

BESPOKE SURVEYS

FAST FASHION VOLUME 4

1,250+ US Consumers, Balanced to Census



CHECK BREAKDOWN:

TREND CHECKS

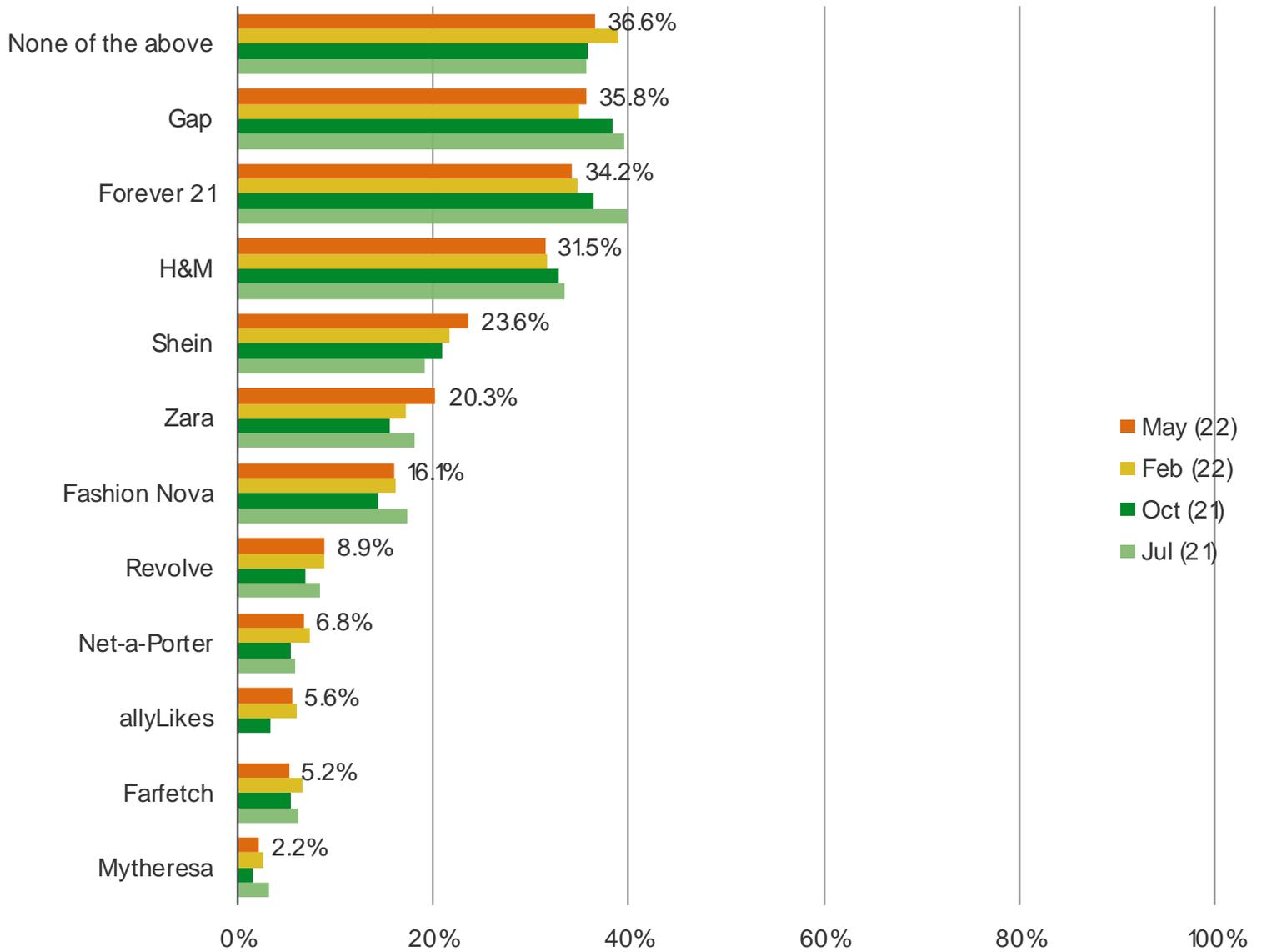
Key Takeaways:

- Shein awareness increased once more sequentially.
- The share of consumers who have shopped Shein increased once more q/q.
- Shein's NPS ranks ahead of H&M, Forever 21, and Gap in our trackers.
- Forever 21 and H&M customers are the most likely to say they are likely to be Shein customers out of the list of companies that we showed consumers.

