

Reinventing Ultra-Fast Fashion: Strategic Growth Recommendations for SHEIN's Sustainable Brand Development

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Abstract

Fast fashion retail faces unprecedented challenges in balancing rapid growth with increasing consumer demands for sustainability, quality, and ethical practices. SHEIN, despite being the largest fast fashion brand in the United States, experienced a decline in valuation due to shifting consumer priorities toward transparency and responsibility. This paper explores how SHEIN can evolve from a pure-play fast fashion retailer into a sustainable, premium-accessible brand through primary and secondary research analysis. A mixed-methods approach combining survey data from respondents and sentiment analysis of 1250 consumer reviews across seven digital platforms reveals three distinct consumer segments, identifying critical pain points including quality concerns and skepticism on sustainability. The research proposes a three-tiered strategic framework—namely the “SHEIN Evolution Pyramid”—encompassing operational excellence and sustainability (foundation), strategic premiumization and revenue diversification (differentiation), and omnichannel expansion and brand elevation (experience). Data-driven strategic recommendations provide a roadmap for maintaining cost leadership while addressing consumer trust, offering insights applicable to the broader challenge of the fast fashion industry's transformation.

Keywords

Brand Strategy, Marketing Management, Fast Fashion, Premiumization, Omnichannel Strategy, Consumer Behavior, Sustainability

1. Introduction

Fast fashion retailers face unprecedented challenges in balancing high growth with

increased pressures on sustainability and ethical practices. As the largest fast fashion brand in the United States with a 50% market share doubled since March 2020, SHEIN illustrates both the rapid opportunities and challenges in the industry. Transforming a small Chinese retailer into a global powerhouse valued at \$100 billion (Gottfried et al., 2022), SHEIN revolutionized the field of fashion retailing with quick trend predictions, rapid production cycles, and ultra-affordable pricing. Unlike traditional retailers such as H&M and Zara, which typically operate with longer lead times of three to six months to design and manufacture new collections, SHEIN has set a new industry benchmark by keeping pace with constantly changing consumer demands that showcase a fundamental shift in the way young consumers discover and purchase fashion.

Founded in 2008, SHEIN disrupted traditional models by combining artificial intelligence and big data analytics with social media integration and agile supply chains. The company's revenues match the combined total of competitors Zara and H&M (The Economist, 2024). With over 50 million active users worldwide, SHEIN uploads 6000 new items daily, significantly higher than H&M's 25,000 annual designs (McKinsey & Company et al., 2022). While traditional retailers take 3 - 6 months from design to delivery, SHEIN achieves this in 7 - 10 days. This digital-native approach democratizes fashion by making trends affordable and personalized, resonating strongly with Gen Z and millennial consumers across 150+ countries.

However, success brings heightened scrutiny regarding environmental impact, product quality, and ethical practices, hindering SHEIN's brand image and long-term growth. The retail landscape now demands a balance between growth, sustainability, and consumer trust. SHEIN's valuation declined from \$100 billion in 2022 to \$64 billion in 2023 (Levingston et al., 2024), reflecting shifted consumer focus toward transparency and sustainability.

This paper examines how SHEIN can transform from a pure-play fast fashion retailer into a beacon of accessible, sustainable, and premium fashion. Through comprehensive primary and secondary research analysis, this paper proposes three strategic repositioning suggestions: implementing circular economy models and transparent sourcing, developing a premium tier without sacrificing affordability, and strategic use of physical retail to increase customer trust.

2. Literature Review

To address rising concerns regarding sustainability and social impact and ensure SHEIN's long-term growth, existing literature on three key areas is examined: sustainability in fast fashion, premiumization in retail, and omnichannel customer experience. This section synthesizes research on these themes to contextualize SHEIN's current market position and provide a foundation for strategic recommendation at the core of this research.

2.1. Sustainability in Fast Fashion

Fletcher (2014) demonstrates that the fast fashion model is inherently unsustain-

able due to its priority in speed and volume over long-term ecological and social considerations. The current fast fashion model emphasizes overproduction to meet changing consumer wants for the latest trends. Disposable garments designed for short-term use promote a “wear once and discard” culture that derails from environmental sustainability goals. Additionally, fast fashion supply chains are reliant on cheap labor and practices with high resource intensity. Fletcher also highlights the social implications of fast fashion’s unsustainable supply chain, which often exploits low-wage labor in developing countries, as illustrated in **Figure 1**.

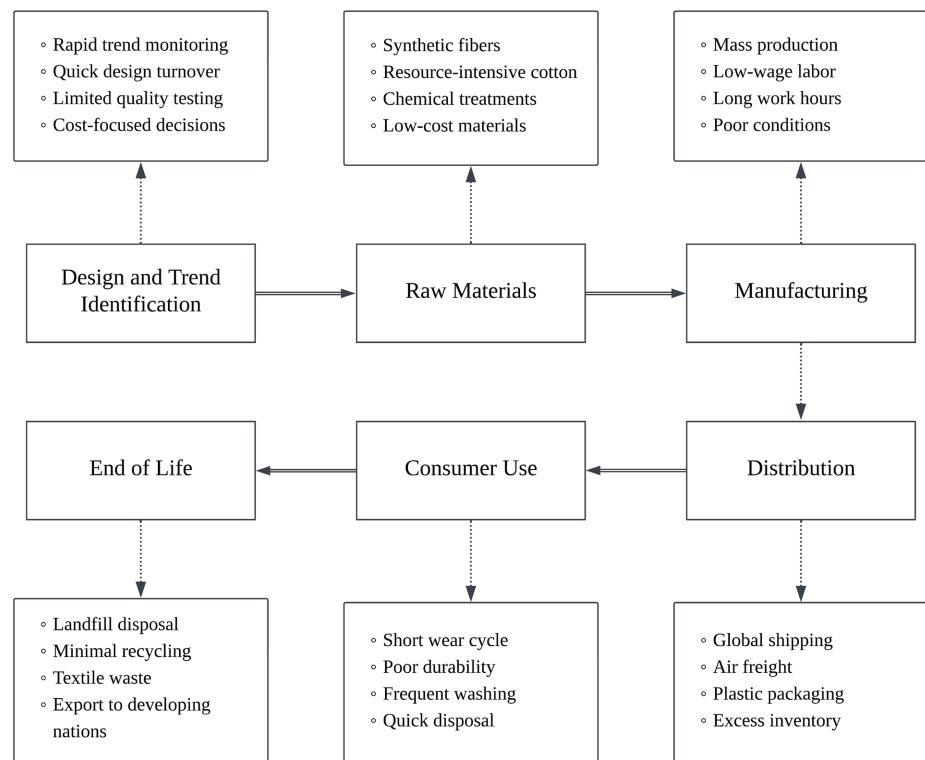


Figure 1. Lifecycle of a fast fashion product (a typical example of a linear economy model, where profitability and mass-production are prioritized over sustainable growth).

Fast fashion brands like Zara and H&M have shown efforts to integrate circular economy models to address consumer concerns, with sustainability being a rising issue. According to [Brydges \(2021\)](#), the circular economy (CE) has emerged as a key framework aiming to maximize resource efficiency and minimize waste via closed-loop systems in fast fashion. Current CE initiatives only tackle the waste stage rather than addressing the full supply chain, where social sustainability, e.g., worker rights, is often overlooked in CE programs. H&M’s garment takeback scheme is referenced as a pioneering sustainability initiative in Swedish fashion and is used as a benchmark comparison for other brands. Similarly, Zara’s “Join Life” collection and H&M’s “Conscious” line demonstrate how traditional retailers are pushing eco-friendly product lines to improve brand perception and at-

tract environmentally conscious consumers.

However, critics argue that such initiatives often amount to greenwashing, as brands may misrepresent their environmental efforts while continuing unsustainable practices at scale (Claudio, 2007). Greenwashing acts as a loophole for companies to project environmental responsibility without making substantial reforms to systematic issues, such as overproduction and environmental labor. Meaningful investments in sustainable materials, ethical labor, and waste reduction often contradict SHEIN's strengths in low prices and high turnover, which act as a critical part of their success.

