Made to Order
An analysis of US consumer perception towards personalization
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Whether the goal is to create a sense of identity or to simply add a personal touch, the act of personalization is as much in demand as the products and experiences it helps make unique. YouGov’s latest report delivers robust insights on not just why brands should tap into personalization, but how and where brands can employ this offering to gain the upper hand in reaching consumers.

According to a study conducted in 2015, just one in six consumers have ever bought a personalized product or service. Since then, product personalization (the altering of a product to better suit a customer’s need or desire) has surged. YouGov’s latest research reveals that over the last three years, the personalization economy has seen an increase in demand from 17% to 26%. Now, at least one in four Americans say they have personalized a product either for themselves or someone else.

Interest in personalization is also high, suggesting that the process has staying power in the current economy. One in ten Americans (10%) consider personalization as a top interest and overall, nearly one in three (30%) express some interest in the offering.

This report will explore the different facets of personalization – from who these “personalizers” are in real life to the types of products or services people say they have personalized. It will also identify ways to reach a potential audience of those who are willing to pay more for the offering but have yet to take the personalization plunge.

Some industries fare better in implementing personalization than others...

% of Americans who have personalized in each of the industry categories

- **Apparel & Footwear**: 29%
- **Food & Beverages**: 29%
- **Technology Products**: 27%
- **Vacation and Travel Experiences**: 25%
- **Household Goods**: 22%
## Why personalize?

**The main reasons people say they personalize products and/or services**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>To design a product to meet a specific need (types of materials, shape, size, duration)</td>
</tr>
<tr>
<td>2</td>
<td>To identify a product as “belonging to me”</td>
</tr>
<tr>
<td>3</td>
<td>To design something just for fun</td>
</tr>
<tr>
<td>4</td>
<td>To feel pride in creating/designing something</td>
</tr>
<tr>
<td>5</td>
<td>To demonstrate creativity</td>
</tr>
<tr>
<td>6</td>
<td>To stand out from other people</td>
</tr>
</tbody>
</table>
People who have personalized a product are more likely than the general population to exhibit certain characteristics and retail attitudes.

Who they are most likely to be:

- 40% Millennials
- 30% Highly educated
- 31% $1,000 or more of monthly disposable income

These personality traits help personalizers stand out:

- Social
- Outgoing
- Optimistic
- Works the room at a party
- Gets energy by being in a group

Nearly half of this group (46%) say that they would be willing to pay more for a personalized product. Without price as a barrier to entry for this group, brands may be able to market personalization at a premium.

Personalizers are generally a younger group of consumers who tend to pursue higher education and have discretionary money to spend.

26% of Americans have personalized a product before.
Data on the online behaviors of this particular consumer segment is rich. Personalizers aren’t simply tech-savvy – they strive to be early adopters of technology. That may explain why they’re more likely to be a part of the ever-growing live streaming audience.

Live streaming may not be new, but fueled by social platforms like Instagram, Snapchat, Periscope, and Twitch, the format was reinvigorated by a surge of mobile users. Personalizers tend to use their smartphone (38%) most of all their devices and a majority (62%) say they watch live streams.

Given that personalizers tend to be social and that the heart of a live streaming channel is its community, the two seem to go hand-in-hand. It’s also an interactive platform that allows brands to get immediate, real-time data about their viewers.

Compared to people who have never personalized, personalizers are more likely frequenting movie theaters, listening to online radio and playing games on a console. A multi-platform approach may prove the best way to stay connected with these digital natives.
Part of the appeal of personalization is its ability to turn a product into a gift, allowing it to be both unique and special; this may be why 8% of Americans say they have personalized a product for someone else.

“Gifters” make up 28% of personalizers in the US and YouGov’s research reveals that 52% of this group say they are willing to pay for premium personalization.

Gifters tend to be women, and at least a third of the group are parents. They are conscientious consumers who look for information about the sources of their purchases, and are also likely to value speed and convenience over brand loyalty.

So while gifters are willing to pay more for personalization, they also want to ensure they get their money’s worth. Moreover, up-and-coming brands or small businesses that offer personalization have a good chance of resonating with this group if they emphasize the value of their products or services.
Defining audiences based on their behaviors and lifestyle can help uncover the ways and times to reach them. For gifters, that avenue comes more via music and in the form of radio stations.

**Media attitudes that this group skews towards compared to people who personalize for themselves**

- **I prefer listening to local radio stations**
  - 65%

- **I notice ads on the radio more than anywhere else**
  - 48%

- **I usually know all the new and emerging music artists**
  - 37%

- **Celebrity endorsements have an effect on my purchase decisions**
  - 33%

Radio may be the channel that offers the least resistance. Given the propensity of the group to listen to radio as well as keep up with new music and artists, brands can partner with artists for radio advertising. Such a partnership can be lucrative for the brand since a third of gifters say that celebrities have sway in what they decide to buy.