Fast Fashion

ARE YOU FAMILIAR WITH ANY OF THE FOLLOWING SITES/APPS? (SELECT ALL THAT APPLY)

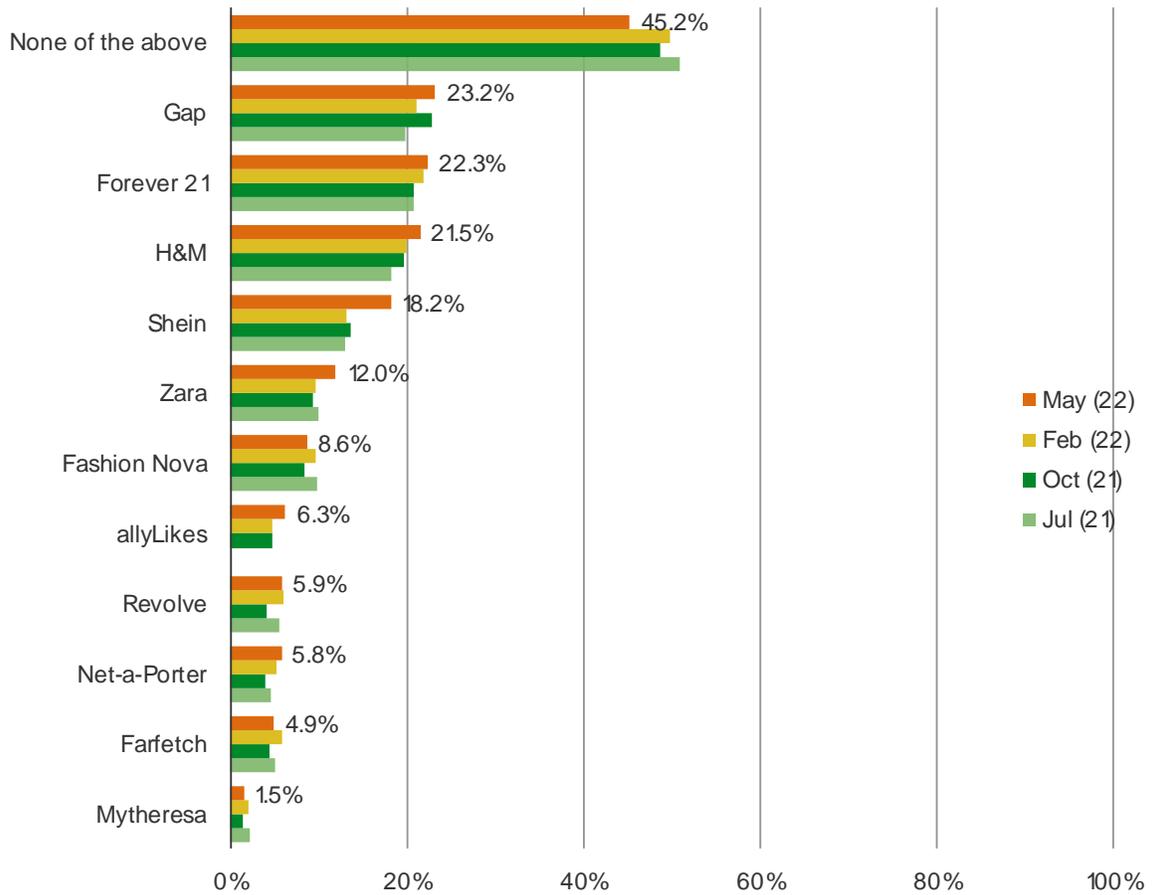
Posed to all respondents.



Fast Fashion

HAVE YOU EVER MADE A PURCHASE FROM ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents.