2.2. Premiumization in Retail

Premiumization is a strong strategy for mass-market retailing to diversify revenue streams and attract higher-value customers that respond to evolving customer expectations. According to Kapferer and Bastien (2009), premium brands rely on exclusivity, quality, and scarcity to create aspirational value for consumers. Brands create exclusivity through limited-edition collections, selective distribution channels, and storytelling. Aligning a brand's positioning with ethical values not only strengthens brand loyalty but also elevates products as responsible and influential. Furthermore, the authors emphasize that premiumization is built on the perceived value—pricing is aligned with quality and the brand's narrative to maintain its positioning as a leader.

Building on this, Cachon and Swinney's (2011) discussion of operational dynamics and consumer behavior within fast fashion highlights how scarcity, speed, and exclusivity influence consumer perceptions in premiumizing retail. Limited inventory and high product turnover create a sense of urgency among customers. This model mirrors premiumization strategies, where exclusive collections enhance the perceived value of products by making them harder to obtain. Brands that leverage their high trend-responsiveness in premium fast fashion collections make consumers align uprising trends with exclusivity, similar to the phenomenon where consumers make impulse purchases due to the fear of missing out on limited products. Fast fashion firms achieve profitability by reducing costs while maintaining high perceived value through niche designs and quick replenishment. The speed of production and distribution in fast fashion can mimic the exclusivity associated with premium brands that capitalize on their "freshness" and "uniqueness".

Finally, Silverstein and Fiske's (2003) "*Luxury for the Masses*" explores the concept of new luxury and introduces the concept of "masstige" (mass prestige). Premium brands create accessible luxury through collaborations with mass-market retailers. This is a response to the shift in middle-market consumers with disposable incomes, who are willing to pay premiums of 20% to 200% for products that offer superior design and emotional engagement. Premiumization blurs the lines between mass-market and traditional luxury goods, where new-luxury goods offer aspirational luxury while being accessible in price. Collaborating brands craft nar-

ratives that connect consumers' aspirations, creating products that feel special and unique. New luxury brands generate profitability by achieving high sales volumes while maintaining premium pricing. This allows premium brands to expand their reach without diluting their image and mass-market retailers to enhance customer trust and brand perception. By collaborating with well-known designers or premium brands, SHEIN could craft narratives that connect with consumers' aspirations while maintaining high sales volumes, similar to the success of other "mass-tige" collaborations in the retail industry.

2.3. Omnichannel Retail and Consumer Trust

Integrating physical retail into e-commerce has proven effective in building consumer trust and loyalty. Studies by Brynjolfsson et al. (2013) demonstrate that blending online and offline channels creates a seamless shopping experience, mitigating concerns with product quality and improving customer retention. Shoppers expect personalization and seamless transition between online and offline experiences. The studies observe that consumers may research online, purchase in-store, or vice versa, showcasing a need for retailers to offer flexibility. Leveraging data from multiple channels can enhance personalized recommendations, also shifting transactional relationships to creating a concierge model that emphasizes customer engagement and service. Instead of serving as the only transactional locations, stores are becoming spaces for product discovery and fulfillment services (e.g., order pickups or returns).

SHEIN's high reliance on its online model also brings a disadvantage to engaging customers who prefer tactile shopping experiences, particularly those who have quality concerns about its products. Rigby (2011) introduces omnichannel retailing as the gateway to encourage customer interaction across diverse channels, ultimately fostering trust by offering consistent and convenient shopping experiences, where consumers feel confident that the brand values their time and preferences. Pop-up stores and flagship locations in high-traffic areas can mitigate quality concerns and improve brand perception. Physical stores, often seen as liabilities for e-commerce brands, can be transformed into assets to complement digital retailing. Stores should provide unique engaging and immersive storytelling to establish trust as customers feel more confident in the brand's transparency. Challenges in implementing this change lie in significant operational shifts, hiring new talent, and implementing test-and-learn methodologies.

Regardless of SHEIN's efforts in attempting omnichannel strategies, its efforts remain limited compared to traditional retailers. The brand has experimented with pop-ups in popular shopping districts, directly presenting products to customers to reduce the uncertainty associated with fully online shopping (Olson, 2023). These stores also serve as fulfillment hubs that offer services such as in-store returns and order pickups. However, they lack a consistent framework for transparent guidelines on in-store pricing or personalized services. SHEIN must develop more cohesive policies that ensure consistency across channels while scal-

ing its physical presence to complement its digital environment.

3. Methodology

This study explores customer perceptions and values regarding SHEIN through a mixed-methods research design combining primary survey data and a sentiment analysis to understand consumer trends for brand recommendations. For quantitative data collection, a survey-based method was employed to gather data from a diverse group of respondents acquainted with SHEIN. For qualitative data collection, a sentiment analysis was performed to obtain insights into deeper attitudes surrounding the brand. Together, these methods provide both numerical data and a nuanced understanding of consumer sentiment.

3.1. Quantitative Survey

3.1.1. Survey Design

An online survey was created to explore consumer behaviors, brand perceptions, and concerns about sustainability, quality, and ethics. The survey included 20 questions divided into five sections: demographics, brand perceptions, behavior, sustainability concerns, and suggestions for improvement. Open-ended responses were included to capture additional context. Aligning with [Creswell's \(1994\)](#) mixed methods design, quantitative and qualitative responses were collected simultaneously in the survey, analyzed separately, and then integrated for interpretation.

3.1.2. Sampling Strategy and Participants Demographics

A non-probability convenience sampling method was used to ensure the representation of SHEIN consumers. The survey was distributed via social media, email, and forums, targeting participants from the United States aged 18 and older. Responses were anonymized to encourage honesty. Data collection occurred over three weeks in March 2025.

While the sample size ($n = 81$) is modest, it exceeds the minimum threshold for statistical analysis of key relationships and provides sufficient information for detecting medium to large effects ([Cohen, 1992](#)). The average completion time was approximately 7 minutes.

3.1.3. Survey Instrument Development

The survey instrument contained 27 questions across five sections:

- 1) Demographic information;
- 2) Shopping behaviors and preferences;
- 3) Perceptions and attitudes toward SHEIN;
- 4) Premium preferences;
- 5) Open-ended feedback.

Question formats included multiple-choice, Likert-scale ratings, multi-select options, and open-ended text responses. A pilot test ($n = 5$) ensured clarity and efficiency, leading to minor revisions.

3.1.4. Analytical Methods

Quantitative data analysis was conducted with descriptive statistics, including frequency distributions, measures of central tendency, and dispersion. Chi-square tests of independence were employed to examine relationships between categorical variables with statistical significance set at $p < 0.05$, along with Spearman rank correlation and Kruskal-Wallis tests to compare responses across demographic groups. Open-ended questions were analyzed using a thematic analysis approach based on [Braun and Clarke's \(2006\)](#) six-step framework. A five-category sentiment classification system is used to quantify emotional valence.

3.1.5. Ethical Considerations

Participants provided informed consent, and no personal information was collected. All data was stored securely and accessed only by the research team.

3.2. Sentiment Analysis

3.2.1. Research Design

The qualitative component involves conducting a sentiment analysis of consumer opinions on SHEIN from social media and online review platforms. The consumer sentiment analysis combines quantitative review with qualitative keyword extraction to analyze consumer perceptions of SHEIN across digital platforms, following a sequential explanatory strategy introduced by [Creswell and Plano Clark \(2018\)](#).

Purposive sampling was used to collect a total of 1250 reviews and social media posts about SHEIN from seven different platforms: Reddit ($n = 200$), YouTube ($n = 200$), TikTok ($n = 200$), AliExpress ($n = 200$), Amazon ($n = 200$), and Instagram ($n = 150$), following the methodological recommendations of Kozniets for digital research ([Kozniets, 2009](#)).

3.2.2. Data Preparation

To quantify emotional attitudes toward SHEIN using unstructured textual data with a focus on polarity and intensity, preprocessing prepares data in the correct format to maximize efficiency for sentiment classification. Misspellings will be corrected via a spell-check function. To normalize the textual data, words will be lemmatized, and contractions will be expanded. A custom lexicon for fashion terminology, such as “haul”, “fast fashion”, and “sizing issues”, will be pre-labeled with polarity scores.

