

Published a report of "Consumer Survey on Fashion" with the announcement of the new service "niaulab by ZOZO." Approximately 80% want to use a personal styling service

~ 92% of respondents answered that it is important how nice they look in fashion ~

ZOZO, Inc. (headquartered in Chiba City, Chiba Prefecture, Representative Director, President & CEO: SAWADA Kotaro), which operates the fashion e-commerce ZOTOTOWN conducted a "Consumer Survey on Fashion" on ZOTOTOWN (survey period: September 6th - 8th, 2022, respondents: 70,293 ZOTOTOWN users). In this research, the survey conducted in preparation for the opening of the new service "niaulab by ZOZO" (hereinafter referred to as "niaulab") shows 79% of respondents in total. and 89% of the 29,156 respondents specifically in Generation Z (aged 18-25) answered that they would like to use personal styling.

As background, 92% of the total respondents answered that they think it is important that they look good and nice in their outfits as the point of greatest importance in fashion, and this shows that the state they look nice in their outfits or in other words, the fact fashion matches them is an important element. On the other hand, 82% of respondents have some sort of concerns about fashion when purchasing fashion items for themselves or thinking about how to wear those items. Among the numerous concerns, the concern came in first place is that they tend to go with accustomed fashion (32%), and they are not sure what fashion they look nice in" (28%) in second place. Among them, when looking at the results of Generation Z specifically, the concern in the first place is they are not sure what kind of fashion they look nice in (34%). As a whole, even among many people who have concerns about how fashion matches them, many of Generation Z in particular are very concerned about it, suggesting that this has led their attention to the use of personal styling.

ZOZO, with its management strategy is "More Fashion × Better Fashion Tech - Explore your style. Make you delighted. - " deepens understanding of people's attitudes and feelings toward fashion, and how fashion could match or look good on them through this survey, and leverages it to improve the new service "niaulab by ZOZO" and future services.

An Overview of "Awareness Survey on Fashion"

Respondents Individuals of Male and Female at age of 15 – 59 (all over Japan)

*Survey scores are weighted-sampled to match the composition of ZOZO members.

	Teens (over 15)	20s	30s	40s	50s	Total
Male	4,018	4,799	2,081	1,906	654	13,458
Female	8,527	23,212	13,110	9,010	2,976	56,835
Total	12,545	28,011	15,191	10,916	3,630	70,293

*Among the above, 18-25 year-olds are defined as "Generation Z". Total 29,156 (male: 6,315; female: 22,841)

Survey period November 6th – 8th, 2022

Conducted by ZOZO, Inc. / survey of ZOTOTOWN users.

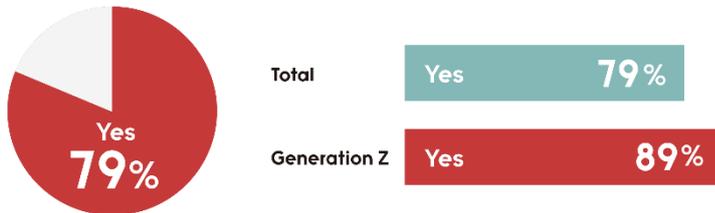
<Report of Consumer Survey on Fashion>

Q. Do you want to use Personal Styling Service(*) as an inspiration for your fashion?

- 79% of the total respondents answered that they want to use while 89% of the Generation Z out of the total respondents answered that they want to use

*Personal styling is a service of full package for fashion and hair makeup that takes "body shape," "color," and "taste" into account as well as customers' preferences and concerns. (Supposing the service is free of charge,)

Q. Do you want to use Personal Styling Service(*) as an inspiration for your own fashion?



Q. What do you consider important in "fashion" in general? (multiple answers allowed)

- 92% of the total answered how they would look in their outfits as the point of greatest importance in fashion, which is outstandingly higher than the second point or below.

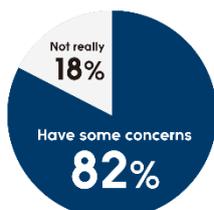
Q. What do you consider important in "fashion" in general?