Data Cross-Tab

Respondents Who Have Purchased From Each of The Following

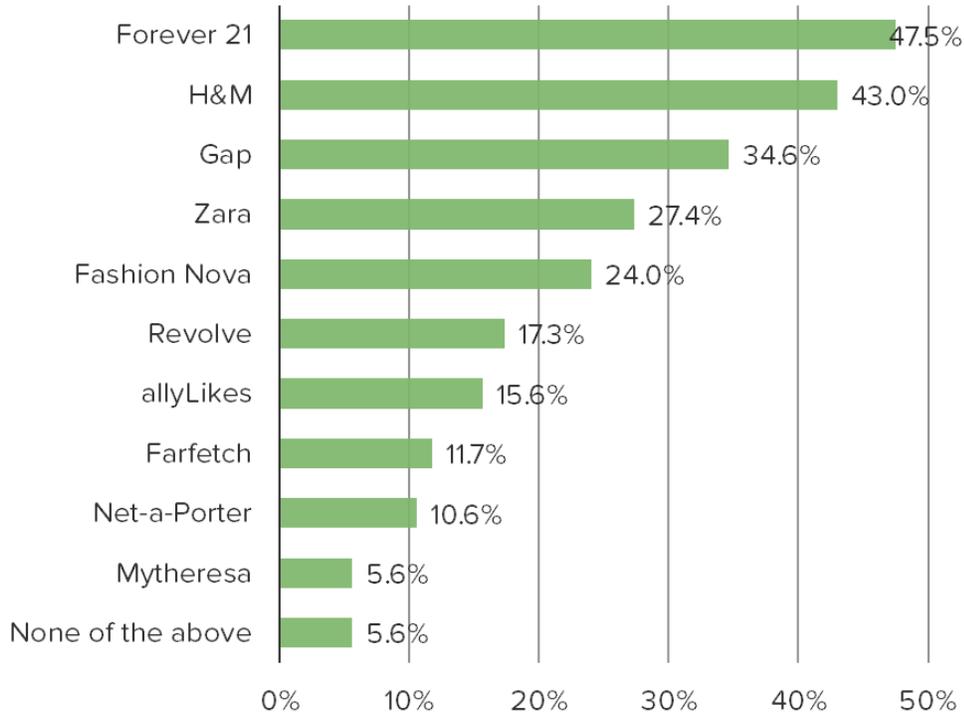
Also have made a purchase from...	Shein	Farfetch	Revolve	H&M	Zara	Gap	Forever 21	Fashion Nova	Net-a-Porter	allyLikes	Mytheresa	N=
Shein		10.6%	12.3%	38.6%	19.5%	35.2%	44.5%	23.3%	11.0%	14.8%	5.5%	236
Farfetch	39.1%		35.9%	37.5%	40.6%	40.6%	34.4%	31.3%	28.1%	39.1%	18.8%	64
Revolve	38.2%	30.3%		47.4%	39.5%	38.2%	35.5%	34.2%	31.6%	34.2%	17.1%	76
H&M	32.6%	8.6%	12.9%		27.6%	45.2%	49.1%	20.1%	10.8%	12.5%	4.7%	279
Zara	29.7%	16.8%	19.4%	49.7%		42.6%	42.6%	25.2%	14.8%	18.1%	10.3%	155
Gap	27.6%	8.6%	9.6%	41.9%	21.9%		42.9%	15.0%	9.3%	9.3%	3.3%	301
Forever 21	36.3%	7.6%	9.3%	47.4%	22.8%	44.6%		19.4%	8.3%	11.1%	4.8%	289
Fashion Nova	49.1%	17.9%	23.2%	50.0%	34.8%	40.2%	50.0%		19.6%	25.9%	11.6%	112
Net-a-Porter	34.7%	24.0%	32.0%	40.0%	30.7%	37.3%	32.0%	29.3%		29.3%	17.3%	75
allyLikes	43.2%	30.9%	32.1%	43.2%	34.6%	34.6%	39.5%	35.8%	27.2%		14.8%	81
Mytheresa	65.0%	60.0%	65.0%	65.0%	80.0%	50.0%	70.0%	65.0%	65.0%	60.0%		20