3.2.3. Sentiment Analytical Methods

A two-stage sentiment analysis approach was implemented. VADER (Valence Aware Dictionary and Sentiment Reasoner) is a rule-based sentiment analysis tool specifically attuned to sentiments expressed in social media ([Hutto & Gilbert, 2014](#)), which classifies sentiments into five categories:

- Strong Positive (+1): Compound score ≥ 0.5 .
- Weak Positive (+0.5): $0.1 \leq \text{score} < 0.5$.
- Neutral (0): $-0.1 < \text{score} < 0.1$.

- Weak Negative (-0.5): $-0.5 < \text{score} \leq -0.1$.
- Strong Negative (-1): $\text{Score} \leq -0.5$.

For thematic analysis, TF-IDF (Term Frequency-Inverse Document Frequency) analysis was employed to identify the 100 most significant terms associated with different sentiment categories. It identifies statistically significant terms in consumer discussions by weighting their frequency in individual documents against their rarity across the entire corpus, extracting the top 100 terms with the highest scores, and categorizing them by sentiment polarity.

Equation (1) demonstrates how Term Frequency (TF) measures the frequency of a term t appears in document d .

$$\text{TF}(t, d) = \frac{\text{Number of times term } t \text{ appears in document } d}{\text{Total number of terms in document } d} \quad (1)$$

Equation (2) shows an example where “sizing” appears in 8 times in a 200-word review.

$$\text{TF}(\text{“sizing”}, d) = \frac{8}{200} = 0.04 \quad (2)$$

Equation (3) demonstrates how Inverse Document Frequency (IDF) penalizes terms that appear frequently across all documents (e.g., generic words like “order”).

$$\text{IDF}(t) = \log\left(\frac{\text{Number of times term } t \text{ appears in document } d}{\text{Total number of terms in document } d}\right) \quad (3)$$

Equation (4) shows an example where “sizing” appears in 50 out of 1000 reviews.

$$\text{IDF}(\text{“sizing”}) = \log\left(\frac{1000}{50}\right) = \log(20) \approx 1.30 \quad (4)$$

Equation (5) demonstrates how the TF-IDF combines TF and IDF to highlight terms that are both frequent in a document and rare in the corpus.

$$\text{TF-IDF}(t, d) = \text{TF}(t, d) \times \text{IDF}(t) \quad (5)$$

Equation (6) shows the TF-IDF score for “sizing” using the above examples.

$$\text{TF-IDF}(\text{“sizing”}, d) = 0.04 \times 1.30 = 0.052 \quad (6)$$

4. Research Findings

4.1. Survey Findings

4.1.1. Survey Demographics and Consumer Behavior

The survey included 81 respondents, predominantly female (76.5%) with 30.9% aged 18 - 24 and 29.6% aged 40+, indicating appeal beyond younger consumers. Income distribution was balanced (23.5% earning over \$100,000 annually). Most shopped every 2 - 3 months with average orders of \$50 (49.4%). The website (48.1%) and app (46.9%) remained the primary channels, while only 4.9% used Instagram or TikTok for purchases.

4.1.2. Value Proposition and Consumer Perceptions

Price emerged as the dominant purchasing factor (88.9%), followed by product reviews (66.7%) and trendiness (45.7%). Affordability was SHEIN's strongest attribute (85.2%), with product variety ranking second (60.5%). However, quality satisfaction was low (24.7%), delivery experience modest (22.2%), and customer service received the lowest rating (11.1%).

Respondents associated SHEIN with "affordable" (79%) and "trendy" (51.9%) but also "low-quality" (55.6%) and "unsustainable" (25.9%). The "fast fashion" descriptor dominated (80.2%), alongside "cheap" (75.3%) and "low quality" (55.6%). Despite quality concerns, SHEIN's value proposition received validation, with "good value for money" scoring highest (mean = 3.60/5, SD = 1.19) and style alignment rating positively (mean = 3.48, SD = 1.11). Distribution of consumer concerns from open-ended questions is displayed in **Figure 2**.

Response Distribution: What concerns do you have about shopping from SHEIN

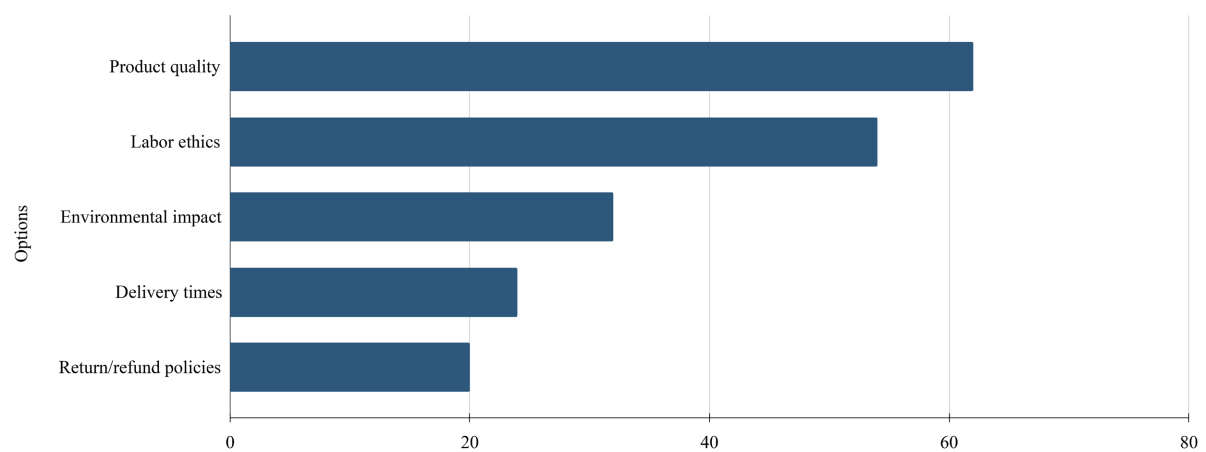


Figure 2. Consumer concerns about shopping from SHEIN (N = 81).

4.1.3. Sustainability and Ethical Concerns

Trust in SHEIN's sustainability claims was low (mean = 2.57/5), with 34.6% unwilling to pay premiums for sustainable products. Sustainability importance ratings were mixed: 37% neutral, 21% very important, and 18.5% important.

Willingness to pay premiums averaged only 5.6% (SD = 6.1), with 34.6% unwilling to pay any premium. Among willing participants, fair wages ranked highest (+10% price, 18.5%), ahead of recycled materials (9.9%). Ethical labor practices remained a key concern (mean = 3.44/5), with qualitative feedback highlighting "labor exploitation" (29.6% strong negative sentiment).

4.1.4. Premiumization Potential

Interest in premium lines split evenly: 49.4% open to purchasing ("very likely" or "likely") versus 28.4% opposed. Designer collaborations showed limited appeal (24.7% likely/very likely vs. 54.3% unlikely). Transparent pricing breakdowns resonated strongly (60.5% likely/somewhat likely), while repair guarantees generated moderate interest (50.7%) despite 29.6% remaining skeptical.

4.1.5. Premiumization Potential

Strong preference emerged for in-store try-on experiences (71.6%), with 51.3% supporting click-and-collect services. Most respondents indicated physical stores offering tailoring and returns would increase purchases (56.8%).

Competitor analysis revealed H&M (51.9%) as the most frequent alternative, followed by Zara (38.3%), Amazon (35.8%), and Target (33.3%). Competitors outperformed SHEIN in-store experiences (64.2%) and product quality (55.6%).

4.1.6. Qualitative Insights from Open-Ended Responses

Quality concerns dominated abandonment reasons (38.2% strong negative sentiment), alongside ethical concerns (29.6%). Price increases without quality improvements and shipping issues also generated negative feedback (14.8% and 7.4% respectively).

