



FLUID

THE STORE WPP  
THE WPP GLOBAL  
RETAIL PRACTICE

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RETAILING TO AN AUDIENCE OF ONE:  
HOW MASS CUSTOMISATION  
MAKES THE PERSONAL  
POSSIBLE – AND PROFITABLE

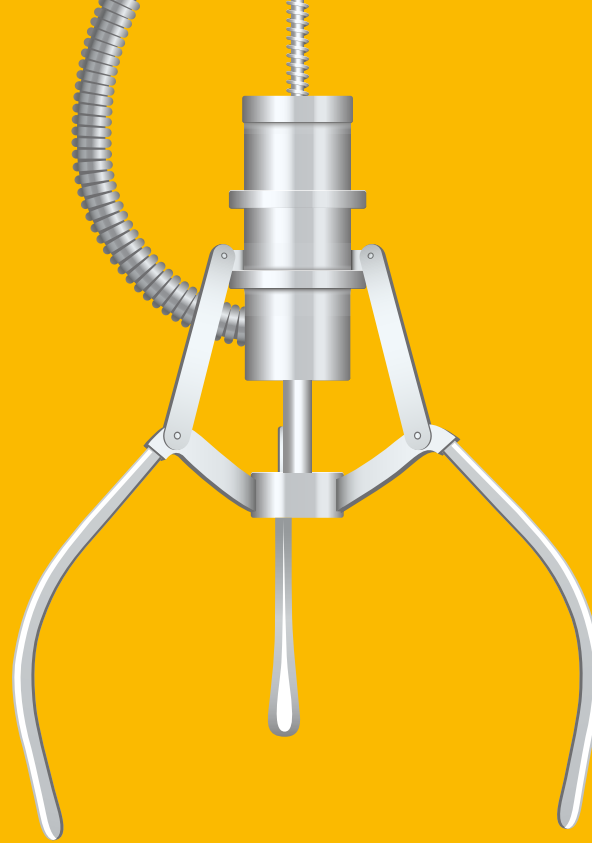
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# SECTION 1: PERSONALISATION - THE RETAIL FUTURE IS NOW

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## SECTION 1:

### PERSONALISATION - THE RETAIL FUTURE IS NOW

4

**\$399** BILLION

forecast value of e-commerce  
in the US in 2016

**21%**

rate at which global e-commerce  
is forecast to grow in 2016

**\$14.3** BILLION

amount spent online in China on just one  
day – Singles Day – in November 2015

**6.1** BILLION

number of smartphones expected  
to be in circulation by 2020



In so much of e-commerce,  
you hear people saying 'If  
we could only make it like  
the in-store experience'.  
This transcends it.

Andrew Sirotnik  
founder and chief experience officer, Fluid



**The rise of e-commerce has transformed the business of retail. But while e-tailing has provided consumers with unparalleled convenience, it has lacked the immersive, personal experience that 'real' shopping can provide. Until now.**

Now, technology allows online stores not just to get close to the experience that customers can have in a physical store - but in some ways to even surpass it.

The Store WPP and Fluid are deeply excited about the way personalisation and customisation are reshaping the retail experience for brands, retailers and consumers. We have produced this report together to show you the value that co-creation and personalisation can bring, and we hope to stimulate ideas and fresh approaches to business strategy. We are linking Fluid's proven customisation platform with the retail and consumer experience expertise of WPP, helping brands launch powerful personalisation programs that drive value, loyalty and engagement in highly competitive sectors.

Personalisation is moving beyond content, recommendations and offers; shoppers can mix and match thousands of items virtually in a way

that would be impossible in a physical shop. And customisation is delivering the ultimate personal experience – the bespoke product – designed by and for a market of one.

For brands and retailers, the value of personalisation comes in providing an intense, enduring, brand-building experience. It's a powerful antidote to the squeeze on margins being fuelled by widespread online price-cutting. It provides consumers with products and experiences they see as highly valuable, and for which they are prepared to pay a premium.

This new approach to e-tailing not only delivers brand differentiation and higher conversion rates, but also brand loyalty, innovation and, ultimately, brand love. A decade of WPP's proprietary BrandZ™ study into the most valuable global brands shows clearly that innovation is a key driver of growth in brand value, which in turn delivers superior returns for shareholders.



**David Roth**

CEO, The Store WPP  
EMEA & Asia  
David.Roth@wpp.com  
Twitter: @davidrothlondon



**Andrew Sirotnik**

Founder and  
Chief Experience Officer,  
Fluid  
hello@fluid.com  
Twitter: @fluid



## SECTION 1:

### PERSONALISATION - THE RETAIL FUTURE IS NOW

When consumers co-create with a brand, they spend more, come back more frequently, treasure their creations and, crucially, become advocates for the brand they have not only bought but have also shared an experience with. They become not just consumers of a brand, but a part of it – they go from being passive purchasers to partners with the brand owner in its development. This closeness makes them more loyal, long-term customers.

This report succinctly explains how personalisation and customisation can work for you, dispels some common myths, and demonstrates how the personal touch has been successfully deployed to sell products as diverse as chocolate and tuxedos, sports shoes and table linen. And it sets out why you should be actively looking at this as part of your innovation, brand-building and margin-growth business strategies.

There are case studies and interviews featuring global brands that have been pioneering in this field, and insight from across the WPP network into the value that businesses can add to their brands through joint co-creation and personalisation.

As you'll see, this doesn't have to be complicated or expensive to implement. In fact, it can actually make a business more efficient – and at the same time cultivate the next generation of brand loyalists.

To find out how WPP, Fluid and your business can explore the future together, feel free to get in touch.

Sincerely,

**David Roth**

CEO, The Store WPP  
EMEA & Asia

**Andrew Sirotnik**

Founder and Chief Experience Officer,  
Fluid



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**SECTION 2:**  
**DUCKS IN A ROW –**  
**WHY NOW IS THE TIME**  
**TO THINK DIFFERENTLY**

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## SECTION 2:

DUCKS IN A ROW – WHY NOW IS THE TIME TO THINK DIFFERENTLY

8

### CUSTOMISED PRODUCTS

Sell at a 40-50% price premium

Conversion rates are double

Account for 50% of revenue on e-commerce sites

**1.8** BILLION

the number of millennials in the world

**1/3**

proportion of e-commerce sales globally made via mobile



Marketing will shift from globalisation to personalisation. Personalisation is not a trend. It is a marketing tsunami.

Forbes





## SECTION 2:

### DUCKS IN A ROW – WHY NOW IS THE TIME TO THINK DIFFERENTLY

**The forces shaping retailing right now are immense. Digital consumers' attention spans are declining at the same time as their expectations are sharply rising. They want convenience and speed, but they also want something to experience something new, and they want to have a say in what they buy.**

Consumers are no longer satisfied being passive shoppers; they want to shape and contribute to the products and services they buy. Almost one-third of the world's population are millennials – people who were born digital, with the tools to be creative. They have grown up expecting a platform on which they can have a say, and they expect the brands they buy to listen and respond.

For brands and retailers, there is the 'Amazon effect' of e-tailing to contend with. Competition on price, convenience and assortment is squeezing margins and fuelling a race to the bottom. Personalisation presents them with a new way of competing. Amazon is great at many things, but it is not an authority in any particular product category, and it doesn't offer consumers something unique.

Personalisation gives consumers a unique product that matches their desires perfectly. But perhaps even more importantly, it allows them to enter into a partnership with a brand, creating something they simply can't get anywhere else. That differentiation forms a protective barrier around brands that helps them fend off competition that might otherwise be based on price.



# Stars in alignment



There are three concurrent forces at work that make now the ideal time to move into personalisation.

David Roth  
CEO of The Store WPP EMEA & Asia



## 1 Consumers are ready for individualisation.

They're tired of messages just saying 'You might also like ...' and 'Others who bought ...'. They want to be offered products that allow them to express themselves. By offering consumers personalisation, your products feel truly 'theirs'. This has big implications for revenue, engagement and customer loyalty – which all contribute to brand value.

## 2 The technology makes it not just possible, but a pleasure.

Curation software can guide consumers through the maze of choice towards their personal preferences in a way that feels not only effortless but also fun. The visualisation software now available means that what you see when you customise is what you get when your parcel arrives. The fine details – the sheen on the screws or the shimmer of a fabric choice – are incredibly realistic. This photo-realism helps browsers become buyers; they fall in love with their digital creations.

## 3 Production of one-off pieces is quicker and easier than it has ever been.

It does not require a huge capital outlay, and it enables manufacturers, at a stroke, to vastly increase the number of styles they can offer at any one time without increasing their SKU count or working capital inventory requirements – with the added issue of mark downs later on if the merchandise does not sell. With custom, brands can offer – literally – millions of variations of their products. Brand fans get exactly what they want, and the producers have a real-time research tool telling them exactly what's hot and what's not.