Fast Fashion

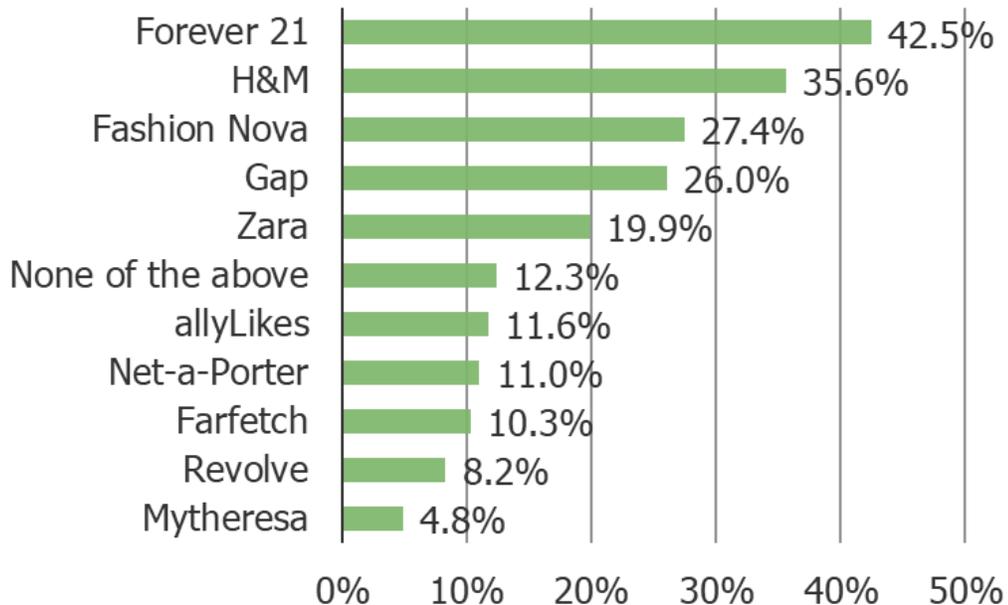
HAVE YOU EVER MADE A PURCHASE FROM ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Data Filter: Respondents who said they are likely or very likely to purchase from Shein in the future.

May 2022



October 2021



Fast Fashion

DEMOGRAPHICS: RESPONDENTS WHO HAVE PURCHASED FROM EACH OF THE FOLLOWING

May 2022

	Shein	Farfetch	Revolve	H&M	Zara	Gap	Forever 21	Fashion Nova	Net-a-Porter	allyLikes	Mytheresa
18 to 24	33.1%	4.7%	7.0%	32.6%	11.6%	22.1%	36.6%	12.2%	8.1%	7.6%	2.3%
25 to 34	32.3%	8.7%	10.0%	34.1%	24.0%	25.8%	32.3%	15.7%	11.8%	12.2%	4.4%
35 to 44	21.5%	12.3%	12.8%	24.7%	18.7%	27.4%	29.2%	15.5%	10.1%	11.9%	1.8%
45 to 54	18.6%	3.4%	4.2%	20.3%	11.4%	26.2%	20.3%	7.6%	3.8%	5.1%	0.4%
55 to 64	4.4%	0.5%	0.5%	10.8%	2.5%	23.5%	9.8%	1.0%	1.0%	1.0%	0.5%
65 to 74	0.8%	0.0%	0.0%	10.9%	0.8%	13.2%	10.1%	0.0%	0.0%	0.0%	0.0%
75 or older	3.0%	0.0%	1.0%	6.9%	5.0%	14.9%	6.9%	0.0%	1.0%	0.0%	0.0%

	Shein	Farfetch	Revolve	H&M	Zara	Gap	Forever 21	Fashion Nova	Net-a-Porter	allyLikes	Mytheresa
\$0-\$24,999	17.3%	0.8%	0.8%	13.3%	3.9%	14.9%	19.2%	3.9%	2.0%	2.8%	0.8%
\$25,000-\$49,999	18.0%	1.6%	2.7%	15.9%	6.1%	19.6%	21.2%	5.8%	2.9%	3.2%	0.5%
\$50,000-\$74,999	15.9%	2.9%	3.4%	19.7%	8.8%	22.6%	20.5%	6.7%	3.4%	2.5%	0.8%
\$75,000-\$99,999	18.0%	6.0%	5.3%	30.7%	18.0%	27.3%	25.3%	8.7%	6.0%	6.0%	1.3%
\$100,000-\$124,999	17.0%	8.0%	12.5%	25.0%	19.6%	26.8%	25.9%	10.7%	10.7%	17.9%	0.9%
\$125,000-\$149,999	25.8%	8.1%	22.6%	33.9%	29.0%	38.7%	30.7%	16.1%	17.7%	11.3%	8.1%
\$150,000-\$174,999	16.7%	31.0%	23.8%	40.5%	40.5%	47.6%	21.4%	28.6%	19.1%	16.7%	4.8%
\$175,000-\$199,999	20.0%	20.0%	24.0%	52.0%	28.0%	28.0%	20.0%	24.0%	20.0%	12.0%	8.0%
\$200,000 and up	38.7%	22.6%	9.7%	35.5%	32.3%	35.5%	32.3%	35.5%	19.4%	29.0%	6.5%