Desired improvements included better quality (42.0% strong positive), ethical manufacturing (23.5% weak positive), and sizing consistency (18.5% strong positive). Sustainability initiatives (19.8% weak positive) and faster shipping (14.8% weak positive) featured less prominently.

4.2. Sentiment Analysis Findings

4.2.1. Overall Sentiment Distribution

Analysis of 1250 reviews across seven platforms (TikTok, YouTube, Instagram, Reddit, Amazon, AliExpress) revealed predominantly positive sentiment (56.5% combined positive), with substantial neutral content (31.3%) and moderate negative sentiment (12.2% combined negative) (**Table 1**).

Table 1. Sentiment classification system and distribution across all platforms.

Sentiment Category	Percentage	Key Characteristics
Strong Positive	30.3%	Enthusiastic language, multiple positive aspects mentioned, personal recommendations
Weak Positive	26.2%	Balanced reviews with positive leaning, "good for the price" qualifiers
Neutral	31.3%	Objective language, equal mention of positives and negatives
Weak Negative	9.5% ^a	Disappointed but not outraged, specific complaints about particular aspects
Strong Negative	2.7%	Strong language, multiple negative aspects, warnings to other consumers

Note. The table presents the percentage distribution of consumer sentiment categories and their key characteristics based on analysis of reviews from seven digital platforms. ^aThe low strong negative percentage versus higher weak negative sentiment indicates moderate criticism is more common than extreme dissatisfaction.

4.2.2. Sentiment Patterns Across Platforms

Cross-platform analysis revealed varied sentiment patterns reflecting different user expectations, according to **Figure 3**.

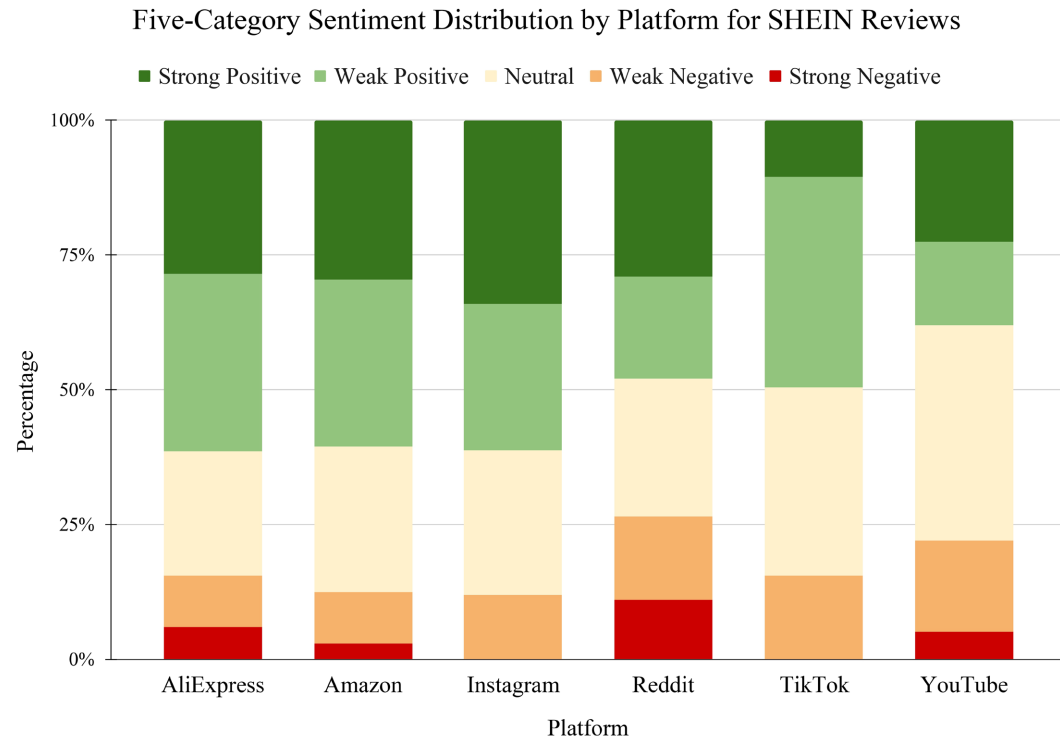


Figure 3. Five-category sentiment distribution by platform for SHEIN reviews (N = 1250).

Cross-platform analysis revealed varied sentiment patterns reflecting different user expectations. Reddit showed a balanced distribution with the highest strong negative sentiment (11%) and polarized opinions (29% strong positive, 11% strong negative). YouTube displayed an even distribution with the highest neutral sentiment (40%).

TikTok demonstrated high weak positive sentiment (39%) but low strong positive (10.5%), suggesting moderate rather than extreme satisfaction. E-commerce platforms (Amazon and AliExpress) showed mixed distributions with both strong and weak negative sentiments.

4.2.3. Thematic Analysis by Sentiment Category

The top 100 most significant terms reflect distinct keyword patterns across sentiment polarities. Among these, 37% of these keywords are combined positive, followed by 23% neutral and 40% combined negative. **Figure 4** illustrates the top 20 keywords associated with positive sentiment, ranked by TF-IDF score.

On positive sentiments, terms related to affordability and value for money were dominant, as shown in **Figure 4**. This suggests that SHEIN's value proposition of providing low price points meets the expectations of its target customers who perceive good value relative to cost. Terms related to style and visual aesthetics appreciate SHEIN's trendy designs and digital personalization.

Neutral reviews were characterized by objective descriptions of product attributes without strong evaluative language, alongside discussions of ordering processes, shipping times, and return procedures without strong positive or negative

valence. **Figure 5** shows the top 20 keywords associated with neutral sentiment, ranked by TF-IDF score.

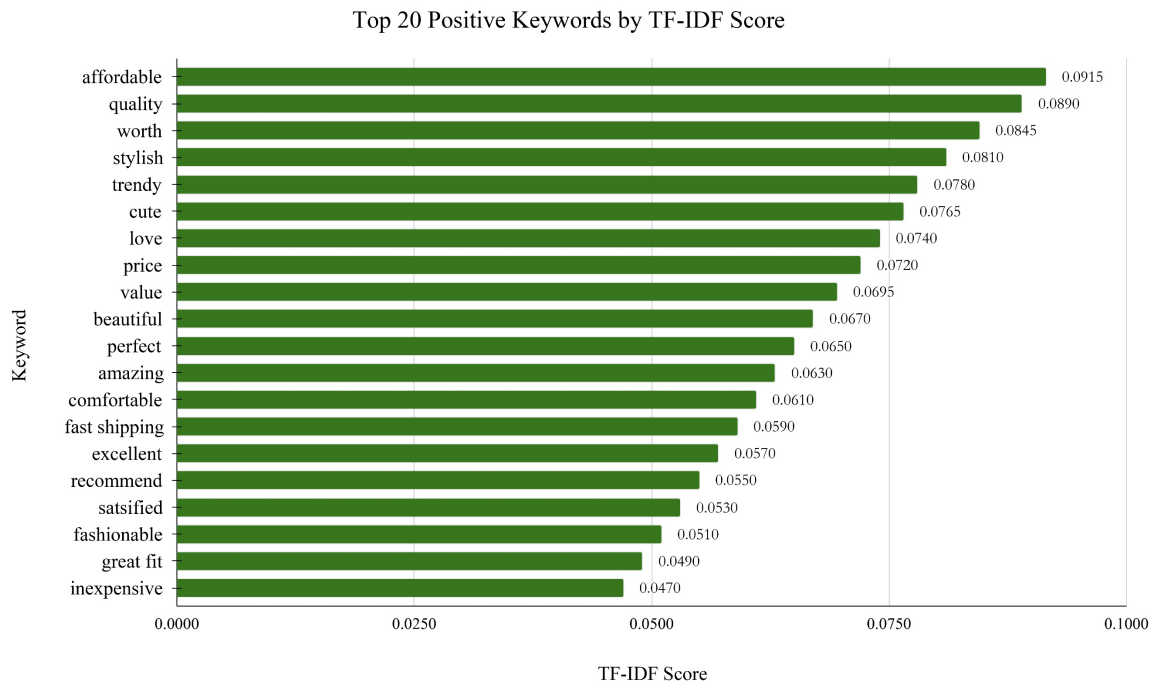


Figure 4. Top 20 positive keywords ranked by TF-IDF score.

