**From Mass Customization to Mass Personalization: A Perspective of the Fashion Industry in China**

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**Introduction** With the changing market landscape, Chinese fashion consumers increasingly demand personalized shopping experiences to meet their individualized needs (Ou, 2011).

Increasingly, mass customization (MC) has been implemented in different aspects of the Chinse fashion industry at different degrees and forms (Fan & Huang, 2007). Using pre-cut and pre-assembled modules, MC focuses on satisfying the needs of a group of similar consumers, instead of the needs of each individual consumer (Wang et al., 2017). Moreover, the advancement of internet-embedded innovations has given the rise of increasing consumers’ demand toward personalized experiences rather than simply customized products (Reiss & Koser, 2004). Unlike product-focused MC, mass personalization (MP) has great potential to satisfy diversified and unique consumer needs through not only personalized products but also personalized services and communication, hence, giving personalized experiences (Zhou et al., 2013). Considering the importance of meeting individual consumer’s needs, a significant transformation of the current business models is expected to be occurring to achieve MP. Therefore, through case analyses, this study aims to gain an insight of the development and application of MC to MP in the Chinese fashion industry, raising the level of debate on MP issues.

**Industrial (C2B) Models for Customization and Personalization** To better meet customers’ needs, companies have started shifting their focus from the traditional B2C (business-to-customer) mode to C2B (customer-to-business) mode, a production mode driven by customer needs (Zhou et al., 2016). There have been various innovation modes of C2B in practice (Song & Tang, 2017), representing different levels of MP. To identify the extent of MP implementation, it is important to understand the key elements and processes for C2B (Song & Tang, 2017). Zhang et al.(2019a) proposes that C2B models can facilitate MC and/or MP modes through the implementation of the following four components in an open and networked manner, including 1) accommodation of customers’ personalized demand (C), 2) manufacturing (M), 3) services (S), and 4) collaborative platform (P). Specifically, firms can transform their business model into C2B2M-MC or C2B2M-MP model. While the C2B2M-MC model meets part of customers’ customization demand via offering product modules for customers to choose from, the C2B2M-MP model, by implementing on-demand manufacturing systems and cyber-physical systems, allows customers to receive complete customization. Next, by implementing automation, intelligence, and networking technologies in the manufacturing process, a firm can develop C2M or CPM (customer platform-connecting manufacturing) models, enabling consumers to directly feed a manufacturer with information about their individual need (Zhang et al., 2019a). C2M and CPM models do not conceptually differ in that both bypass the intermediate unit between customers and manufacturers, but CPM provides additional auxiliary platforms, such as the demand monitoring platform. Further transformation can be made by supplementing C2M with open and networked services (S), proposed as C2M2S model by Zhang et al. (2019a).

**Approach** Based on the industrial C2B models proposed by Zhang et al. (2019a; 2019b), industrial case analyses were carried out in this study. The following criteria were applied in selecting companies: 1) has certain level of customization in their business model; 2) is large and well known in the Chinese fashion related industries; and 3) has promoted their customization approach in their marketing communications. Each case was analyzed against the existence of the following components: accommodation of customers’ personalized requirements (C), smart manufacturing by applying relevant industry 4.0 technologies (M), experiential service system to offer personalized services (S), and support platforms (P) to connect the C, M, S components (Zhang et al., 2019a; 2019b). Sources consulted to obtain secondary data for this study included trade magazines, company websites, and personal interactions and industry experiences.

**Results** Eight fashion related companies were identified for this study. While holding different positions on the MC to MP spectrum, most of these companies started their transition to C2M with first transforming their manufacturing and operation modes via applying digitalization technologies to implement flexible manufacturing. Specifically, Sinoer and Anta were in their early transition stages to MP, primarily exercising MC practices by adopting C2B2M-MC model in addition to their conventional B2C model. These enterprises have not established smart factories yet to meet individual customers’ requirements. The remaining six companies, with their smart factory capability, took more proactive initiatives by eliminating the mediators in the value chain by adopting C2M/CPM models. Specifically, Bosideng Group, a down clothing company, strategically chose to partner with existing e-commerce platforms such as JD.com and Biyao.com to utilize their C2M platforms. Another group of innovative fashion enterprise turned their attention to industry 4.0 technologies to further connect and transform their various operations via developing networked industrial internet-based platforms on their own. Particularly, key players in the Chinese men’s wear industry (Saint Angelo, Youngor, Red Collar, Cotte Yolan), which have already established their own smart factories, have transitioned to the stage close to CPM to enhance interconnection and collaboration between stakeholders via the use of networking technologies (e.g., IoT and RFID). However, service components were found yet to be connected to their open and networked platform. Most enterprises primarily focused on customizing physical products by organizing open flexible manufacturing according to customers’ needs instead of personalizing experiences through web-based interactive services and communications (e.g., recommendation and consulting services). Consistently, although C2M2S model is the most advanced industrial model for customization and personalization (Zhang et al., 2019a), among cases reviewed, only YBREN was found to establish their own service ecosystem, seamlessly connecting several service portals and service providers.

**Conclusion** Through the exploration and identification of key C2B models via case analyses, this study confirmed the industrial landing of the C2B models that feature different extent of transformation to MC and MP in the Chinese fashion industry. Managerially, the results of this paper can be used as a reference for Chinese fashion enterprises to design, set, and carry out the C2B model of customization and personalization to better meet the requirement of individual customers and demand for personalized experiences.

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