October 2021

	Shein	Farfetch	Revolve	H&M	Zara	Gap	Forever 21	Fashion Nova	Net-a-Porter	allyLikes	Mytheresa
18 to 24	28.0%	5.1%	5.1%	29.1%	12.6%	21.7%	34.3%	16.6%	7.4%	5.7%	4.0%
25 to 34	25.2%	9.8%	7.7%	28.6%	18.4%	24.8%	33.8%	17.5%	9.0%	11.1%	3.0%
35 to 44	13.1%	6.1%	6.1%	22.3%	11.8%	24.5%	23.1%	10.0%	6.6%	7.4%	0.9%
45 to 54	12.6%	5.3%	4.9%	20.7%	7.7%	23.5%	17.0%	6.9%	1.2%	3.6%	1.6%
55 to 64	3.9%	0.0%	1.4%	11.1%	3.9%	21.2%	11.1%	1.0%	1.0%	0.5%	0.0%
65 to 74	2.2%	0.0%	0.0%	7.4%	1.5%	21.5%	11.1%	0.0%	0.0%	0.0%	0.0%
75 or older	2.0%	1.0%	0.0%	6.9%	2.9%	18.6%	4.9%	1.0%	0.0%	1.0%	0.0%

	Shein	Farfetch	Revolve	H&M	Zara	Gap	Forever 21	Fashion Nova	Net-a-Porter	allyLikes	Mytheresa
\$0-\$24,999	10.4%	1.9%	1.6%	10.4%	2.2%	15.1%	17.9%	4.4%	1.3%	2.5%	0.3%
\$25,000-\$49,999	14.5%	3.9%	3.0%	19.5%	6.2%	20.2%	20.6%	8.0%	3.7%	2.8%	1.6%
\$50,000-\$74,999	13.7%	4.6%	3.4%	22.1%	8.4%	23.3%	22.1%	8.4%	3.1%	3.1%	0.0%
\$75,000-\$99,999	8.6%	4.3%	5.1%	25.6%	18.0%	38.5%	23.1%	6.0%	4.3%	5.1%	0.9%
\$100,000-\$124,999	18.7%	14.3%	9.9%	25.3%	19.8%	30.8%	20.9%	19.8%	8.8%	13.2%	4.4%
\$125,000-\$149,999	17.0%	8.5%	8.5%	23.4%	23.4%	27.7%	21.3%	10.6%	8.5%	8.5%	8.5%
\$150,000-\$174,999	28.0%	0.0%	16.0%	40.0%	28.0%	32.0%	24.0%	24.0%	16.0%	12.0%	8.0%
\$175,000-\$199,999	17.4%	4.4%	4.4%	30.4%	30.4%	26.1%	21.7%	17.4%	13.0%	21.7%	0.0%
\$200,000 and up	33.3%	13.3%	33.3%	26.7%	33.3%	53.3%	26.7%	13.3%	13.3%	40.0%	6.7%