Knowing how and, especially, when to reach out to gifters can reveal the products, people, and moments they care about. Last Christmas, for example, gifters were likely to say that they bought and gifted toys, games, footwear, and apparel.

For the upcoming season of giving, brands now know that gifters will likely be buying gifts for children and can promote their personalization offerings to meet that demand.

**What gifters purchased as Christmas gifts in 2017 compared to people who personalize for themselves**

- **Toys & games**
  - 37% vs. 25%

- **Clothes & shoes**
  - 43% vs. 34%
Personalization can be as much about passion as it is about utility. That’s what one in ten Americans (10%) seem to suggest when they say that the offering is a top interest to them.

What makes this segment special, compared to people who actually personalized before, is that they tend to make less money but be more likely to report that they are in the market for travel services and apparel, two of the personalization economy’s thriving categories.

This group also tends to like both tech and sports. Brands hoping to connect with this segment should know that over half of this group are fans of basketball, especially of the NBA (55%) and Division 1 Women’s College Basketball (37%). A majority in this group (51%) also say they tend to search online for products they see on TV.

Knowing that fans of personalization have a high propensity for second-screening can help brands better target TV audiences.
Taking the plunge into personalization

THOSE WHO HAVEN’T PERSONALIZED A PRODUCT YET BUT ARE WILLING TO PAY A PREMIUM

So far, indicators point at an increasing demand for personalization, but are consumers willing to pay for it?

46% of personalizers are willing to pay for personalization

19% of those who have never personalized are willing to pay for personalization

The latter represents a segment of potential customers – those who haven’t taken the plunge in personalizing or customizing a product but express interest in doing so. This segment also represents a larger market of nearly 25 millions Americans who could potentially be converted into customers.

YouGov
What the world thinks
Taking the plunge into personalization
THE ATTITUDES BEHIND THIS CONSUMER SEGMENT

<table>
<thead>
<tr>
<th>Attitudes towards media</th>
<th>Attitudes towards retail</th>
</tr>
</thead>
<tbody>
<tr>
<td>I notice ads on the radio more than anywhere else</td>
<td>I like owning good quality products</td>
</tr>
<tr>
<td>52% vs. 37% Nat Rep</td>
<td>97% vs. 90% Nat Rep</td>
</tr>
<tr>
<td>I mainly use social media for entertainment and news content</td>
<td>I tend to choose premium products and services</td>
</tr>
<tr>
<td>68% vs. 53% Nat Rep</td>
<td>68% vs. 55% Nat Rep</td>
</tr>
<tr>
<td>I think it’s fair that we have to watch ads in exchange for free content</td>
<td>I don’t mind paying extra for quality</td>
</tr>
<tr>
<td>71% vs. 59% Nat Rep</td>
<td>87% vs. 79% Nat Rep</td>
</tr>
</tbody>
</table>

While this group seems accessible via radio ads and social media, the barrier that keeps them from personalizing a product may ultimately come down to a perception of quality.

Simply put, brands hoping to convert these potential customers must ensure that the product will meet the customer’s needs and expectations. Helping them take the plunge is less about convincing these people to spend more but positioning the personalization process as something that actually improves the product and makes it worth it.
From bespoke tailoring to embroidering a monogram onto a favorite shoe, personalization thrives in the fashion industry. America’s diverse consumers show off their sense of style in different ways, and fashion personalizers say they altered or customized their clothes for different reasons.

**Fashion and Personalization**

- **29%** of Americans have personalized apparel or footwear products.
- **18%** of fashion personalizers say they personalize their clothes to meet a specific need.
- **67%** of fashion personalizers say they would pay more to personalize apparel and footwear.
- **16%** of fashion personalizers say they personalize their clothes to identify a product as their own.
- **22%** of fashion personalizers say personalization is a TOP interest for them.
- **15%** of fashion personalizers say they personalize their clothes just for fun.
Some of the characteristics shared by this group seem at odds with one another – while they are driven by a desire to stay in the know with current fashion, they also like to stand out as individuals.

Personalization addresses this conflict and bridges the gap between the two opposing ideas. It’s an elegant solution that allows this group of consumers to wear what is trending but still give them a sense of personal identity.

The group also stands out for its fashion preferences. Staying up-to-date and trendy is the key driver behind what fashion personalizers choose to wear compared to other types of personalizers whose fashion picks are spurred by comfort, timeless clothing, and what they like the look of. Knowing what’s behind the decision-making of these fashion personalizers can help brands craft the right messaging.