## YOUR NEW FAVOURITE CUSTOMERS...

Buyers who customise products:

MAKE **67%**  
more web site visits

SPEND **15%**  
longer on sites

BUY **22%**  
more frequently

PAY **28%**  
more

**Andrew Sirotnik, CXO, Fluid,** says there's a continuum of sophistication when it comes to personalisation that can help brands think about how to innovate:

- Combining existing products in a way that's unique to the shopper. They can pull together an outfit or 'make' a bed with co-ordinating linen, and virtually try before they buy.
- Adding a personal touch to an existing product, with initials on shirt cuffs, for instance, or a monogram to a bag or shoes.
- Customising a product that is made just for the shopper, with the colours and materials they select. The look is unique to that buyer.

- Customising to the extent that the performance of the product is unique to the buyer. By changing key elements of an item, like a bicycle frame or the thickness of the sole in sports shoes, consumers adjust not just its look but its function.

As brands guide their customers along this spectrum, the premium price that the experience attracts goes up.





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**SECTION 3:**  
**I DID IT MY WAY –**  
**HOW PERSONALISING**  
**AN ASSORTMENT HELPS**  
**CONSUMERS AND BRANDS**

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## SECTION 3:

**40%**

of consumers aged 16-30 are attracted to personalised goods and services

**71%**

of these say they're prepared to pay a premium for them

**88%**

The amount visual bundling can increase average order value by

**30%**

Consumers who shop across channels have a 30% higher lifetime value to a brand



**It's a breakthrough when e-commerce customers feel that they are having an experience as rich as one they can get in a store. Bridging the gap between the analog and digital world is the holy grail.**

Stuart Spiegel  
Principal at digital consultancy Spiegel Partners



### SECTION 3:

## I DID IT MY WAY – HOW PERSONALISING AN ASSORTMENT HELPS CONSUMERS AND BRAND

**Imagine taking a shop mannequin and dressing them in every possible combination of clothes in a store. Or picking up shoes from one department, a handbag from another, and carting everything to the dresses section to put together your ideal outfit. Few physical stores are set up to allow the kind of disorder this would create, and for categories with large products, like homeware, it would simply be impossible.**

But match-to-order personalisation tools – which can be deployed both online and in physical retail stores – enable consumers to do exactly this. Shoppers can virtually put items together from across a range or store, and find exactly the right combination for them – without the shop-floor chaos.

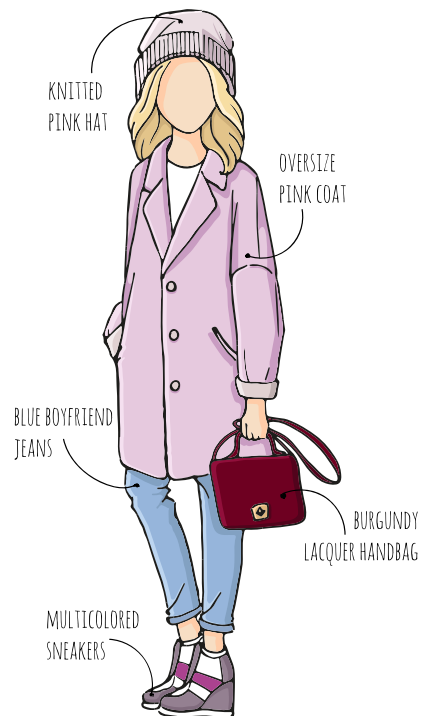
For the consumer, the ability to see combinations of goods inspires them to be creative and experiment with different pairings, and deepens their relationship with the brand or retailer that provides the service. They feel special, and valued.

Brands and retailers stand to benefit in three ways: they boost customer engagement, they increase conversion rates, and average order value goes up.



## Looks like my kind of thing

A great match-to-order experience lets consumers visualise in as realistic a way possible the look and feel of the group of products they are interested in, and see how these products work together.



The ability to see product groupings in a photo-realistic way is critical. They can tell that what they see is what they'll get. That helps them discover the products they really want, and provides reassurance that it will all look great together.

"In the end, it doesn't matter if you produced a product just for me, or just matched it out of an existing assortment; the essential thing is that you're able to give your customers exactly what they want," says Professor Frank Piller, a leading expert on Mass Customisation and member of MIT's Smart Customisation Group who teaches management at RWTH Aachen University in Germany.

"If you can create an experience that gets your customers close to what they want, even if that's from a line-up of the products you already offer, that will work."



Knowing how things are going to look together, rather than putting them all into a cart, is really important. It creates trust.

Matt Schow  
EVP, Marketing & E-commerce, Generation Tux



## You might also like...

This is not about Amazon-style recommendations but with better pictures. Rather than showing someone products they might like but weren't looking for, a good personalisation system provides the all-important context that shoppers are looking for. It gives them confidence that their items look great together, making them more likely to hit 'buy'.

A well-designed match-to-order experience makes

mass personalisation possible across a range of business models. It enables brands and retailers to more effectively sell groups of products while still offering the personalised touch consumers are hungry for, opening the door to potentially massive revenue and engagement benefits. It can also make sure that consumers only put together a combination using products that are in stock, reducing the risk of cart abandonment if one crucial item isn't available.

**Those in the know Brands using visual mix-and-match experiences online or in-store include:**

eSalon.

JCPenney



**DOLLARSHAVECLUB**

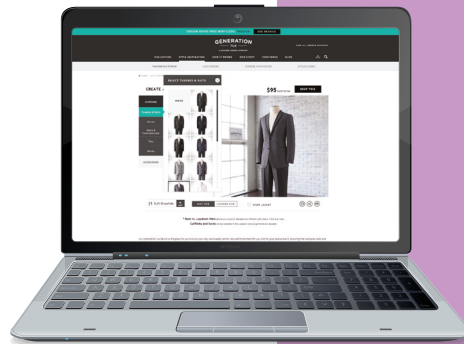


# Suited and booted

Generation Tux is an online suit and tuxedo rental service that uses a photo-realistic configuration tool to help consumers put together just the right look for their special occasion.

“In our industry there was a strong need for it,” says Matt Schow, Executive Vice President, Marketing & E-commerce, at Generation Tux. “The customer is doing something they’ve probably never done before, they’re putting a whole outfit together, and knowing how things are going to look together, rather than putting them all into a cart, is really important. And for us, what it does is it creates trust.”

Shoppers start by selecting a pre-styled look, and then can play around with it, personalising it for the exact finish they want. Over 70% of customers who rent a garment have done so after using the visualiser. Creations are being shared on social media, the site has attracted media coverage and people are talking about Generation Tux.



## Making a splash...

Schow credits the realism of the imagery with its success; realistic backgrounds, complete with a goldfish swimming in a bowl, are the icing on the cake.

“The decision to use the fish was not a small decision, and it was quite hard to do. But I’ll tell you that almost everybody I know who’s ever talked to me about the site raves about the fish. It’s that little delightful extra step that makes (the company) stand apart,” he says.

“It’s the very tippy-top of the pyramid. You can have a perfectly stable business like everybody else, without a golden capstone, or you choose to try and have a golden capstone. You can have one that reflects further and further out. But you can’t achieve that without some creative risk. If a company doesn’t understand that, then they may have a hard time helping their customers understand that.

“It’s pays huge dividends. If I hadn’t done the fish, it would still be great, but the fact that I did, and it was only a small cost relative to everything else, made it go to another level.”

# Sweet dreams

Home textiles manufacturer Matouk began selling directly to consumers via matouk.com in 2013. To bring the brand to life, they implemented Fluid Visual Mix & Match, so consumers could see not just packs in a virtual basket but see beds made up with their selection. Images are so realistic they show subtle textures and shadowing.