Q. Do you have any concerns when purchasing fashion items for yourself or thinking of outfit ideas?

- 82% of the total answered that they had some sort of concerns

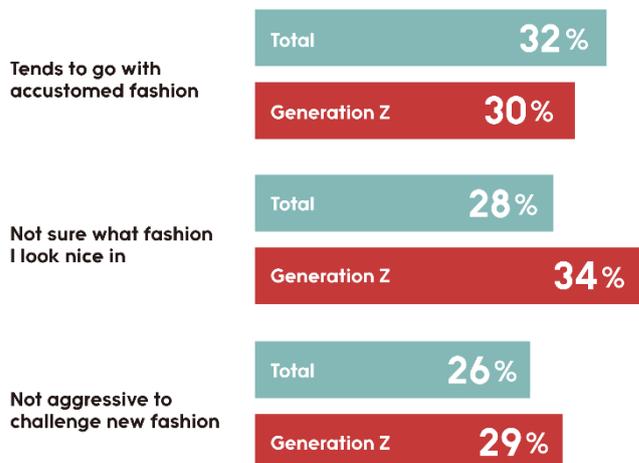
Q. Do you have any concerns when purchasing fashion items for yourself or thinking of outfit ideas?



Q. What concerns you most when purchasing fashion items for yourself or thinking about wearing them? (multiple answers allowed)

- "Tends to go with accustomed fashion" (32%) comes in first place out of all. And "Not sure what kind of fashion I would look nice in" (28%) is in second, while it comes in first place out of other answers specifically from Generation Z (34%).

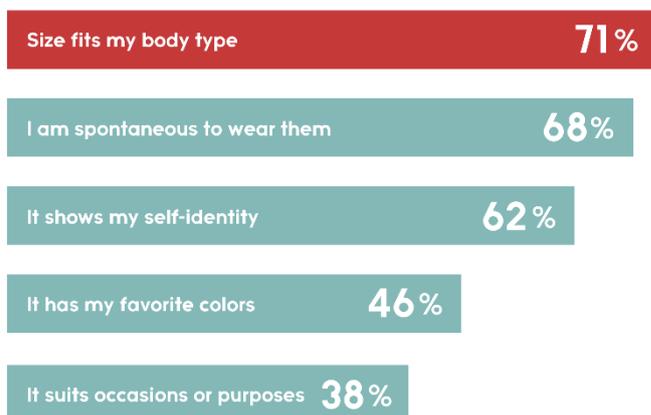
Q. What concerns you most when purchasing fashion items for yourself or thinking of outfit ideas?



Q. You think you look nice when.. (multiple answers allowed)

- "I am spontaneous to wear them" (68%) comes in second place out of the other answers, followed by "it shows my self-identity" (62%). In addition to "Size fits my body type" (71%) tops the answers, "Personality" is seen as an important factor.

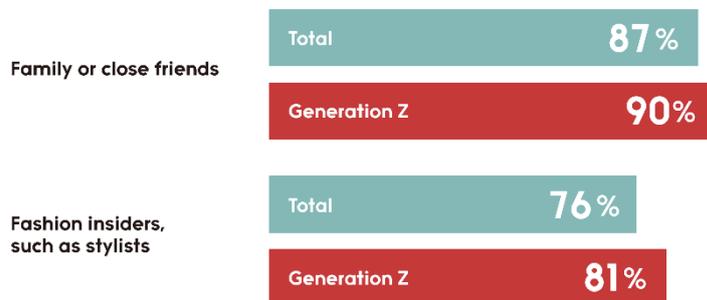
Q. You think you look nice when..



Q. You could be confident if you are told that you look nice in your fashion by.. (multiple answers allowed)

- Family and friends, or professionals such as "stylists" give them confidence.
- Especially in the Generation Z, think fashion insiders such as stylists would give them confidence, more than the whole respondents think.

Q. You could be confident if you are told that you look nice in your fashion by..



Q. When you think you look nice in your fashion, you feel.. (multiple answers allowed)

- "Happy" "Excited or delighted" and "Confident or proud" account for top answers and it shows fashion gives them a positive feeling when they look nice in their outfits.
- This is even more evident in Generation Z.

Q. When you think you look nice in your fashion, you feel..