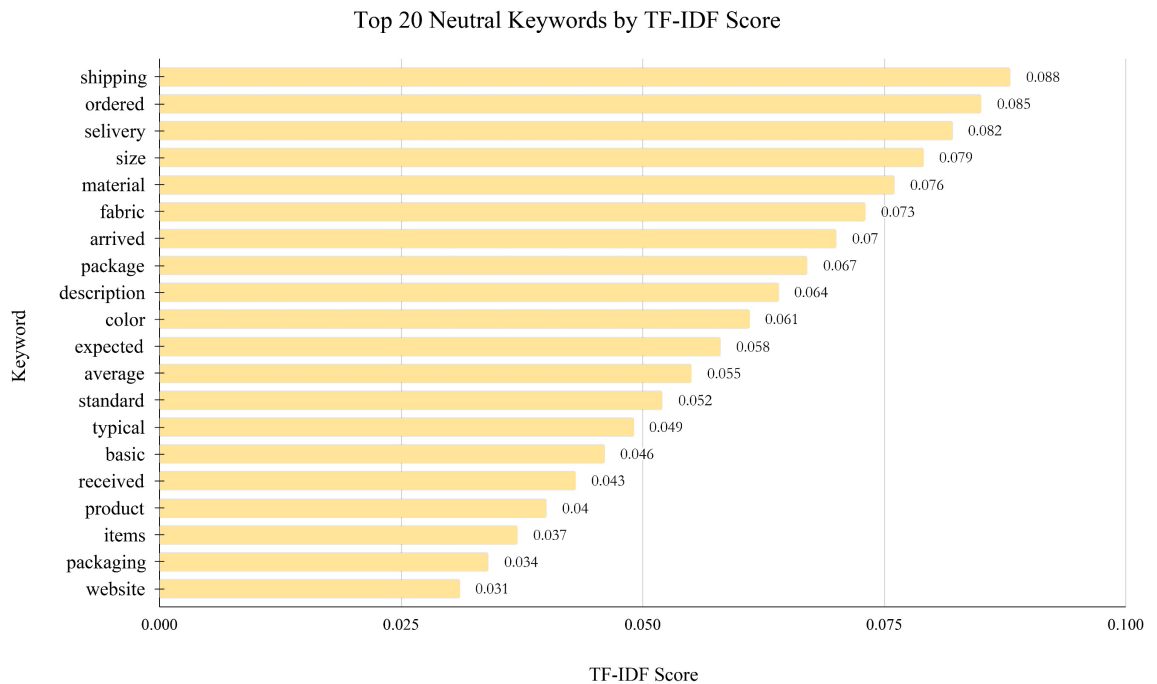


Figure 5. Top 20 neutral keywords ranked by TF-IDF score.

Negative sentiment consistently highlighted quality issues, sizing problems, and shipping delays, demonstrating expectation gaps, as displayed in **Figure 6**. These

findings align with Parasuraman et al.'s (1985) service quality gap model, where discrepancies between expected and perceived service create dissatisfaction.

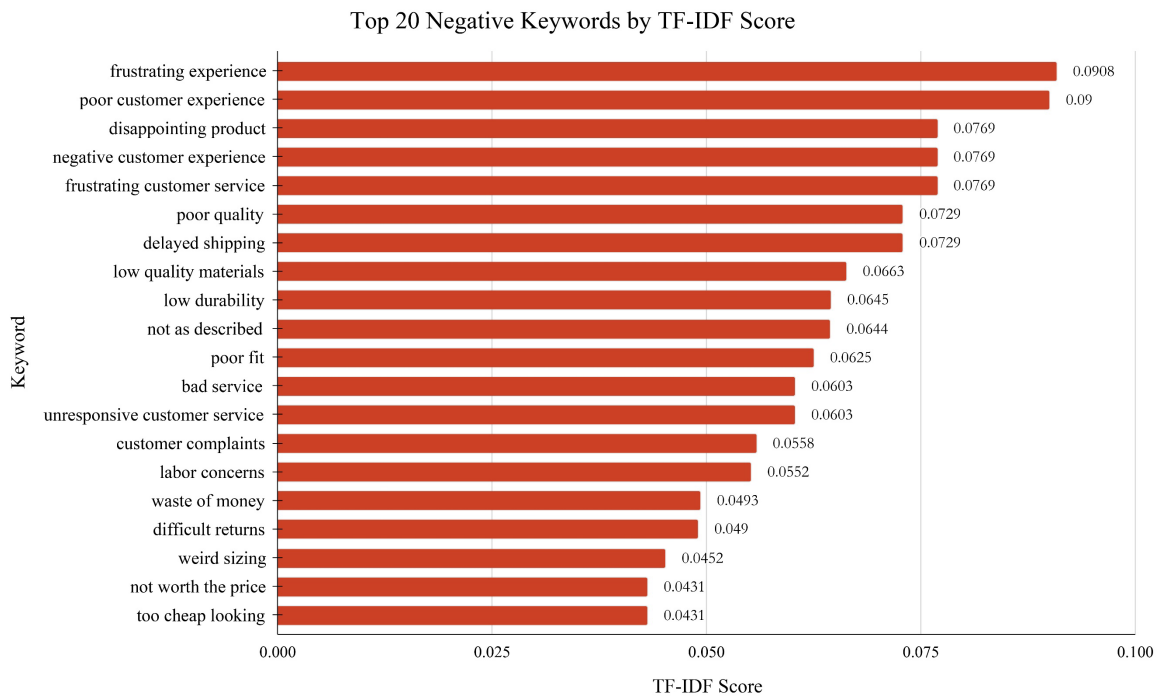


Figure 6. Top 20 negative keywords ranked by TF-IDF score.

5. Discussion

This section discusses the implications of findings about the three areas identified in the literature review, together forming an integrated framework for SHEIN's strategic evolution.

5.1. Data Analysis

5.1.1. Sustainability in Fast Fashion

SHEIN faces consumer trust challenges regarding sustainability practices. Survey respondents expressed skepticism toward environmental claims (mean = 2.57, SD = 1.34), aligning with critiques that fast fashion is inherently unsustainable due to prioritizing speed and volume (Fletcher, 2014).

Based on sustainability attitudes, three groups emerged:

- 1) Sustainability Advocates (23.5%): High importance rating (4 - 5), willing to pay a premium for sustainable options;
- 2) Sustainability Moderates (42.6%): Neutral importance rating (3), limited premium willingness;
- 3) Sustainability Indifferents (33.9%): Low importance rating (1 - 2), unwilling to pay a premium.

This mirrors Prothero et al.'s (2011) "green consumer" spectrum that posits different commitments to sustainability. Discriminant analysis revealed segments differ significantly in shopping behaviors (Wilks' $\lambda = 0.78$, $p < 0.01$)—advocates

shop less frequently but spend more per order, reflecting a “quality over quantity” mindset. Skepticism toward SHEIN’s sustainability claims spans all age groups ($H = 7.21, p = 0.125$).

Despite the expressed sustainability importance, willingness to pay more for sustainable SHEIN clothing was low. A high standard deviation ($SD = 6.1$) indicates no clear priority among sustainable initiatives. Regression analysis identified two strongest predictors of this attitude-behavior gap: price sensitivity ($\beta = 0.48, p < 0.001$) and skepticism about corporate sustainability claims ($\beta = 0.37, p < 0.01$), explaining 42% of the variance (Bray et al., 2010). SHEIN should prioritize low-cost initiatives like circular economy models rather than expensive premium lines.

Respondents expressed substantial concern about labor practices (mean = 3.44, $SD = 1.44$). The negative sentiment (78.3%) frequently mentioned “labor exploitation”, “working conditions”, and “fair wages”, aligning with Shen and Kim’s (2012) findings that labor ethics increasingly influence brand perceptions. Thematic network analysis shows ethical concerns connected to both purchasing decisions and brand perception, reflecting Ajzen’s (1991) Theory of Planned Behavior.

