

# Bespoke Survey Research

July 2023

## Temu

Volume 3 | Quarterly Survey

1,000+ US Consumers Balanced To Census

Tickers Covered: PDD, AMZN, WISH, ETSY, W.

### KPIs and Key questions

1. Awareness of Temu has increased very sharply over the three quarterly surveys that we have conducted between January and now.
2. The share of consumers who have shopped Temu has increased each wave since January.
3. NPS varies drastically by shopping frequency. Regular shoppers of Temu give is an NPS of 76, which is an extremely strong score. One-time shoppers give is a negative score.
4. Temu shoppers indicate that they are primarily using the retailer for clothing and shoes. They also indicate a much higher likelihood of using it going forward for lower cost items compared to higher cost items.
5. Temu shoppers expect to use it more going forward.
6. What customers like about Temu the most is the low price of products. Top complains include wanting faster shipping, and quality issues.
7. The share of Temu customers who say their Temu shopping replaces shopping on other sites/apps/stores has increased sequentially. These folks primarily call out Amazon, Shein, Wal-Mart, and Wish as the platforms they are replacing.
8. Other platforms in which Temu customers have a high degree of cross-over with include Wish.com, Shein, Wayfair, Zara, H&M, Burlington, and the Gap.
9. Temu customers over-index as female, lower income, and younger relative to the broader population.

### Noteworthy Stats:

**29.1%** Of respondents said that they buy from Temu often to very often.

**48.0%** Of Temu users noted that they turn to Temu for clothing products.

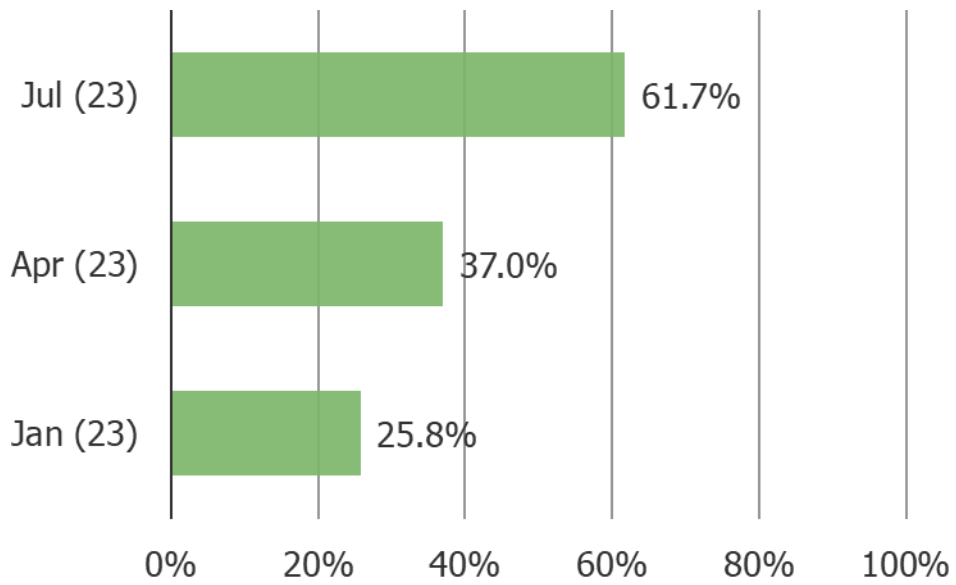
**39.5%** Of respondents who shop Temu regularly note that Temu purchases replace purchases they would have made elsewhere.