“Beds are big and it’s prohibitively expensive and time-consuming to stage photographs of every style and colour combination,” says Stuart Kiely, Matouk’s senior director of technology and marketing. “We wanted to build an online experience where customers are able to create

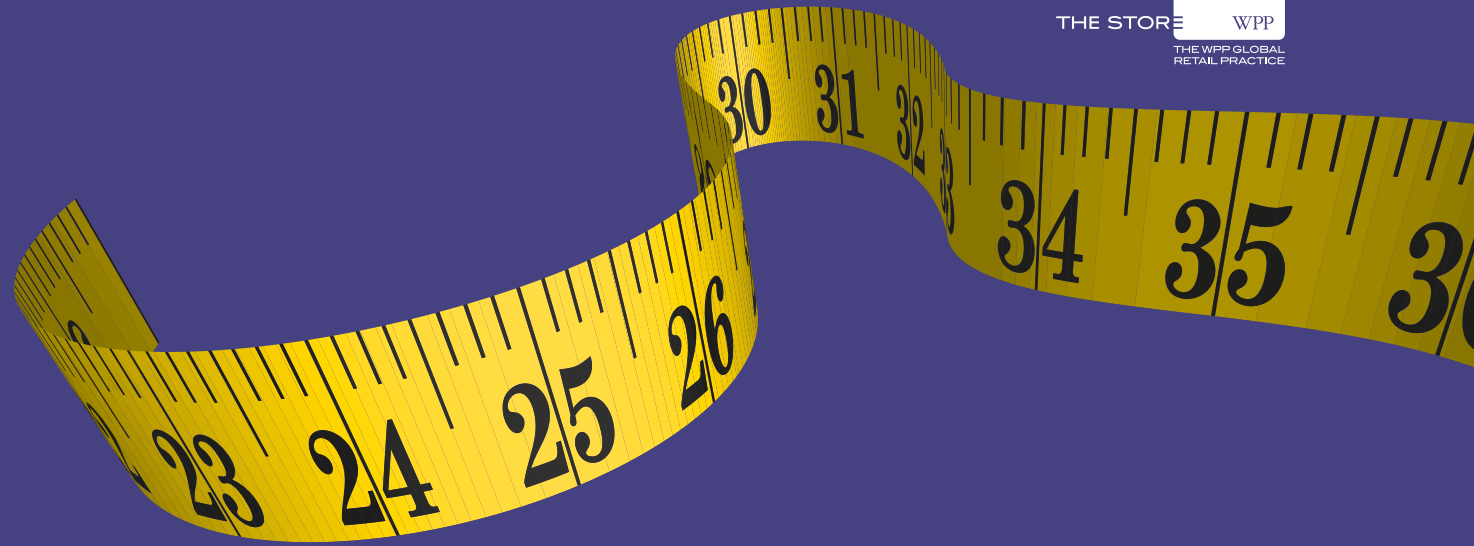
their own personalised bedding combinations that align perfectly with their needs and tastes, by allowing them to mix and match across our entire product line in a way that was previously impossible.”

Matouk went live in November 2014. Today, it’s possible to configure more than 100 million different style, colour and component combinations.

Engagement and sales are up, interior designers use the tool in clients’ homes, and it helps retailers, too. The tool has delivered a 700% increase in dwell time on the site.

**Luxury bedding retailer Serena & Lily also uses photo-realistic personalisation on their site to enable consumers to visualise the bed of their dreams by co-ordinating existing products.**

- **Conversion rates have doubled**
- **Dwell time has shot up 115%**
- **Bounce rates have dropped 79%**



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**SECTION 4:  
MADE TO MEASURE –  
DESIGNING WITH, AND FOR  
AN AUDIENCE OF ONE**

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Custom products command  
an average price premium of

**20%-40%**

Conversion rates rise by as much as

**200%**

Return rates  
drop by up to

**33%**

Average order  
value rises

**20%**

Sales cycles shorten by up to

**75%**



In this age of mass consumption, there are consumers who want to identify with the brand, and be recognised simultaneously as an individual. That's where customisation plays a critical role.

Adrian Stevens  
VP of Global e-Commerce, Wolverine Brands



**In the old days, products were made to order. Then for decades, mass production and economies of scale meant uniformity became the order of the day.**

**Now, the tide is turning. Consumers – especially the young – are seeking something different. They want what no one else has, and brands are increasingly saying, ‘have it your way – create with us’.**

Brands that want to move away from battles over price and convenience are using customisation to differentiate themselves and provide a shopping experience that goes beyond delivering a product. Customisation promotes brand sharing, builds loyalty, and gives consumers unprecedented choice.

The more control you put in consumers’ hands, the more they like it.

One size no longer fits all, and it doesn’t have to. Innovations such as 3D printing and increasingly flexible ways of manufacturing mean mass customisation is within reach of every brand. Production lines can be refined in ways that mean designing and manufacturing for an audience of one is not prohibitively expensive; in fact, it makes great business sense, which is why customisation is going mainstream.

Consumers can now design their own goods well beyond size and colour combinations. In a single pair of shoes, there can be a dozen or more customisable elements, from sole styles

and colours through to logos, laces and even the eyelets that laces pass through. In clothing, there are collar styles, buttons, pockets and linings to customise. Handbags, suits, sports equipment, food and toys are also getting the custom treatment.

Companies that offer customisation stand to make significant gains. Shoppers who customise are often willing to pay a premium of 40 to 50% to have something made just for them. In the longer term, brands build a closer relationship with their customers. Shoppers who buy custom tend to come back more often, and they talk about the brand and ‘their’ design with their friends. They proudly share their creations across social networks.

Customisation done well means making the process fun and easy, and do-able on any device in any location. Consumers also want to be guided through the process. A blank canvas can have a paralysing effect, but brands that give consumers a range of starting points from which to take their own creative leap fare extremely well.





When you offer custom products, individuals have products that can say 'This is who I am. This is who I want to be.'

Adrian Stevens  
VP of Global e-Commerce, Wolverine Brands



**We've typically seen that if you take one of your bestselling stock items, and offer it as customisable, in the first few months it'll be between 10 to 15% of your e-commerce sales, but that can quickly grow to 30 to 40% and higher.**



The multi-colours of M&M's chocolates are loved world-wide, but now the ability to customise candy – not just by choosing colours but by having messages and even photos stamped on individual pieces – has made them a personalisation sensation.

My M&Ms, available through [www.mymms.com](http://www.mymms.com), have become sought-after gifts, mementoes and wedding favours. They can be printed on the customer's favourite colours from the M&M's range of 15, with personalised messages, pictures and company logos. They come in special gift packs, at a huge premium to the cost of a regular pack of M&Ms. Brand owner Mars offers custom packages that range from about \$70 upwards.

## All aboard

Fluid customers Keds, Sperry and Chaco are all footwear brands in the Wolverine stable, and customisation became part of the offer from all three as the CEO sought to build a more direct relationship with consumers.

“Many aspects of the retail world have woken up to the fact that today’s consumers have a huge feeling of individuality, and you ignore that at your peril,” says Adrian Stevens, VP of Global e-Commerce at Wolverine Brands. “Customers want to be a part of the brand, and they want to create something unique to them.”

In the case of Sperry, consumers can design their own ‘Intrepid’ boat

shoes using one of 10 colours for the upper, 15 lace options, different thread, eyelet and sole choices, and even finish them with a hand-drawn shark image.

Stevens says it’s essential that customisation and the experience of it that consumers get is a perfect fit with a brand’s DNA. For Keds, the site feels like being in a design studio – it feels young and fresh, just like the brand. Sperry, meanwhile, has its heritage in boating on the east coast of the US. “The Sperry of today is really about individuals taking a journey, whatever that may be. It’s about redefining Sperry as a brand for travellers and adventurers. It’s about more than boat shoes ... it’s about individualism.”

## Everyone’s a winner



**NIKE’s customisation programme, called NIKEid, generated more than \$600 million in revenue in 2015 – a figure that’s tipped to exceed \$1 billion by 2017 through sales of customised shoes, bags and clothing. Over 60% of NIKE’s dot.com business is now custom.**

**Reebok’s Made to Order customisation service accounts for 40% of online revenue and is the single biggest revenue generator on Reebok.com. And more than 60% of PUMA’s Arsenal football jerseys are custom-made.**



**As our customisation business evolved, the margins were great, product returns were reduced, and we were charging at least 20% more at retail. Custom products eventually became the tip of the spear that allowed our digital business to go global, as custom products were shipped directly to consumers, completely bypassing local distributors.**







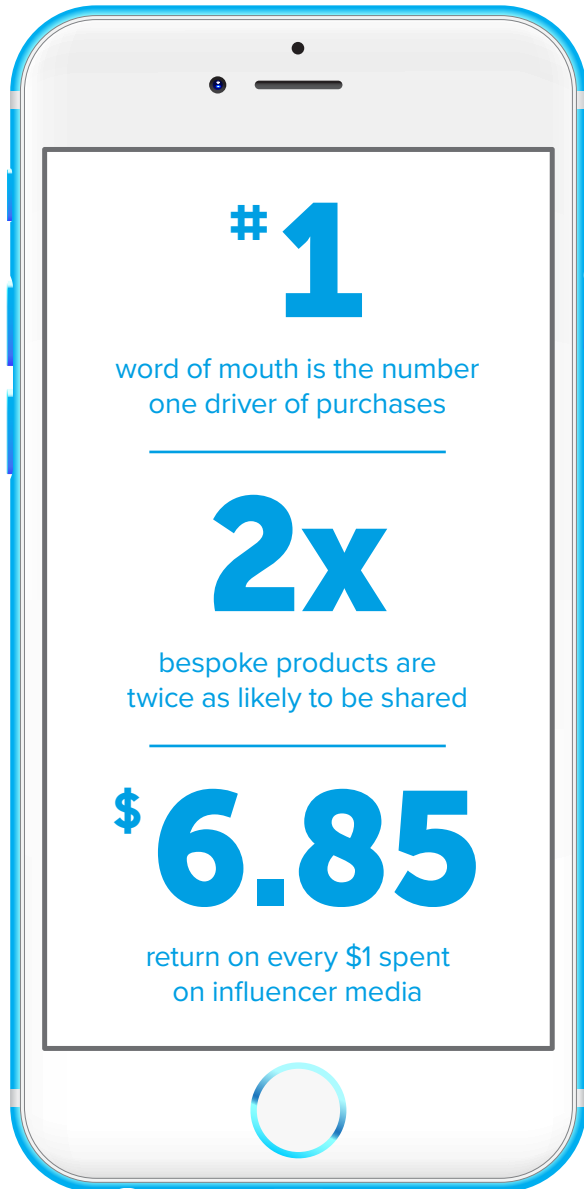
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**SECTION 5:**  
**HOW SOCIAL SHARING ADDS  
POWER TO PERSONALISATION**