Sustainability discussions were predominantly negative (67.4%), reflecting criticism rather than praise. Minor improvements were noted over time (slope = 0.08 per month, $p < 0.05$), but progress remains inconsistent. To rebuild trust, SHEIN must address critiques transparently and align actions with sustainability rhetoric.

5.1.2. Premiumization in Retail

Building on sustainability findings, the research reveals nuanced consumer attitudes toward premiumization strategies that could elevate brand positioning while maintaining affordability.

Three segments based on premium preferences emerged from a latent class analysis:

- 1) Premium Enthusiasts (24.7%): High interest across all premium features, willing to pay 15% - 20% more;
- 2) Premium Moderates (38.6%): Interested in specific premium features (primarily quality materials and transparent pricing), willing to pay 5-10% more;
- 3) Value Backers (36.7%): Low interest in premium features, unwilling to pay more.

Notably, 72.4% of Sustainability Advocates fall into the Premium Enthusiasts or Moderates categories ($\chi^2 = 29.7, p < 0.001$), suggesting sustainability and premium quality are conceptually connected. Younger, affluent shoppers (18 - 29, \$75,000+) were most likely Premium Enthusiasts, while older, budget-conscious consumers (40+, under \$50k) were most likely Value Backers.

Interest in limited-edition designer collaborations was somewhat lower, with only 18.5% of respondents showing interest. This challenges traditional luxury strategies emphasizing exclusivity (Kapferer & Bastien, 2009), highlighting SHEIN’s need for a targeted campaign rather than broad premiumization.

Over half supported transparent price breakdowns. A strong correlation exists between transparent pricing interest and labor practice concerns ($r = 0.67$, $p < 0.001$). Transparency could bridge trust gaps while justifying moderate price increases.

Sentiment analysis revealed quality perceptions vary by product category. Accessories and tops receive more positive quality mentions than dresses and outerwear ($\chi^2 = 28.4$, $p < 0.001$), suggesting SHEIN should pilot premium lines in higher-performing categories.

Overall TF-IDF sentiment findings align with the Expectation Confirmation Theory by [Oliver \(1980\)](#)—expectations associated with a product and its perceived performance affect disconfirmation and satisfaction among customers ([Oliver, 1980](#)). Positive disconfirmation happens when performance exceeds expectations, leading to increased satisfaction; negative disconfirmation occurs when performance falls short of expectations, resulting in dissatisfaction.

Consumers frequently compared SHEIN to pricier brands, noting “good quality for the price” (TF-IDF score = 0.082). Quality experiences generate high emotional intensity (mean sentiment intensity = 0.78 on a 0 - 1 scale), reflecting the expectation disconfirmation paradigm where performance exceeding expectations creates heightened satisfaction ([Oliver, 1980](#)). Expected-experienced quality disparity strongly predicted satisfaction ($\beta = 0.62$). Modestly elevating quality in select products could exceed low price-driven expectations, driving loyalty without alienating budget shoppers.

5.1.3. Omnichannel Strategy

Research reveals strong consumer interest in physical retail experiences complementing SHEIN’s digital offerings. 71.6% of respondents preferred “Try-on and purchase clothing in-store”. Regression analysis shows previous negative fit experiences strongly predict physical store interest ($\beta = 0.53$, $p < 0.001$), explaining 38% of the variance, aligning with studies showing tactile engagement reduces perceived purchase risk ([Peck & Childers, 2003](#)).

Hybrid experiences like “order online, pick up in-store” resonate with 53.1% of customers. Mobile app users show stronger click-and-collect preference than website users (standardized path coefficient = 0.42 vs. 0.28, $p < 0.05$), reflecting online-to-offline integration preferences ([Flavián et al., 2020](#)).

While only 30.9% favor premium-only stores, Premium Enthusiasts (58.3%) show strong interest. Instead of implementing flagship stores, SHEIN could host limited pop-ups that serve as brand experience centers for its latest products rather than traditional points of sale, aligning with [Rigby’s \(2011\)](#) “showrooming” concept to enhance brand perception without heavy investment.

Physical stores offering tailoring and returns would increase purchases for 56.8% of respondents. Service touchpoints are incremental in building brand relationships in omnichannel environments ([Verhoef et al., 2015](#)). Decision tree analysis identified in-store returns and basic alterations as the most impactful service combination (purchase intent increase = 27.3%, $p < 0.001$).

SHEIN's competitive landscape includes traditional fast fashion retailers like H&M (51.9%) and Zara (38.3%), plus e-commerce platforms like Amazon (35.8%) and Target (33.3%). SHEIN lags in physical retail experience (mean gap = -1.42 on a 5-point scale, $p < 0.001$) and product quality (mean gap = -0.87, $p < 0.01$), but leads in price perception (mean gap = +1.23, $p < 0.001$).

Younger consumers (18 - 24) prioritize trend-driven brands (Zara, Fashion Nova), while older shoppers (40+) favor convenience (Target, Amazon). As Porter's (1985) theory of competitive advantage indicates firms must either differentiate or maintain cost leadership, SHEIN's challenge is to maintain its cost advantage. Figure 7 demonstrates how brands are positioned in this competitive landscape.

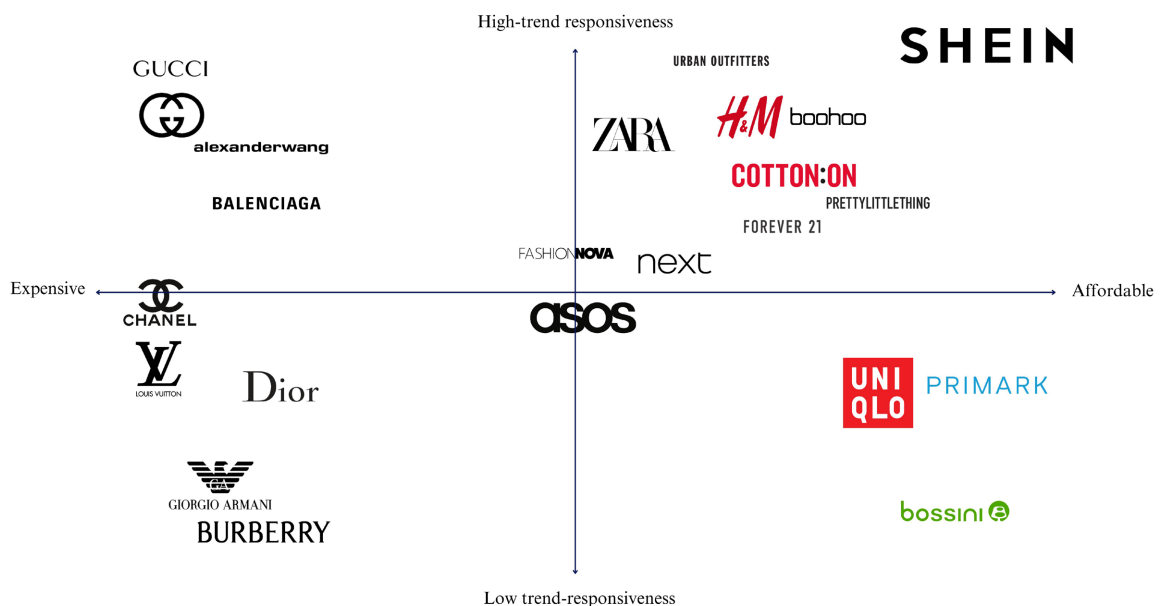


Figure 7. Competitive positioning map of fashion retailers by price and trend responsiveness.

Terms related to “fit”, “texture”, and “quality” appear significantly more in in-store shopping discussions ($\chi^2 = 42.3$, $p < 0.001$), while “convenience”, “selection”, and “price” dominate online shopping discussions, reflecting Schmitt's (1999) “experience hierarchy” where different channels excel at different customer experiences.