Temu

# TEMU ENGAGEMENT AND SENTIMENT

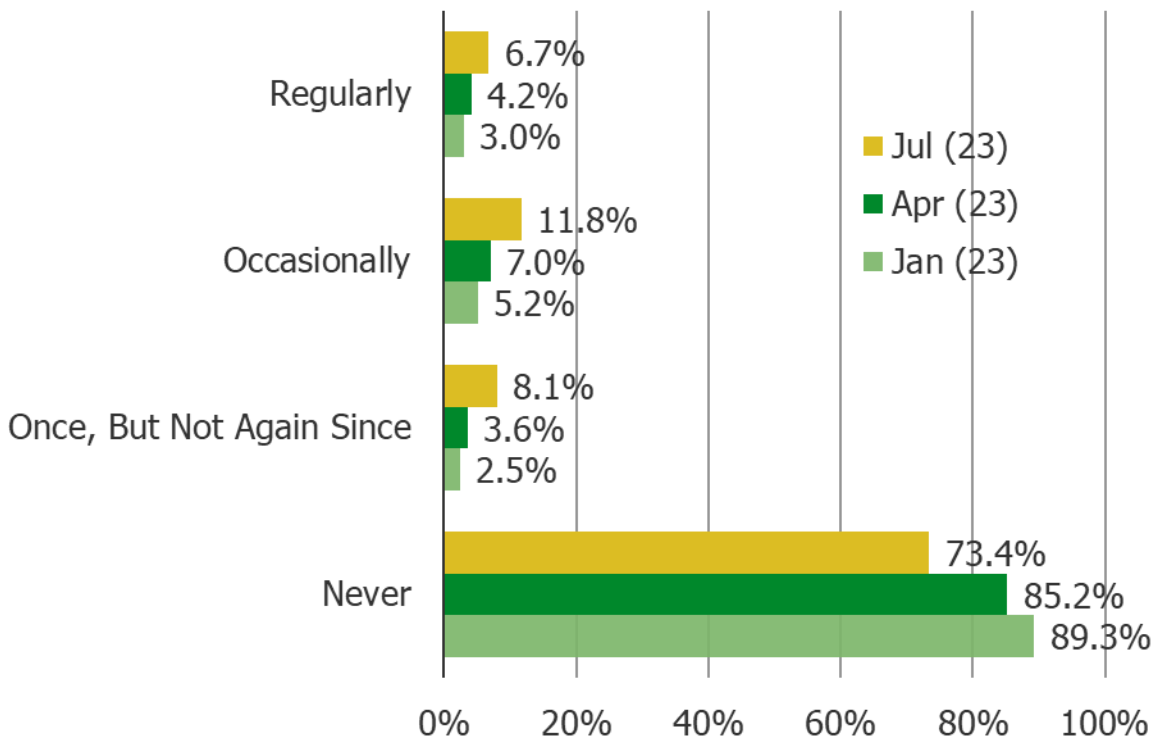
% AWARE OF TEMU

Posed to all respondents



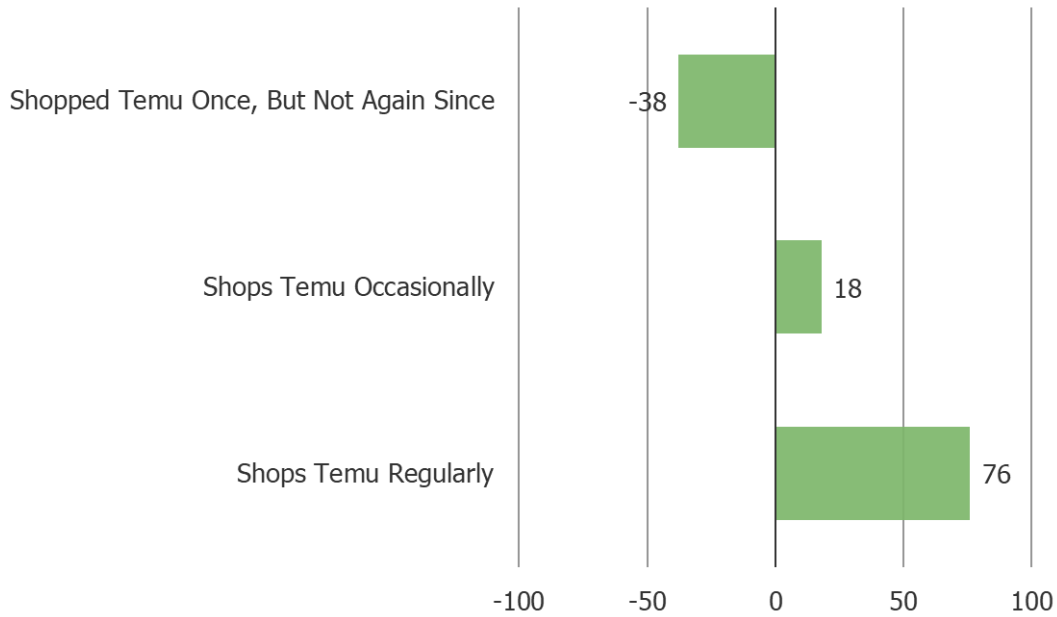
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH TEMU?