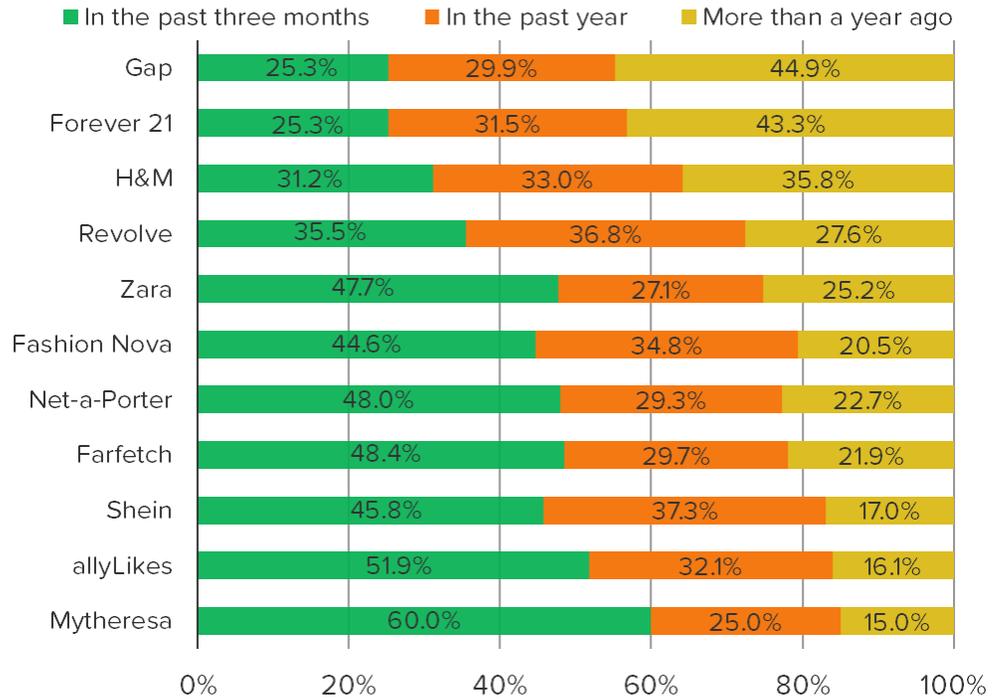
Fast Fashion

WHEN DID YOU MOST RECENTLY MAKE A PURCHASE FROM THE FOLLOWING?

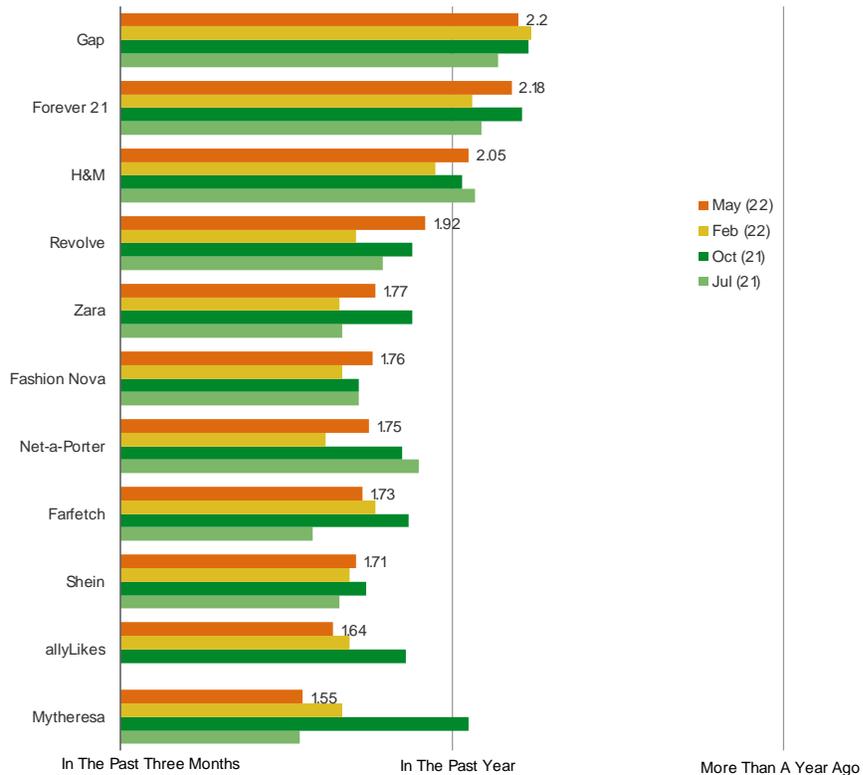
Posed to respondents who said they have purchased from each of the following.

May 2022

	N=
Shein	236
Farfetch	64
Revolve	76
H&M	279
Zara	155
Gap	301
Forever 21	289
Fashion Nova	112
Net-a-Porter	75
allyLikes	81
Mytheresa	20