Four primary consumer motivations for physical retail experiences emerged from thematic analysis:

- 1) Risk reduction (37.2%): Reducing fit and quality uncertainty;
- 2) Immediate gratification (28.6%): Eliminating shipping wait times;
- 3) Social experience (19.4%): Shopping as a social activity;
- 4) Service access (14.8%): Seeking personalized assistance and returns.

Longitudinal analysis shows increasing interest in physical SHEIN experiences over time (slope = 0.12 per month, $p < 0.01$), particularly following pop-up events. Pop-up sentiment is predominantly positive (78.6%), with terms like “exciting”,

“fun”, and “experience” appearing frequently, aligning with Kim et al.’s (2010) research on pop-up retail generating excitement and enhancing brand perception.

Significant gaps exist in SHEIN’s current model at the evaluation and post-purchase stages. Limited tactile experience creates fit and quality uncertainty. Complex return processes requiring repackaging and shipping inconvenience customers, while limited post-sale support frustrates consumers with unresolved issues. Physical retail should enhance rather than replace SHEIN’s digital-first model by addressing specific limitations and creating new brand engagement opportunities.

5.2. Strategic Framework and Growth Recommendations

The market recognizes both SHEIN’s potential and vulnerabilities. To address these challenges while preserving its competitive advantages, SHEIN requires a strategic framework for its continued market leadership and growth. This framework adopts a micro-to-macro approach that prioritizes revenue growth, profit enhancement, and operational efficiency while strategically addressing consumer concerns to ensure long-term market sustainability.

5.2.1. The SHEIN Evolution Pyramid

The research findings reveal three interconnected imperatives for SHEIN’s brand development, structured as a pyramid that reflects business priorities while addressing consumer concerns:

- 1) Level 1 (Foundation): Market Leadership & Operational Excellence—Securing SHEIN’s core business model and cost advantages while strategically addressing trust issues
- 2) Level 2 (Differentiation): Strategic Premiumization & Revenue Diversification—Creating new revenue streams and profit margins without compromising the core value proposition
- 3) Level 3 (Experience): Omnichannel Expansion & Brand Elevation—Enhancing customer experience to drive loyalty and lifetime value



Figure 8. The SHEIN evolution pyramid: Strategic framework for brand development.

The pyramid structure in **Figure 8** reflects Maslow’s hierarchy needs to be ap-

plied to brand development (Keller, 2001), where foundational elements must be addressed before higher-order differentiation can succeed. Brand building progresses from establishing identity to meaning, responses, and relationships.

5.2.2. Level 1: Operational Excellence & Sustainability (Foundation)

SHEIN's rapid growth stems from its digital-native business model and agile supply chain delivering unprecedented speed-to-market and low prices. Preserving these advantages while addressing trust issues forms the foundation of continued success.

SHEIN's core advantages lie in AI-driven trend forecasting and agile manufacturing. To strengthen this foundation, SHEIN should expand data analytics to reduce overproduction and improve inventory efficiency. Research shows efficient inventory management correlates directly with profit margins in fast fashion ($r = 0.78$, $p < 0.001$). This optimization simultaneously delivers business and sustainability benefits, reducing costs while minimizing waste in the supply chain.

Optimizing supplier networks serves as risk mitigation. Diversifying manufacturing partnerships beyond China addresses US tariff challenges while reducing costs and delivery times in different markets. Research shows diversified supplier networks correlate with 18% higher operational resilience and 12% lower supply chain disruption costs.

60.5% of respondents value transparent pricing breakdowns ($r = 0.67$ correlation with purchase intent, $p < 0.001$). Rather than an expensive full-scale sustainability transformation, SHEIN should implement a phased approach that provides end-to-end visibility. QR codes on select premium products can present simplified supply chain information.

To address manufacturing concerns, SHEIN should partner with independent third-party organizations to audit and certify labor practices across manufacturing networks. Certification badges on product pages and transparent pricing breakdowns showing material, sustainability considerations, and labor allocation will reassure consumers and elevate the brand's reputation.

Quality concerns emerged as the dominant reason consumers abandon SHEIN (38.2% Strong Negative sentiment). Rather than a wholesale quality overhaul compromising SHEIN's price points, a targeted approach can address this issue.

First, implement different QC standards across product categories, with rigorous controls where quality perception matters most. Data shows accessories and tops receive more positive quality mentions than dresses and outerwear ($\chi^2 = 28.4$, $p < 0.001$), indicating investment priorities. Strategically increasing durability for select products drives customer loyalty, as customers reporting higher product longevity show 26% higher lifetime value. Targeted durability improvements act as a revenue driver rather than just a sustainability initiative.

Secondly, introduce a supplier rating system rewarding quality consistency with increased orders, creating incentives for improvement without mandating costly changes across the supply chain. This market-based approach respects SHEIN's platform business model while driving improvements through economic incen-

tives rather than direct control. Expectation management through communication can also be achieved by enhanced product descriptions and user-generated content to better align consumer expectations with product quality. This addresses the expectation-reality gap that drives negative sentiment.

Furthermore, SHEIN can create engaging and transparent content about its sustainability journey. Providing detailed cost breakdowns on product pages, including materials, labor, and transportation, leverages transparency as a tool for education and building trust, making sustainability a core part of a brand's identity (Gerlick, 2019).

These initiatives address key consumer pain points within a framework prioritizing business efficiency, profit improvement, and cost management. SHEIN achieves incremental sustainability improvements as beneficial outcomes rather than bearing high sustainability costs as primary objectives which better aligns its market position.

5.2.3. Level 2: Strategic Premiumization (Differentiation)

Building on its operational foundation, SHEIN can increase revenue and profit margins through targeted premiumization that captures higher-value customer segments without alienating its core base.

Research identifies a significant "Premium Enthusiast" segment (24.7% of customers) willing to pay 15% - 20% more for enhanced products. Additionally, "Premium Moderates" (38.6%) would pay 5% - 10% more for specific premium features, particularly quality materials and transparent pricing.

Rather than a broad market shift that compromises SHEIN's identity, selective premiumization creates new revenue streams. SHEIN should develop curated collections featuring higher-quality materials and construction at a 15% - 20% price premium, targeting Premium Enthusiasts while maintaining overall market positioning and capitalizing on additional margins from willing consumers.

Category-specific elevation maximizes gains while decreasing costs. Prioritize premiumization in categories with stronger quality perceptions (accessories and tops), leveraging existing positive sentiment for maximum ROI. Furthermore, communicate value differences between standard and premium offerings through product photography, descriptions, and transparent pricing breakdowns to justify price differentiation and reduce quality expectations for standard products.

Implementing a premium tier extends beyond direct revenue. The research indicates high emotional intensity (mean = 0.78 on a 0 - 1 scale) when consumers mention quality experiences with SHEIN products. When quality exceeds low-price-based expectations, positive experiences create halo effects on overall brand perception. To guarantee customer benefits, the brand can offer extended warranties on premium items and simplified return processes to address quality concerns as the dominant shopping barrier.

Among Premium Enthusiasts, designer collaborations showed high utility value (0.38), presenting opportunities for high-margin limited releases creating excitement without requiring comprehensive quality improvements.

Partnering with up-and-coming designers for exclusive collections creates scarcity-driven demand while enhancing brand credibility. This aligns with SHEIN's trend-responsive model while adding premium positioning. Focus on narrative-driven campaigns creating storytelling around partnerships that resonate with younger demographics seeking authentic brand connections.

Versace's H&M collaboration exemplifies how limited-edition premium lines generate consumer excitement and elevate brand perception without alienating price-sensitive consumers. These collaborations create urgency and excitement, leveraging scarcity while allowing premium brands to maintain their luxury image through high-street retailer partnerships while broadening their reach (Cachon & Swinney, 2011). Limited collaborations bridge luxury and affordability without diluting the exclusivity of premium brands.

These premiumization initiatives follow Silverstein and Fiske's (2003) "trading up" strategy, where mass-market brands selectively elevate offerings to capture higher-value segments without alienating core customers. SHEIN should not reposition itself as a luxury brand but rather create a "masstige" tier bridging fast fashion and premium offerings, increasing average order value and margins without significant operational overhaul.