Posed to all respondents

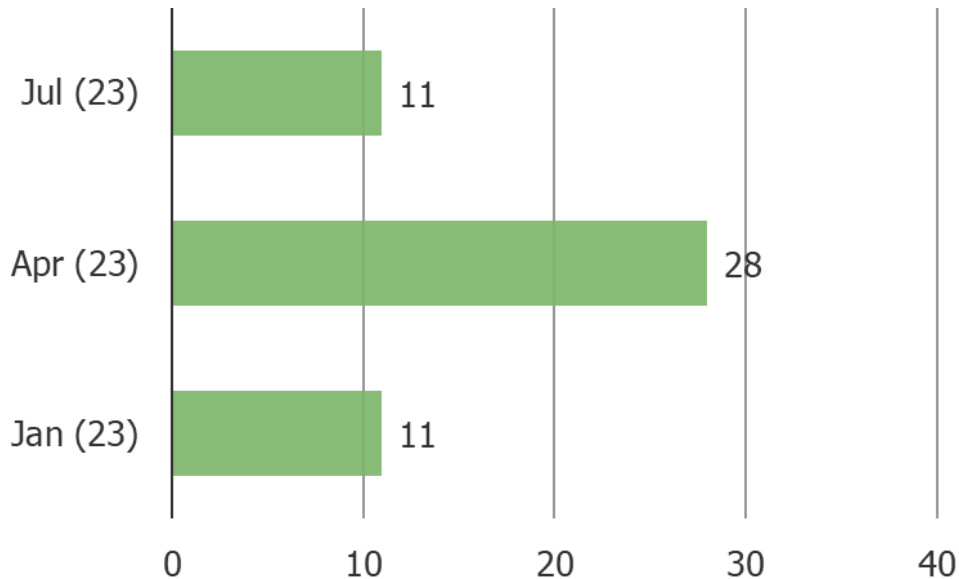


HOW LIKELY IS IT THAT YOU WOULD RECOMMEND TEMU TO A FRIEND OR COLLEAGUE?

Posed to all respondents who have shopped Temu (N = 760, combining multiple waves to achieve a larger N size on cross-tabs by frequency)



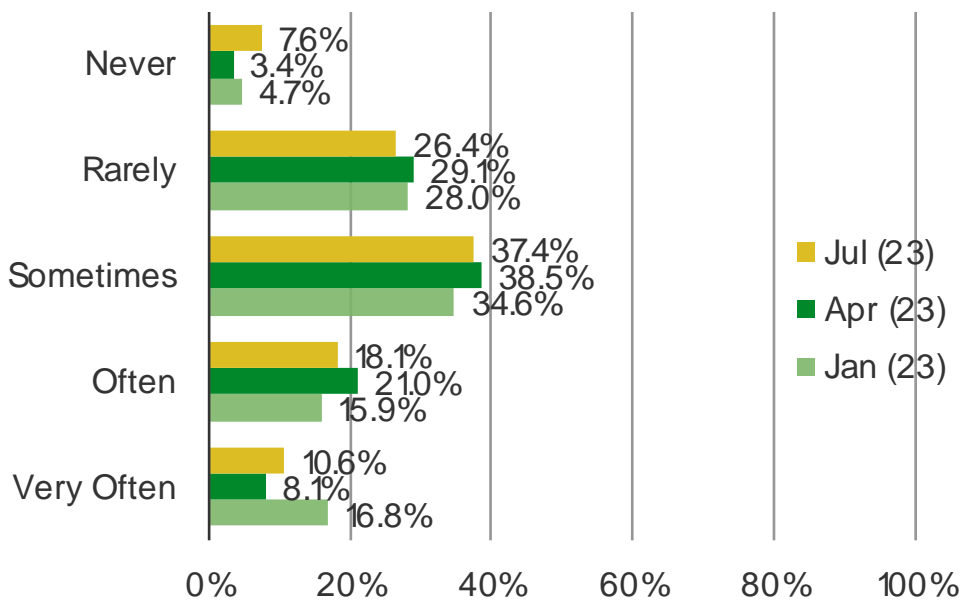
All who have shopped Temu, wave by wave.





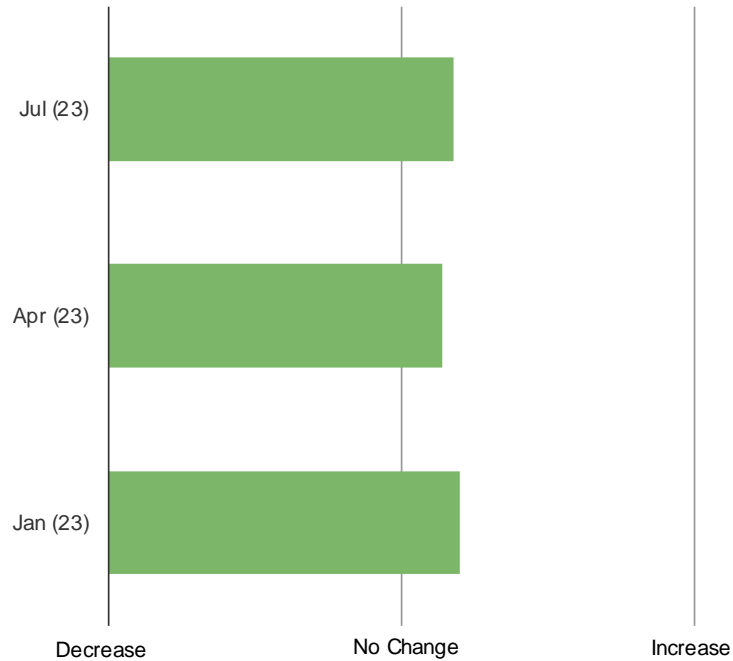
HOW OFTEN DO YOU BUY PRODUCTS ON TEMU?