### Behaviors that make this group unique from other personalizers

- I keep up with current fashion trends (53%) vs 30%
- I spend a lot on clothes (40%) vs 17%
- I like to stand out (44%) vs 23%
- I usually know all the new and emerging music artists (44%) vs 16%
- Say that NFL (25%) is their favorite sports league vs 10%

### Fashion preferences that make them distinct from other personalizers

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Apparel personalizers</th>
<th>Other personalizers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like to keep up-to-date with the latest trends and will only buy a few key pieces each season</td>
<td>16%</td>
<td>7%</td>
</tr>
<tr>
<td>I follow the latest fashion trends and buy clothes and shoes accordingly</td>
<td>15%</td>
<td>4%</td>
</tr>
<tr>
<td>I tend to buy whatever I like the look of in shops</td>
<td>27%</td>
<td>34%</td>
</tr>
<tr>
<td>I tend to stick with timeless, classic items</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>I tend to go for what’s comfortable</td>
<td>19%</td>
<td>30%</td>
</tr>
</tbody>
</table>

**WHO THESE FASHION PERSONALIZERS ARE**

**Behaviors that make this group unique from other personalizers**

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- Say that NFL (25%) is their favorite sports league vs 10%
The quarter of Americans that have personalized a travel service before are a valuable segment because all signs indicate that it is a top interest for them and that they’re willing to pay more for it. Given this, travel personalizers will likely look to personalize again.

**Travel and personalization**

- **25%** of Americans have personalized a vacation or travel service
- **29%** of travel personalizers say they personalize in general to meet a specific need
- **32%** of travel personalizers say personalization is a TOP interest for them
- **68%** of travel personalizers say they would pay more to personalize travel services
While personalization may be more popular among younger Americans, travel is the industry that draws older Americans towards the feature unlike any other. Of all the types of goods and services YouGov studied, Americans aged 50 or older were most likely to report personalizing a travel service or product compared to other surveyed industries.

What makes travel personalizers unique from other people who personalized in other industries? They tend to be older and hold conservative financial values that affect their retail decisions.

**Who they are likely to be**

- Earned a 4-year university or post-grad degree: 36%
- Earn $60,000 or more a year: 37%
- More than $1,000 of monthly disposable income: 40%

*Hispanics are more likely to have personalized in the travel industry (22%) than in any other (15%).*
Vacation and travel services
WHO THESE TRAVEL PERSONALIZERS ARE

People who personalize their travel seem to do so because they have an affinity for traveling. Their habits underscore this idea – many are likely to belong to an airline or hotel loyalty program that rewards traveling.

It’s important to keep in mind that while this group tends to be affluent, the price still has to be right before they decide to travel. They’re a money-conscious group for whom every trip should be special – and personalization can make that possible.
At the core of this report is a demand for personalization that shouldn’t be ignored. The personalization economy’s growth over the last few years marks two changes in the consumer mindset:

1. It’s clear that there’s a core group of consumers dissatisfied with standard, “one size fits all” products.

2. Consumer appetite for personalization, once whetted, continues to grow, due to high interest in personalization as a topic and a willingness to pay for personalization as a premium offering.

Other key takeaways from the report:

3. Consumers personalize different products and services for different reasons, meaning the call to action to personalize for apparel may differ greatly from that in the travel industry.

4. Certain personalizers, like those who gift personalized items, hold speed and convenience in higher esteem than brand loyalty.

5. Others, like those who say personalization is a top interest to them, can be reached through a television ad with a call to action to find out more online, as this group over-indexes in second screening.

6. Apparel and footwear personalizers tend to be younger and motivated as a consumer to keep up with the latest trends but still want to stand out.

7. Travel personalizers, on the other hand, tend to be older and affluent but more financially conservative as a group. Brands should position personalization as an enabler for both groups’ lifestyles and attitudes.

The personalization economy will continue to grow and shape what consumers expect from products and services. Whether a brand already offers personalization or is still testing the waters, looking to what makes the consumer tick is the key.

From an opportunity perspective, brands can get closer to their customers by using personalization as a transformative tool, one that turns a product into a shared experience using a brand’s resources and consumer’s sense of identity.
About YouGov

YouGov Plan & Track
YouGov’s Plan & Track service combines the detailed audience segmentation power of YouGov Profiles with the brand tracking capabilities of YouGov BrandIndex. The segmentation and media planning elements run on data collected in the YouGov Cube – our connected data vault which holds 250,000 variables, collected from over 200,000 YouGov panelists in the United States.

YouGov Fast Turnaround
YouGov Fast Turnaround provides survey results in as little as 24 hours at a fraction of the cost of an ad-hoc study. Our panelists are fully profiled from household income to health issues to their last major purchase, allowing clients to target just those people they want answers from. We also offer a range of specialist Fast Turnaround services, from international or generational to children or parents to business to business, and more.

YouGov Custom
YouGov Custom Research engagements leverage cutting-edge research and analytic techniques with an eye for assessing the economic impact of your actions. Our industry experts deliver you crucial insights and tools to plan and make strategic and tactical decisions while maintaining a focus on tangible outcomes. We have expertise across a variety of sectors, including consumer products and retail channels, financial services, luxury goods, technology, education, public policy, and more.