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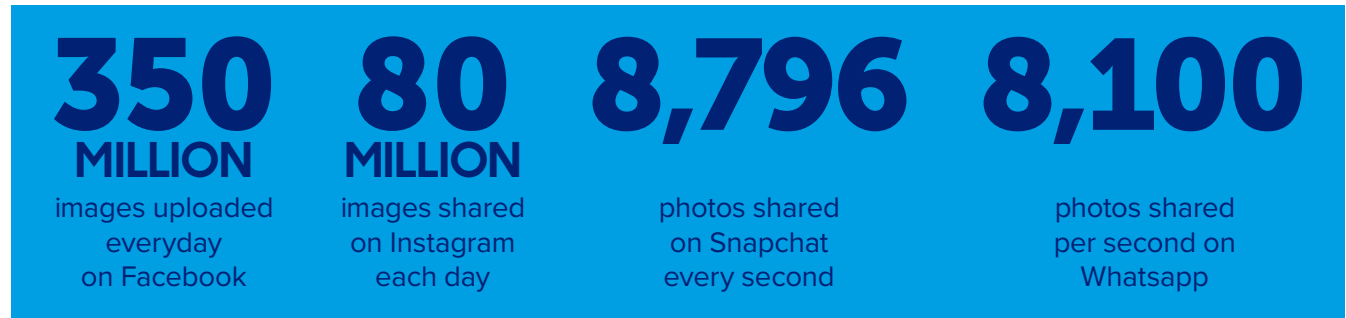
SECTION 5:

HOW SOCIAL SHARING ADDS POWER TO PERSONALISATION



Our customers are inherently social – they're on the move and they want to share their experiences with their friends and they don't want to be limited by their location or device.

Evelyn Lee  
SVP marketing & e-commerce, Charlotte Russe



**Consumers who create personalised collections and customised products are not just getting the very thing they want, they're also generating highly shareable branded content.**

At a time when people are sharing more than 1.5 billion pictures online every day, brands that provide consumers with something they feel motivated to share are deepening their relationship with the shopper, and at the same time promoting their brand to that person's network of friends.

Customisers are proud of their creations, and custom products are twice as likely to be shared socially as regular off-the-shelf product, Fluid research shows. This makes social media a powerful tool for amplifying the success of personalisation and customisation programs, driving more users to the brand.

Numbers of shares, tweets, pins and designs can all be measured and provide vital metrics on consumer-brand engagement. Research by Deloitte shows that a strong customisation experience can deliver returns of five to eight times ROI on marketing spend.

Candace Kuss is Director of Social Media at Hill+Knowlton Strategies, a public relations company which is part of WPP. She says that in consumers' minds, there's a spectrum of

trustworthiness and credibility when it comes to recommendations, and the views of those closest to you are most valuable, with paid-for advertising at the other end, and editorial endorsement or blogger or vlogger backing somewhere in between.

"An earned media impression coming from the best of all possible sources, which is someone you actually know, who's your friend and who you trust ... carries a much higher magnitude of belief and trust," she says. "A word-of-mouth recommendation from a true influencer, which is our friends and family, those closest to us, has the most relevance and the most strength."

Andrew Sirotnik, chief experience officer at Fluid, says customisation is proving to be a tremendous engagement platform. "We had 2 million shares on our customisation platform last year, and probably 10 to 20,000 unique designs generated weekly. Not all of those are being purchased, but the value there is in engaging for a huge amount of time, they're sharing it out – it represents a piece of themselves – to their social circle, and they're sending it out proudly."

## Leave the cat out of it

The value of a recommendation from someone close is that everyone knows it's genuine. This kind of brand 'impression' just cannot be bought – and that's what makes it so trustworthy. What brands can do, though, is help people have discussions about brands and make it easy to share pictures.

Kuss says brands need to be realistic about what people really want to talk about, and encourage natural discussion rather than try to force it. "The more likely the purchase is to involve real-life conversations with friends and family, if you're buying a car for example, that's something it's quite natural to talk to other people about, the more likely it is to happen. I don't think customising a product will make people want to share it if it's not a shareable type of purchase anyway.

"If it's an Adidas pair of shoes and I'm customising it, that is a passion brand and I might be more likely to share that anyway, and then the customisation part of it adds to that, especially if the mechanics by which I customise it makes it easy to capture a screenshot and share."

Kuss advises: "Look at how consumers go about these paths to purchase already and see if you can make easier, better, faster and add some value, but don't try to make them do something that's just not going to happen. Like, I'm just not going to collaborate with you on the kind of cat food I buy."

**JCPenney promoted their 'Bend the Trend' back-to-school personalisation tool with an online video series on AwesomenessTV featuring top YouTube talent sporting outfits they had created using the store's interactive styler. Outfits are highly shareable, and the brand declared August 12 "National Shout-Out Day", urging kids and teens to share outfits and pass on compliments with comments and branded compliment cards via Tumblr. 'Bend the Trend' also had a charitable element, with shoppers urged to round up the cost of their shopping to the nearest dollar, with the difference going to organisations supported by the JCPenney Cares fund.**

# Winning 'friends' and influencing people

**Influencer marketing is a strong match for brands providing personalisation and the consumers who seek it out. The media landscape and people's consumption habits mean messages delivered by the right person can be as effective – if not more so – than those delivered at a higher volume.**

Brands need reach, but they also need engagement. Burberry recently selected Brooklyn Beckham, teenage son of David and Victoria, to photograph its latest fragrance ad, more for the digital following he has than for his photographic prowess. The 16-year-old has 5.9 million Instagram followers, and his pictures and videos generated 15 million impressions through Instagram and Snapchat in just eight hours.

Fluid research shows that for every \$1 spent on in influencer media, there is a \$6.85 return. These campaigns have been hugely successful for brands such as Vans and Franklin.

M&Ms, for example, debuted their My M&M configurator by sponsoring the Halloween 2015 episode of the Ellen Degeneres Show as part of their #MySweetStory campaign, generating millions of impressions. Stance Socks has partnered with celebrities whose image chimes

with the brand to promote its customisable socks. Stars such as Rihanna and Willow Smith have own styles, so consumers can buy the socks they have created, or adapt them and make them their own. And Lovesac teamed up with Emmy Award-winning dancer Chelsie Hightower to create a dance video co-starring their Sactional configurable furniture.

Stuart Kiely, Matouk's senior director of technology and marketing, says content marketing has been part of the homeware company's success with personalisation. "We've partnered with popular design bloggers to have them use the tool to create their own ideal set-ups, and this has been a major driver of awareness and web traffic for us. The feedback from our retail and interior design partners has been overwhelmingly positive, and it's driving engagement between us and our trade partners. We occupy more mind share."



## SECTION 5:

### HOW SOCIAL SHARING ADDS POWER TO PERSONALISATION

Candace Kuss from Hill+Knowlton Strategies says social media has changed the way people regard closeness, giving some online influencers a powerful combination of trust and reach.

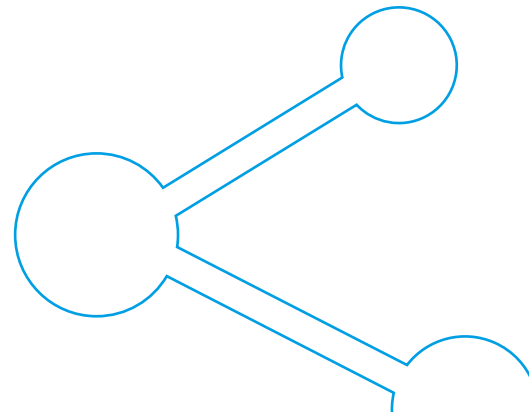
“The world of digital has brought the world closer, and what it’s done is sometimes made strangers closer to your inner circle because you feel about them as you do friends. A lot of YouTubers have built up a fan base where those fans think of them like a real friend. The closer you get, the stronger the trust in that recommendation.

“What no one really knows is how much of that closeness fans feel about what they say (will remain) the more they start to openly endorse products. It’ll be interesting, and it won’t be one-size-fits-all. The YouTubers will each figure out what’s right for them; some will retain a lot of trust and for others, fans will go ‘I still like her videos but I know she’s getting paid to say that.’”