Time Series



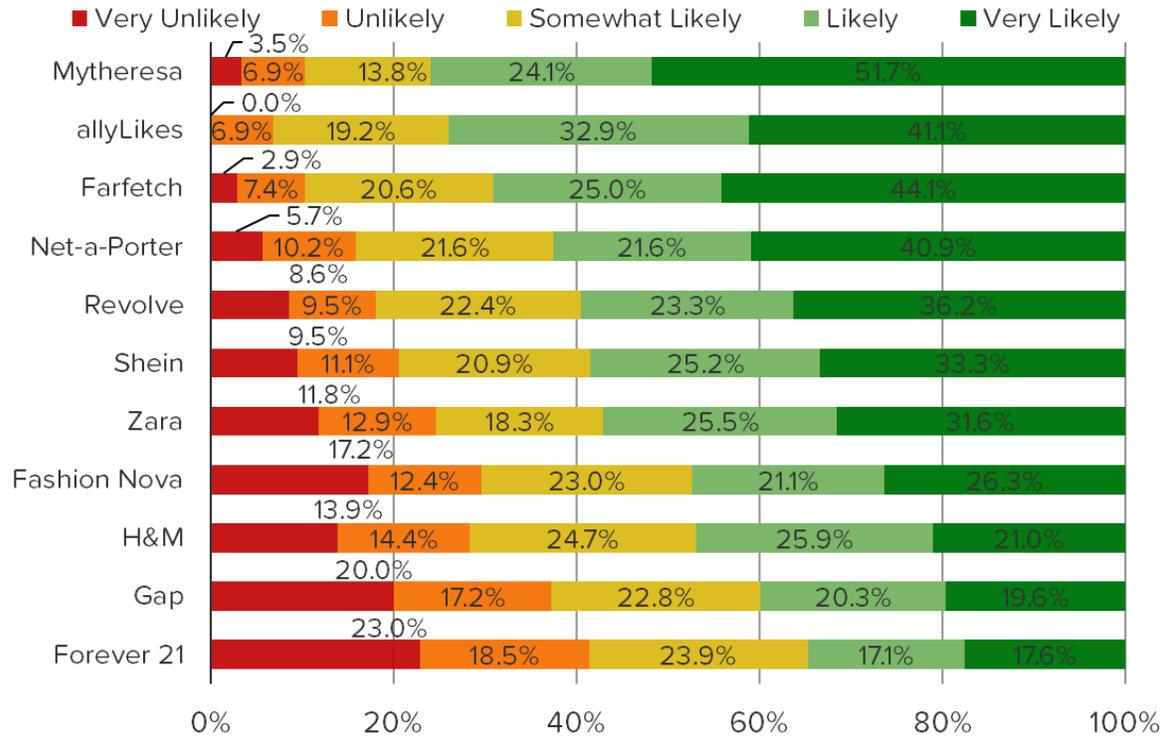
Fast Fashion

HOW LIKELY ARE YOU TO PURCHASE FROM THE FOLLOWING IN THE FUTURE?

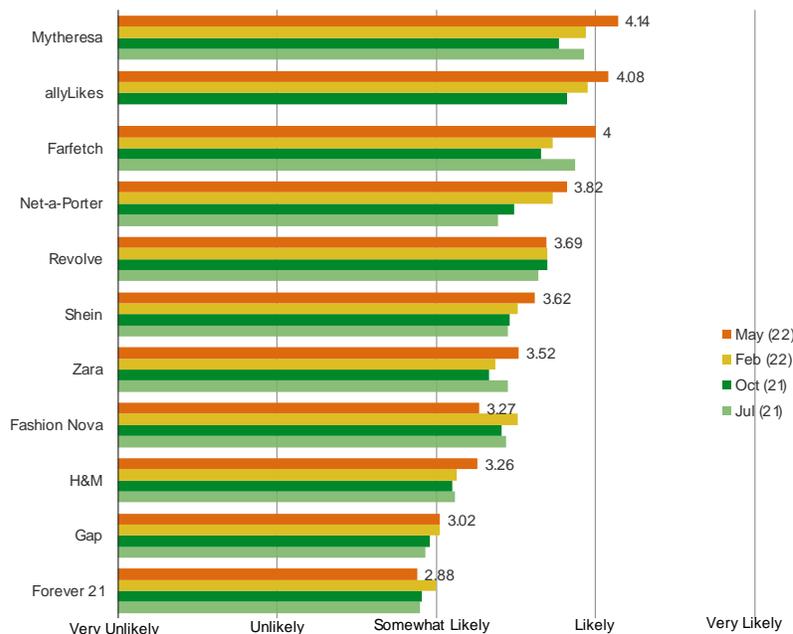
Posed to respondents who said they are familiar with each of the following.