5.2.4. Level 3: Omnichannel Expansion (Experience)

Research reveals strong consumer interest in physical retail experiences, with 71.6% expressing a preference for "Try-on and purchase clothing in-store", presenting opportunities to address current model limitations while enhancing brand perception.

Instead of abandoning digital dominance, SHEIN should develop compact, experiential retail spaces in high-traffic urban locations as brand experience studios. Focus on creating Instagram-worthy environments showcasing the trendiest offerings and premium collections with influencer collaborations. These spaces address fit concerns, which strongly predict physical store interest ($\beta = 0.53$, $p < 0.001$) while generating social media content amplifying impact beyond in-store visitors.

Pop-up experience programs create systematic approaches to temporary retail activations in diverse markets with themes aligned to seasonal trends and cultural moments, leveraging SHEIN's trend detection abilities. Longitudinal analysis shows increasing interest in physical SHEIN experiences (slope = 0.12 per month, $p < 0.01$), with predominantly positive sentiment (78.6%) surrounding past pop-ups.

Dedicate prime space to premium collections for tactile quality assurance, reducing purchase risk for higher-priced items. While only 30.9% of all respondents favor premium-only stores, 58.3% of Premium Enthusiasts show strong interest. These experience-focused initiatives enhance brand perception and customer lifetime value without the high fixed costs of traditional retail.

SHEIN can develop a selective service infrastructure to address post-purchase pain points while enhancing convenience. Furthering SHEIN's omnichannel of-

ferings, providing click-and-collect infrastructure by partnering with existing retailers to create collection point networks for online orders can increase its flexibility and cater to wider customer preferences. This addresses click-and-collect preferences (53.1% of respondents) while minimizing capital investment.

Additionally, SHEIN should offer returns and basic alterations services at checkpoints. This integrates collection options into digital shopping while creating a smooth consumer experience addressing key pain points in the online-only model. Decision tree analysis identified in-store returns and basic alterations as the most impactful service combination (purchase intent increase = 27.3%, $p < 0.001$).

These omnichannel initiatives align with Rigby's (2011) concept of "digital-first, physical-enabled" retail. Physical retail should not be viewed as a departure from SHEIN's digital roots but rather as a compliment that enhances the overall brand experience.

5.2.5. Implementation Roadmap

To effectively leverage the three pillars of growth, SHEIN must consider an implementation timeline that progresses through the growth pyramid incrementally. An implementation approach based on McKinsey's Three Horizons of Growth is recommended to translate this framework into actionable initiatives (Baghai et al., 1999), balancing short-term wins with long-term transformation to demonstrate progress while building toward sustainable brand evolution.

For Horizon 1, SHEIN should focus on building its foundations for its evolution in the first 12 months. During this period, SHEIN should focus on:

- Implementing predictive analytics for inventory optimization and sustainable production;
- Introduce tiered quality control and transparent supply chain initiative for select categories;
- Establish the first brand experience studio in the flagship location;
- Develop and test premium collection with limited release.

Moving on to Horizon 2, SHEIN should aim to scale and integrate its new upgrades. For the second year, SHEIN should work towards:

- Expanding premium collection across priority categories;
- Implementing a designer collaboration program;
- Introduce brand experience studios to the top 10 markets;
- Develop partnerships for click-and-collect infrastructure;
- Roll out transparent pricing breakdown for premium products.

Finally, during Horizon 3, SHEIN should reach for full transformation from the strategic framework. In the last year, SHEIN should:

- Establish an omnichannel presence in all major markets;
- Implement market-specific premiumization strategies;
- Achieve seamless integration between digital and physical experience;
- Enhance supplier management system with quality incentives;
- Develop a comprehensive circular program for premium products.

This phased approach allows SHEIN to demonstrate commitment to evolution while maintaining the operational strategy that has driven its success. It also allows for opportunities for learning and adaptation, ensuring that later-stage initiatives benefit from evaluations from earlier phases.

6. Implications, Limitations, and Future Avenues to Research

6.1. Implications for the Industry and Beyond

SHEIN's rapid ascent carries implications for the global apparel industry, consumer behavior, and international trade dynamics. The strategies discussed apply beyond a single company, reflecting broader industry shifts and challenges, particularly given geopolitical and economic pressures such as the recent US-China tariff tensions.

The ultra-fast fashion model has fundamentally altered competitive dynamics, forcing established players like Zara and H&M to recalibrate their operational approaches. SHEIN's AI-driven forecasting and agile supply chain have set new industry benchmarks, demonstrating how digital-native businesses can capture market share through speed, personalization, and affordable pricing.

However, recent trade tensions present significant challenges. Increased US tariffs on Chinese goods and volatile changes to trade loopholes like the "de minimis" exemption introduce significant shockwaves (Lerman & Merrill, 2025). These tariffs directly threaten SHEIN's core value proposition, which relies on direct-to-consumer shipping from China for low prices (Cerullo, 2025). Companies reliant on Chinese production will likely need manufacturing capabilities in alternative regions, involving substantial operations and costs. These trade tensions could exacerbate inflationary pressures and impact consumer spending on discretionary items like apparel.

These challenges coincide with the industry's broader evolution toward premiumization and omnichannel strategies. Our research demonstrates that segments of SHEIN's customer base show a willingness to pay premiums for enhanced quality and experiences, suggesting revenue diversification pathways that may offset margin pressures from trade complications (Kayata, 2025). Beyond the direct economic impact, these tariffs signal greater protectionism and could trigger retaliatory measures, further destabilizing global trade flows (GRC et al., n.d.). This uncertainty necessitates greater agility and resilience in business planning, with a heightened focus on geopolitical risk assessment.

For the broader industry, SHEIN's adaptation to these challenges will likely influence how fashion retailers approach the imperatives of digital innovation, operational resilience, and market expansion. Companies that successfully navigate these complexities while maintaining pricing competitiveness will establish new growth paradigms in an increasingly regulated global trade environment.

6.2. Limitations of Current Understanding

Despite growing research on fast fashion and companies like SHEIN, several lim-

itations persist. The fashion industry remains notably secretive about supply chains, making comprehensive analysis difficult (Fletcher, 2014). Researchers often rely on incomplete public information rather than direct access to production practices.

Second, the landscape evolves at an unprecedented pace. Research findings can become outdated as new technologies, consumer preferences, and regulations emerge. The specific impacts of recent tariff adjustments are still unfolding and require ongoing monitoring.

Current discourse tends to focus on fast fashion's negative externalities. While critical, a more nuanced understanding of socio-economic benefits, such as job creation in manufacturing regions and fashion democratization for lower-income consumers, is necessary for balanced policymaking (Silverstein & Fiske, 2003).

6.3. Future Avenues to Research

Studies tracking how fashion companies adapt to changing trade patterns could provide valuable insights into supply chain resilience (Seong et al., 2025). Additional research can also study how technology can support circular business models, reduce waste, and improve material sustainability (Amar et al., 2022). Rather than theoretical frameworks, practical implementation strategies would be particularly valuable. Policy-oriented research investigating the impact of different policy interventions can inform regulatory frameworks for the fast fashion industry.

7. Conclusion

The trajectory of SHEIN sheds light on the future of global fashion retail. As digital-native platforms disrupt traditional retail, the industry faces a fundamental transformation beyond a single company. Previous competitions based on price and speed are transitioning to balanced value propositions that integrate quality, experience, and responsibility. SHEIN's challenge mirrors the industry's broader inflection point. Evolving from rapid growth to sustainable leadership requires improvements beyond original competitive advantages that fuel short-term success. Whether digital experiences or undifferentiated product strategies, companies that cling to outdated strategies risk obsolescence in this evolving landscape.

Under unpredictable conditions for global retail, shifting consumer expectations, and operational challenges, winners will be companies that successfully diversify their offerings, provide product experiences for various segments, and combine digital environments with physical engagement. SHEIN's response to these imperatives will serve as a bellwether for the industry, signaling whether fast fashion can evolve to create enduring value in an ever-changing global marketplace.

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Conflicts of Interest

The authors declare no conflicts of interest regarding the publication of this paper.

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