**A word-of-mouth recommendation from a true influencer, which is our friends and family, those closest to us, has the most relevance and the most strength.**

Candace Kuss  
Hill+Knowlton Strategies





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**SECTION 6:**  
**ALL THE REASONS BRANDS  
THINK CUSTOMISATION IS TOO  
HARD, AND WHY IT REALLY ISN'T**

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# Customisation is a business opportunity, not a marketing exercise; the volume is there, and so is the revenue, with some companies driving well north of \$100M a year in revenue from custom.

Jud Barr  
Principal at JTB Consulting



The benefits of personalisation are something most brand managers appreciate. But the prospect of actually launching it – adapting web sites, workflows and factories – can strike fear into their hearts.

Fluid founder Andrew Sirotnik says this fear factor is entirely to be expected. “It wasn’t too long ago that I would have conversations with brands

and they were ruminating about whether or not they would adopt e-commerce. It was a question back then. We saw it later with Amazon Prime; there were a lot of doubters saying ‘why would consumers even care about getting your diapers on the second day when you can get them in five days for the same price?’, and it’s totally changed the world. It’s completely changed consumer behaviour.” Customisation is the new, new thing, and there are similar questions being asked.

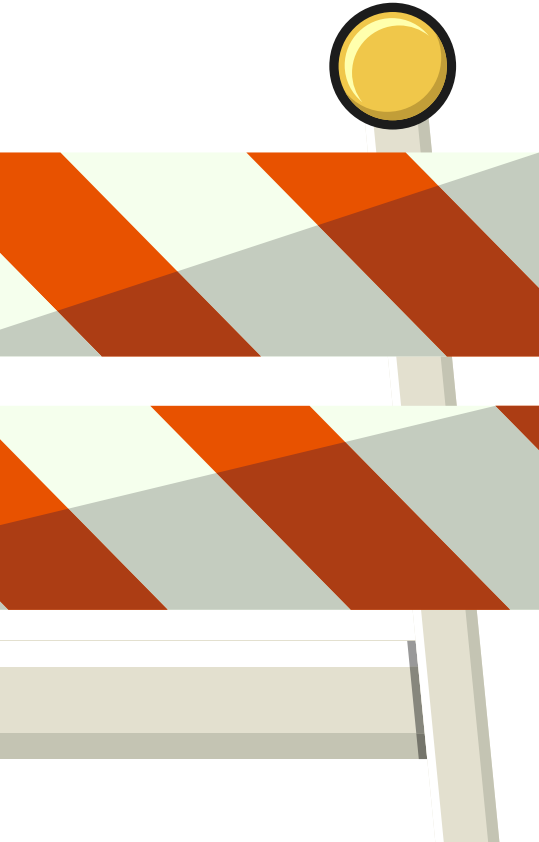
The concerns businesses have often seem big, but they can be overcome. Jud Barr, Principal at JTB Consulting, which helps businesses adapt to this new way of working, says success hangs on having a solid strategy, from front-end software to manufacturing and supply-chain management. What surprises many businesses, he says, is how easily hurdles can be overcome, how fast it can be done, and the results that can be achieved.



# Common roadblocks, and how to shift them

## 1

### This is just for sports gear and footwear, not my category



Footwear brands have been the pioneers of consumer-based mass personalisation. Nike has been doing it for over 10 years, and in sporting goods and especially in footwear, the market has reached a tipping point where this is no longer a novelty or experiment but a 'must have' in consumers' minds. Clothing and equipment are ripe for customisation because they, too, lend themselves to experimentation with colours and materials, and adaptations that affect the performance and characteristics of the product itself. But there's scope for personalisation of everything from a reusable coffee mug to a pack of chocolate. It's even possible to build cars with panels designed by consumers and made to their specification, which Daihatsu has offered in collaboration with Stratsys 3D printing.

## 2

### Consumers aren't designers – they'll make something awful with my brand on it

Most people are not designers, it's true, and often the value of the product a brand offers is in the design that highly experienced hands with highly trained eyes have put together – people whose job it is to design for the consumer. But consumers are now demanding the freedom to create. Brands don't have to present consumers with a blank canvas and infinite palette of options with which to do their creating, though, and most consumers would be put off by so many choices. Customisation works best when shoppers are given a choice of starting points, and then a number of adaptations they can make that turn a stock item into their own creation – the finishing touches that make an item one-of-a-kind, and instantly so much more valuable to the person behind it.

And if you don't want your high-end menswear lined with tie-die or camouflage, don't offer those options in the customisation process.



# Common roadblocks, and how to shift them

## 3

### It's just too expensive, and my factory couldn't do it

“The notion that customisation equals high cost is a myth,” says Jud Barr. We have grown up to believe economies of scale are the only way, but Barr points out that the assembly time for an individual item is the same, whether it's a one off or one of 10,000 pieces. What's different is how the factory is set up to flow. “Sometimes people struggle with what that looks like, but generally we can make any factory profitable with a batch size of one.” The up-side of customisation is that brands can reduce the number of SKUs they stock, they have to store less stock, and they have lower levels of unsold stock so need to discount less. Factory reviews to enable customisation often lead to efficiency gains for non-custom production. “Typically, we can achieve a 50% increase in output and a 30% decrease in the amount of labour it takes to assemble that,” says Barr.

## 4

### It takes too long – customers want stuff faster than that

Speedy production isn't at odds with personalisation. The idea that making one of something takes a long time is mistaken, as long as production lines are properly structured from the beginning. Stance socks, for instance, has a set-up in California that allows them to turn around a highly customised single pair of socks in 48 hours. Good systems work fast. Setting up production can be done in as little as a month, with the cost of custom production at between 2% and 10% above the cost for making regular lines – a margin easily covered by the premium shoppers are willing to pay for a bespoke item.

## 5

### We'd lose control of the accounting

Many businesses' systems are set up to deal with purchase orders for, say, 10,000 units, which feels like a firm, substantial order. The idea of replacing much of that with what might be a trickle of individual orders seems alarming. What's powerful, though, is that the customer pays for a customised product before the factory begins to make it, so from a cash-flow perspective, it's appealing, and there's less risk of being stuck with unwanted inventory.





**All of those concerns about cost and time are absolutely legitimate, and I had the same concerns – I knew it was going to cost a lot of money to do it right and that visualisers are great interactive tools that don't always lead to a sale, but they do influence sales. They create trust, and over 70% of our converted customers work with the visualiser in some capacity.**

Matt Schow  
Executive Vice President, Marketing & E-commerce at Generation Tux



## SECTION 6:

ALL THE REASONS BRANDS THINK CUSTOMISATION IS TOO HARD, AND WHY IT REALLY ISN'T

36

# On your marks, get set, go!

Sports brand PUMA launched its custom jersey tool in Summer 2015, allowing fans of Arsenal Football Club to have shirts made with their own name and number on the back.

From inception to public launch, the process was achieved in just 90 days.

“We’d been considering adding customisation to our digital experience for more than a year, and the launch of the 2015/2016 Arsenal kit presented itself as a perfect opportunity to debut this offering to our fans and customers,” said

Tom Davis, PUMA’s Global Head of e-Commerce.

The brand launched the jerseys as “Powered by Fans”. Custom orders now account for more than 60% of sales, and command a 30% price premium.

“This initial success reinforces the trend towards customisation within the e-commerce space,” Davis said. “And I’m confident PUMA will consider other ways to let our fans power our products going forward.”