May 2022

	N=
Shein	306
Farfetch	68
Revolve	116
H&M	409
Zara	263
Gap	464
Forever 21	444
Fashion Nova	209
Net-a-Porter	88
allyLikes	73
Mytheresa	29



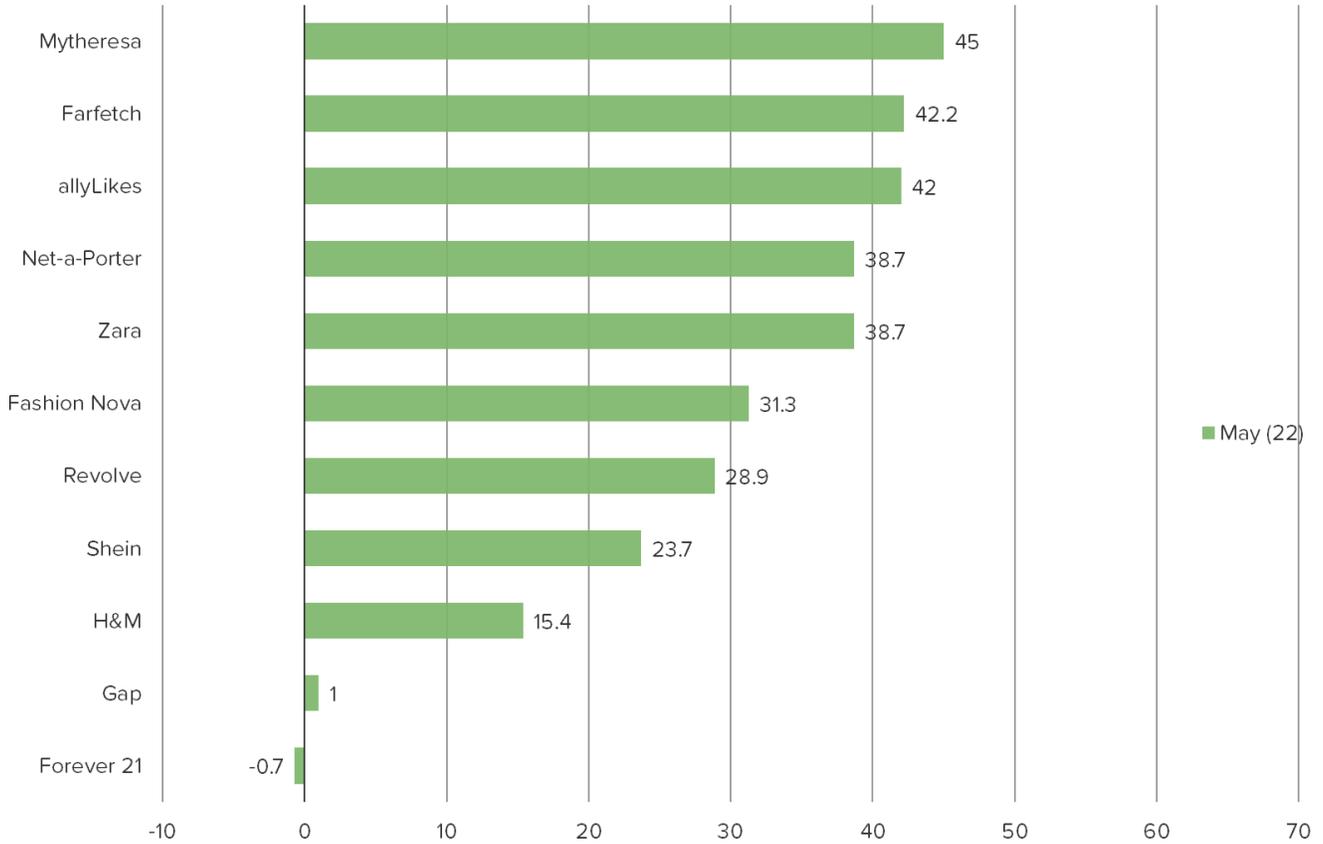
Time Series



Fast Fashion

HOW LIKELY ARE YOU TO RECOMMEND THE FOLLOWING TO A FRIEND OR COLLEAGUE?

Posed to respondents who said they have made a purchase from the following.



	N=
Shein	236
Farfetch	64
Revolve	76
H&M	279
Zara	155
Gap	301
Forever 21	289
Fashion Nova	112
Net-a-Porter	75
allyLikes	81
Mytheresa	20