order product online. Rate the importance of having this personalization/customization option available for you to choose from. *

	Extremely unimportant	Unimportant	Neutral	Important	Extremely important
Different fabric *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Different print *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Different colour *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Different standard size (XS,S,M,L) *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change the length of shirts *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change the length of trousers *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change the length of skirts/dresses *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Small changes in design e.g. different neckline *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change decorative elements e.g. buttons *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Custom size *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Add your initials / text *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Add other symbols *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. Imagine that you are ordering a make-to-order product online. How would these factors impact the likelihood of you purchasing from a particular brand?

	Extremely unlikely	Unlikely	Neutral	Likely	Extremely likely
Receiving personalized customer service *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to see how the make-to-order business arrived at the selling price of the item *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to see the final customized clothing item simulated on the screen *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to enter your measurements and see the final customized clothing item simulated on the screen on your body *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information available about the make-to-order production process *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Social responsibility information *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sustainability information *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Remember that make-to-order businesses allow you to customize and personalize the clothing item according to predetermined options for you to choose from.



9. Imagine that you decided to order the dress shirt above. A standard-sized shirt would cost 20€. How much would you be willing to pay for a made-to-order dress shirt? *



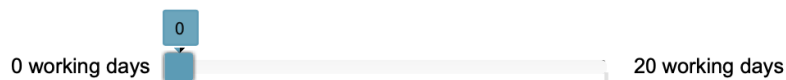
10. Imagine that you decided to order this dress shirt made-to-order. A standard-sized shirt would cost 20€. How much would you be willing to pay for a made-to-order dress shirt that is made from sustainable materials and produced in fair labor conditions? *



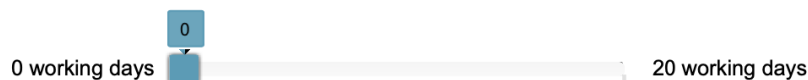
11. Imagine that you decided to order the dress shirt above made-to-order. How much do you agree with the following statements?

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
I would be willing to pay more for different fabric *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would be willing to pay more for different print *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would be willing to pay more for different colour *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would be willing to pay more if I could change the length of the hem *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would be willing to pay more if I could change the length of the sleeves *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would be willing to pay for for small changes in design e.g. different neckline *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would be willing to pay more if I could add decorative elements e.g. pockets, buttons *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would be willing to pay more for custom size *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would be willing to pay more if I could add my initials / other text *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would be willing to pay more if I could add other symbols / pictures *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. Let's assume that it takes 5 working days for you to receive a standard-sized dress shirt shipped from a warehouse. How long would you be willing to wait for a make-to-order shirt? *



13. Let's assume that it takes 5 working days for you to receive standard-sized jeans shipped from a warehouse. How long would you be willing to wait for make-to-order jeans? *



14. What is your age (in years)? *

15. What is your gender? *

- Female
- Male
- Other
- I prefer to not say

16. Where do you live? *

17. Enter your e-mail for a chance to win a 20€ gift card to a clothing store of your choice!