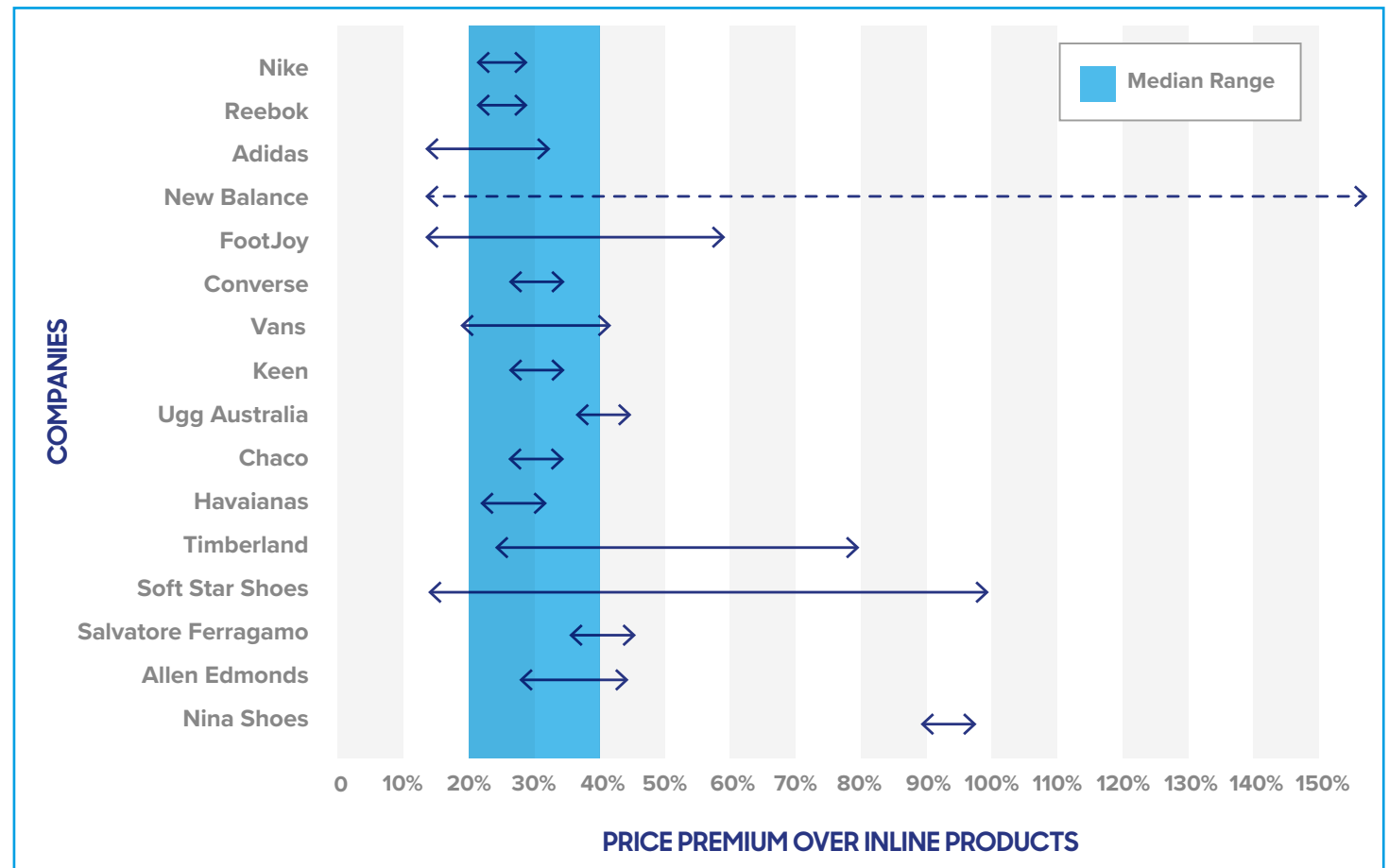
## The notion that customisation equals high cost is a myth.

Jud Barr  
Principal at JTB Consulting



# The big pay off

Consumers are willing to pay significantly more for a product they have adapted, designed or created in collaboration with a brand than one they've chosen from stock.





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**SECTION 7:**  
**LET IT GO – BUT ONLY SO FAR**

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**Brands are like living organisms; they get influenced by how people view them and use them.**

Emily Culp  
Chief Marketing Officer, Keds



**When brands give consumers the freedom to customise, they begin to share control over their products and their brand.**

**In organisations where marketers see themselves as brand guardians or even brand directors, this can feel like a risky step to take.**

Emily Smith is Brand Director at Added Value, the global brand strategy consultancy and part of WPP. She says that in a market that's increasingly being driven by millennial and generation Y consumers, it's becoming the only possible step to take.

“All brands don't have to be flexible to the same degree, but it's such a big trend for brands to be open, approachable and malleable, that you're really missing a trick if you're not in on that to some extent,” she says.

“People don't believe brands are perfect; they believe brands have got a role to play in their lives, but it's very much something they want to control. The brands that are able to accept that they are simply some brilliant raw materials to play around with are the brands doing really well in this space. But some brands bury their heads in the sand about this – they do find it difficult.”



## SECTION 7:

### LET IT GO – BUT ONLY SO FAR

Smith says that in decades past, individualism often had negative connotations of strangeness and loner figures. Now, however, the desire for individualism – often within a group - is very much mainstream, creating a tension that brands and retailers can help consumers manage.

Freedom to customise can be about more than the product itself; it could be customising service – how often do you want to hear from a brand, for instance – or the post-purchase experience, by allowing people to link products and services, such as sports shoes with fitness apps and music, and fashion brands inviting fans to virtually attend catwalk shows. It can also be about brand communications.

Coca-Cola, Smith says, is a great example of what can happen when consumers are part of the conversation. “They’ve said ‘do you know what? The best and most interesting content comes when we relinquish some control, consumers get involved and they tell us their stories and things kind of spiral.’

“Give people freedom to play with your brands and products and make them their own. People expect this; they demand it. They engage with brands that invite interaction and give them the power to influence how that brand comes to life in the world.”

Emily Culp, Chief Marketing Officer at Keds, says customisation is something that only the brand itself can provide to consumers, so is highly valuable in many ways.

“We have the production, we have the design, and we have the understanding of our customer. And we hope that customisation will inform our products. I hope custom can be used as a test vehicle to learn about customer preferences and even inform our main line products.

“Customisation allows, rather uniquely, for a dialogue. Instead of saying ‘here is what we have for you’, customisation allows you to ask ‘what would you like?’ and if you can listen to that there is huge potential there.”





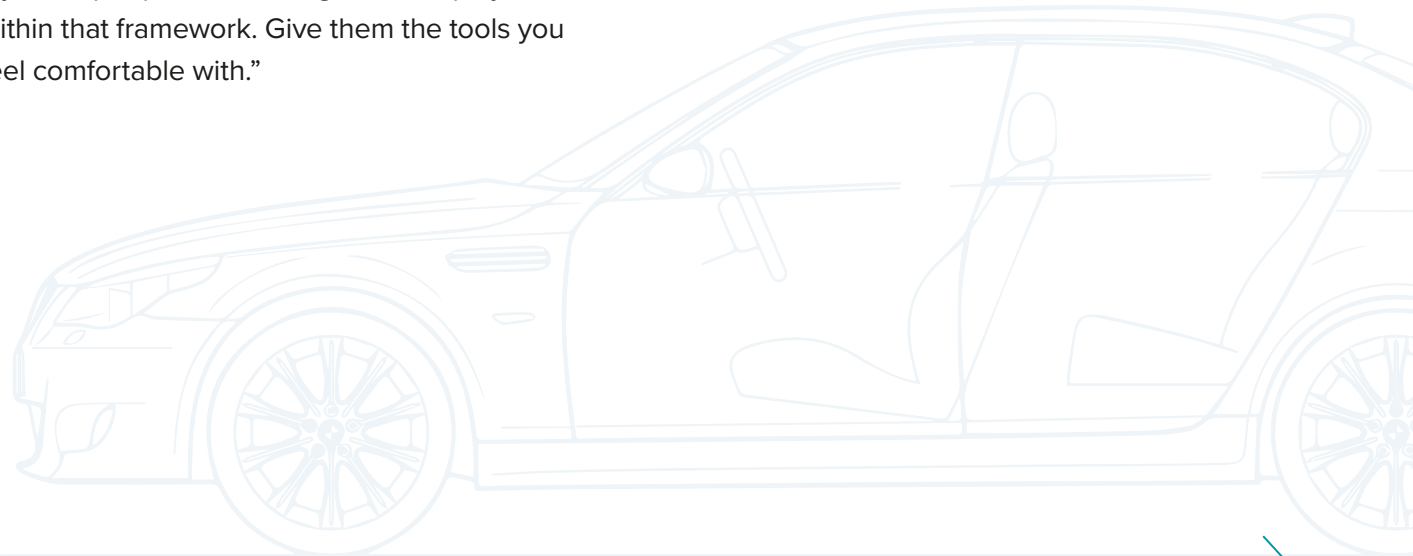
# Cool enough to share

Smith says the act of opening up and sharing control signals, in itself, something compelling to consumers about the brand's own strength and confidence.

“Brands that say ‘yeah, we’re OK with you messing with us, we’re confident in who we are, we know the kind of conversations we want to start and we want to get people involved’ ... are the ones doing well now,” says Smith. “The brands that worry and are fearful are the brands that are going to get left behind.”

That doesn't mean endorsing creations that are at odds with the brand; if you don't want consumers to make a polka-dot version of your sports car or designer trench coat, don't provide that as an option.

“The role of a brand marketing team is to put in place some guardrails for what is and isn't acceptable,” Smith says, pointing to the way BMW allows new car buyers to build their own spec and apply it to its standard range of models. “BMW is one of the ultimate mass-customised brands. The way they control their brand is they give people a range of options and solutions that they feel help contribute to their proposition of joy. Give people license to go off and play, but within that framework. Give them the tools you feel comfortable with.”





**People don't believe brands are perfect;  
they believe brands have got a role to play  
in their lives, but it's very much something  
they want to control.**

Emily Smith  
Brand Director, Added Value



## The Power of Love

There is a powerful link between brand innovation and consumer love, and both add to a brand's bottom line.

Communications and brand equity research company Millward Brown has analysed 10 years of WPP proprietary BrandZ™ research into the world's most valuable brands – what makes them become leaders, and what helps them stay strong.

They've found that if a brand inspires consumer love - a genuine fondness for that brand - it can help that brand command a premium over the competition and achieve higher volume sales.

[www.brandz.com](http://www.brandz.com)

**BRANDZ™**

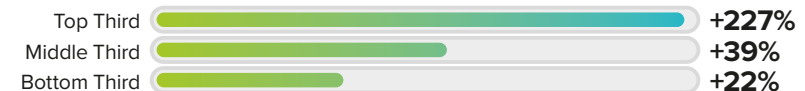
 MillwardBrown

## Innovation is a key driver of love.

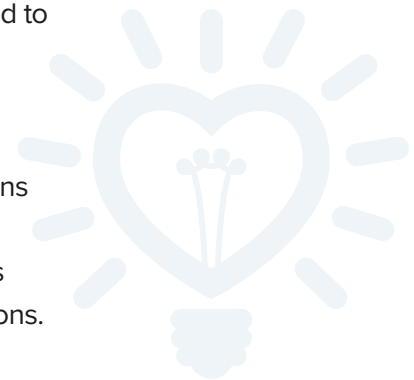
Love is not just about appearing caring, although that can help if it's genuine. Love is usually closely linked to performance and innovation.

Innovation inspires a consumer to try something new, and when performance lives up to expectations and there's a sense of partnership between brand and user, that can lead to love. This love then helps sustain a brand during the times between innovations.

Love is not just a 'nice to have' factor for brands; brands that are loved by consumers post the strongest growth in brand value. Evidence from the BrandZ™ Top 100 Most Valuable Global Brands over 10 years shows that the most loved one-third of brands grew in value by 227 per cent. The middle third grew by 39 per cent and those with the lowest love scores grew their brand value just 22 per cent over the same period.



Source: BrandZ™ / Millward Brown



## Elastic brands

Brands across a huge swathe of categories have seen success by giving consumers the freedom to play. In the United States, McDonald's has offered a 'build your own burger' service where customers choose their lunch contents using a tablet at the order point. Coca-Cola's Freestyle vending machines allow consumers to create their own combination of soda brands in the proportions they choose, and Starbucks has successfully trialed customised cold drinks in the US, Japan and Singapore. Havaianas flip-flops have been allowing shoppers to design their own shoes both online and in pop-up stores, while Doritos and Audi have famously crowdsourced and co-created TV commercials for their prestigious Super Bowl slots. These brands understand that people want to play a creative role in the story of their brands, so they offer creative and sensory experiences at and beyond the moment of consumption.



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**SECTION 8:**  
**LITTLE LUXURIES –**  
**THE ULTIMATE EXCLUSIVE**

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**30%**

proportion of global luxury sales to Chinese consumers

**75%**

proportion of luxury sales driven by digital touchpoints

**4%-10%**

proportion of luxury sales made through e-commerce

(source: L'Agence Plus)



The key driver for us is product differentiation. With so many of our customers turning to our distributors for pricing bargains, custom brings that business back in house, and gives us something unique to offer that commands a premium.

Jeremy Levine  
Vice President of e-Commerce at Michael Kors



**Luxury brands already command a price premium, and buyers of those brands are increasingly looking to stand out and differentiate themselves from other luxury shoppers. Having a well-curated customisation experience that offers them something even more special, unique and premium would seem like a kid-glove fit.**

Yet for many luxury marques, there is resistance to change – more hesitation than perhaps in other business sectors to handing over any control to consumers. We have seen this before; luxury names were latecomers to digital advertising, unconvinced for a time that the beauty of a glossy magazine page could be replicated on a screen. Then there was e-commerce, and a degree of disbelief that consumers would consider clicking ‘add to basket’ as an alternative to a sensuous in-store experience.

When it comes to personalisation, the view at many luxury brands is that their desirability is based on their own designs, and their own curation of materials, cuts and colours. Others, however, are seizing the opportunity that photo-realistic imagery and the consumer desire for something a little different now provide.

“It’s difficult to generalise across all of luxury; some brands are very advanced in terms of digital communications and sales, and others are quite behind,” says Cecile Berger, CEO, L’Agence Plus Global at Mindshare. “The view of some

consumers, too, is that they don’t know how to create, and if you have to do it yourself, why are you paying?”

Minds are gradually opening, however. Prada is inviting consumers to select from 32 colours and have their bespoke Prada brogues monogrammed on the sole. Louis Vuitton has been offering personalisation through its Mon Monogram service for more than five years, Hermès has its Custom Silk Corner, for personalising scarves, and Smythson gives buyers the chance to personalise diaries and other stationery with names and images. Harrods in 2014 held a high-end event called “Made with Love”, introducing its customers to bespoke products and services from brands such as Gucci and La Perla.

Brooks Brothers’ Design Your Own service allows online shoppers to tailor their own shirts and suits, with their preferred combination of style, colour, fabric, lapels, vents, pockets and lining. Burberry allows consumers to personalise items by adding monograms to scarves, accessories and bottles of fragrance.



## SECTION 8:

### LITTLE LUXURIES – THE ULTIMATE EXCLUSIVE

Bertrand Marty, Global Digital Lead at Mindshare, explains that the appetite for personalisation among luxury brands probably has much to do with the amount of business different parts of the industry do online. E-commerce sales of fragrance, for instance, represent between 8 to 10% of global sales, and beauty products are similarly big online. Watches and jewellery are far more likely to be bought in a physical store, however, with e-tailing just 4 to 5% of total sales.

“From the consumer point of view, especially with higher-priced items, it’s about the service in a boutique and the luxury experience. On the other hand, even when e-commerce is not driving sales, three-quarters of luxury purchases are driven by online touch points and then

the consumer goes to a store, so the whole proposition of the luxury experience begins online, and luxury shoppers are omni-channel shoppers. More than 40 per cent of the user journey starts on one platform and finishes on another – they’re on mobiles, tablets and desktops.”

And, he says, they are an increasingly discerning market, looking for something a little different. “It’s true that that the Chinese market, which is leading the whole sector, has changed a lot in the last few years. It was mainly led by branding, which is less the case now. They’re not looking for a specific product logo or monogram so much, and they’re looking for more niche brands now.”

Discreet personalisation that doesn’t transform a product but adds a little something that makes it your own – the lining of a jacket or pair of shoes, for instance, or the buttons or stitching – could be the middle ground that luxury brands and consumers want.

Marty says: “If it’s so different it’s not recognised by your peers, then you lose some of the value. However, if you personalise one product for someone it means it’s not industrialised, it’s created by craftsmanship as a single piece, and that can give it extra value.”







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## SECTION 9: THE GOLDEN RULES OF PERSONALISATION

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**The tyranny of choice – you hear it often discussed as an absolute, but really where that choice paralysis is so damaging is in the front-end of the experience, the landing strip for the consumer.**

Andrew Sirotnik  
Fluid Chief Creative Officer





# Take Aways

**The goal of personalisation is to inspire shoppers everywhere to express their individuality by creating a product just for them. The following six rules help brands and retailers get it right first time:**

## 1

### **The Goldilocks rule**

When it comes to choice, consumers want ‘not too little’ and ‘not too much’. To be faced with hundreds or thousands of options can be overwhelming, and the majority of people who want to personalise and customise say they would rather start with a design stimulus than a blank canvas. Actors, athletes, musicians and everyday people can inspire consumers with limited-edition designs and collections that can then be curated, adapted or customised by the individual.

## 2

### **Promise only what you can deliver**

If a product, colour or material is out of stock, don’t let shoppers select it. Don’t even let them see it! It’s essential that if customers assemble a collection of items – or customise a product – that they can buy it on the spot. If they can’t complete their transaction because one element of what they’ve fallen in love with is unavailable, they are likely to abandon their virtual shopping cart and reflect negatively on the whole experience.

## 3

### **Make it simple and fun to use**

Shopping online is time-consuming, especially when people are creating a look or an entire product, often using a small screen. Ensure you deliver a smooth, intuitive and seamless user experience that takes all the pain out of pushing buttons and screens and makes it fun. The platform also has to be easy to use regardless of the device consumers are using. Bear in mind the high – and growing – rates of e-commerce being conducted via mobile, and be careful to provide sufficient choice to inspire, but not so much that it requires endless screen-scrolling to see all the options. Simplicity is key.





## Take Aways

### 4

#### Make it real

It's vital that shoppers know exactly what they're going to get when they click 'buy', and too often in the past, configuration software relied on animation or other renderings that provided only an approximation of the final product. Photo-realistic imagery, in 3D, leaves no room for error. Shoppers can see precisely what their items look like, so there is delight – and no nasty surprises – when the box arrives at their door, and that keeps returns to a minimum. Realistic images help build excitement around a product as it's being designed, which makes browsers more likely to click 'buy', and they generate shareable content that is of huge value to the shopper and the brand.

### 5

#### Be everywhere

To maximise the success of a custom products programme, you have to make the experience you offer accessible from every device. Mobile is an increasingly important part of e-shopping, and an attractive, easy-to-use mobile app for all major operating systems is essential - but it's important not to exclude other devices. Consumers who shop across multiple digital channels have been shown to generate a 30% higher lifetime value to a business than those who stick with just one way of shopping. Be everywhere they are, with tools that suit the screens they're using.

### 6

#### Shout about it

And encourage your customers to do the same. The value of personalisation comes not just from immediate sales but also from the word-of-mouth share-ability of the experience and the content that is created. The ability to personalise products and collections should feature prominently on brands' and retailers' sites, and in marketing campaigns. Not all customers will opt to personalise, but they will see the brand as innovative and more desirable anyway. Extend personalisation options beyond your app or site, into rich media ads or even into physical stores. Then enable and encourage consumers to share their own designs, and those of others. Consider rewarding your most creative consumers, running contests and even crowd-sourcing designs or collections. Use online influencers such as YouTubers as well as more traditional media.



**70%**

global smartphone  
penetration rate by 2020\*

**50%**

proportion of web traffic coming from  
smartphones/tablets by the end of 2016\*\*

**2x**

bespoke or custom products are  
twice as likely to be shared online as  
in-stock products

**\$6.85**

is the average ROI on every  
\$1 spent on influencer media

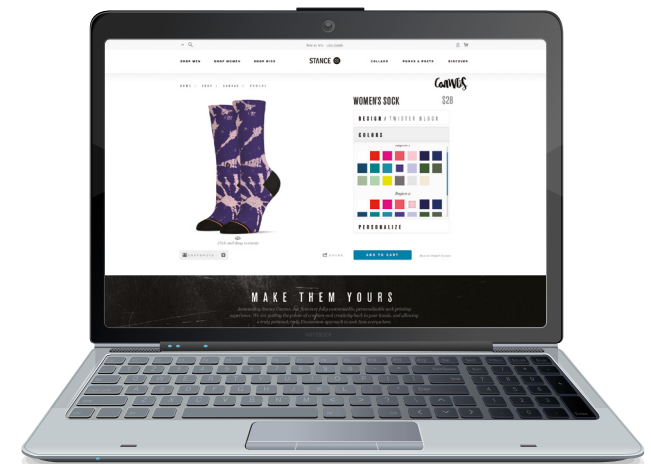
## Easy street

The range of socks available from Stance's customising zone, Canvas, is staggering. But Biggie McCubbins, Director of Interactive at Stance, explains that while the brand wants to give consumers the freedom to experiment, they also want to make it easy.

“We stand for creativity in everything, and we believe you can be uncommon and unique in everything you do. For us, offering custom products is about giving power to the consumer.”

Canvas features 26 basic sock designs, each featuring up to six customisable “zones”. Users can add their name and a two-digit number to the back of their socks, and two lines of text across the toes in up to 20 different colours. But creativity begins with selecting a starting style – or the style of one of Stance's celebrity partners, who include Willow Smith, Rihanna and James Harden – and go from there.

The end result is a simple, intuitive experience that enables freedom of expression, allowing users to create a unique product that reflects their individual style.





**We've woven the feel of the brand into the customisation experience. You truly feel like you're a designer – seeing all these amazing choices of colour and material, and the effect is that customers feel like they're an integral part of the design experience. There has to be a jolly good reason why somebody would do this and spend the time, so we wanted to create this experience and give somebody a good bit of fun, and this is essential to brand survival. There's a sense of fun and whimsy about creating your own shoe. We want to give our customers a really fun, unique experience.**

Emily Culp  
Chief Marketing Officer at Keds





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**SECTION 10:**  
**OPPORTUNITY IS KNOCKING**

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45%

of consumers have chosen, recommended or paid more for a brand that provides a personalised service or experience.

Source: Bain & Company, Forrester



Today's consumers have a huge feeling of individuality; you ignore that at your peril.

Adrian Stevens  
VP of Global e-Commerce, Wolverine Brands



**Personalisation is no gimmick; it's something that consumers increasingly expect. And the younger your consumers are, the more they expect it. Generation Z wants options; they want to co-create. Brands across a spectrum of categories are responding to that demand.**





**You can get a customised burrito from Chipotle, and a pair of QCut Jeans in one of 400 sizes. The proportion of footwear companies offering custom products has grown from 5% in 2006 to more than 20% now, and in sportswear, one-third of branded manufacturers offer customisation. The 2016 Dodge Viper will offer 50 million unique colour configurations.**

It's not just existing brands that are providing consumers with opportunities to personalise. A crowd-funding push on Indiegogo.com has generated just shy of \$1 million of backing for Shiftwear, technology that will allow footwear to be repeatedly customised with images and patterns sent from the owner's mobile phone.

A fully customised product with variable spec and a rainbow of colours might not be right for every brand, but there are more subtle ways to personalise products and shopping experiences - little details that can make a big difference to product differentiation and desirability. As well as generating sales and consumer engagement, personalisation also generates huge volumes of highly valuable data that can be used to inform future product lines and variations in offering in different geographical regions and in different seasons.

"Personalised experiences and the ability to customise for a bespoke feeling or experience will be ubiquitous," says Andrew Sirotnik, co-founder of Fluid and its chief creative officer.

He sees a day in the not-too-distant future where the information on a consumer's mobile device will contribute to an entirely tailored shopping experience, whether they're in a physical store or are browsing digitally. There will no longer be any delineation between regular and custom products; everything will be personalised. And that will lead to cross-sells and up-sells that generate the revenue that funds this bespoke experience.

"Instead of customisation being the lead, it's really going to play this very important supporting role because whatever you pick out - like if someone picks out a black sweater, with vertical ribbing and a V-neck, we might hook him up with a custom set of sneakers that have black as an accent colour, that have that same vertical striation in the upper or that have some detailing in the mid-sole that matches with his cuffs or something, he says. Probably neither of those products will actually exist and sit in a warehouse; they will all be manufactured to order. That's where it's going."





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**SECTION 11:**  
**MAKE A PLAN TO MAKE  
SHOPPING MORE PERSONAL –  
AND PROFITABLE**

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**Take the first step.  
It feels like the future,  
but to the consumer  
it's behind. The  
consumer expects it.**

Andrew Sirotnik  
Founder, Fluid



David Roth  
CEO, The Store WPP EMEA & Asia



The Store WPP and Fluid are working closely together to help brands and retailers turn personalisation into a reality for their clients.

Building retail experiences that are profitable, provide true differentiation and build loyalty is a key challenge for all brands. Fluid and WPP meet this challenge by offering best-in-class product customisation, which makes digital shopping uniquely personal, inspiring and profitable.

By combining Fluid's proven customisation platform with the retail and customer experience expertise of The Store WPP, we help companies create global customisation programs which set them apart from their competition while driving increased price premiums, loyalty and engagement.

Get in touch to find out more, and let us help you customise a personalisation program for your brand or client.



## About Fluid

Fluid creates commerce experiences and software that transform how people shop, driving conversion, satisfaction and brand loyalty. These results are delivered through Fluid's integrated suite of software solutions and their services team, made up of digital shopping experts in user experience, design, and strategy. Founded in 1999 with offices in San Francisco and New York, Fluid's customers include Airbnb, Google, Harman Kardon, Keen, Nautica, Target, The North Face, Oakley, PUMA, Reebok, Timberland, UGG and Vans.

For more information visit [www.fluid.com](http://www.fluid.com)

## Contacts at Fluid

**Derek Neff**

VP, Business Development

[dneff@fluid.com](mailto:dneff@fluid.com)

## About WPP

WPP is the world's largest communications services group, with billings of US\$70.5 billion and revenues of US\$16.5 billion. Through its operating companies, the Group provides a comprehensive range of advertising and marketing services, including advertising, media investment management, public relations, branding and identity, digital, promotion and market research. The company employs over 190,000 people, including associates, in more than 3,000 offices across 112 countries.

For more information visit [www.wpp.com](http://www.wpp.com)

## Contacts at WPP

**Igor Tolkachev**

The Store WPP

[Igor.Tolkachev@wpp.com](mailto:Igor.Tolkachev@wpp.com)

Special thanks to:

Jud Barr, JTB Consulting

Cecile Berger and Bertrand Marty, L'Agence Plus

Cal Bouchard, The North Face

Candace Kuss, Hill+Knowlton Strategies

Matt Schow, Generation Tux

Emily Smith, Added Value

Chris Haines, Director of Strategy, Fluid, Inc.

Written by Jo Bowman, RJB Media