Posed to all respondents who have shopped Temu (N = 265)



DO YOU EXPECT TO INCREASE OR DECREASE YOUR USAGE OF TEMU GOING FORWARD?

Posed to all respondents who have shopped Temu (N = 265)



Reasons cited for decreasing:

- Poor quality
- Made in China
- Slow shipping
- Cutting back spending in general

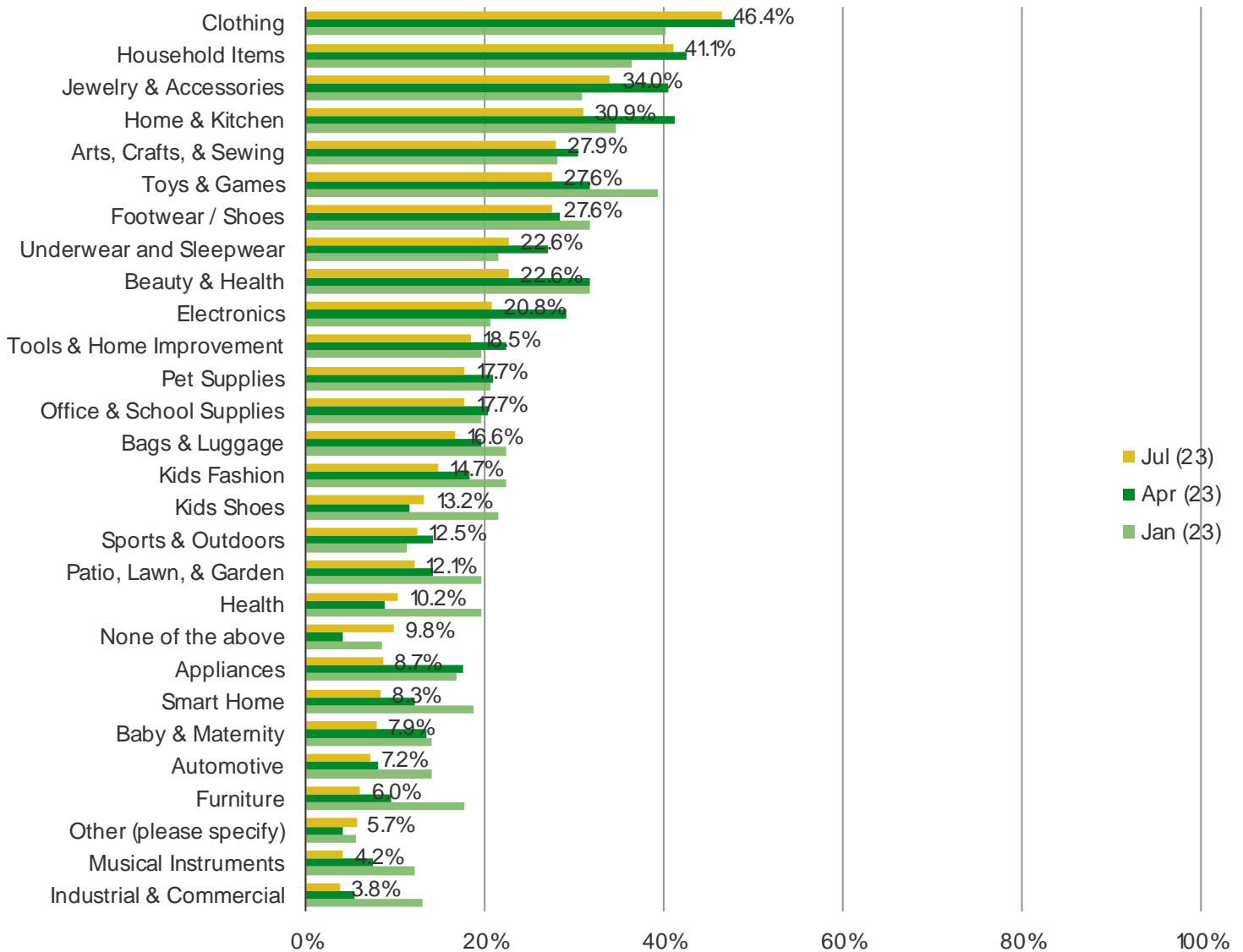
Reasons cited for increasing:

- Great prices / value
- It's fun and easy



WHICH TYPES OF PRODUCTS DO YOU FEEL TEMU IS BEST FOR? SELECT ALL THAT APPLY

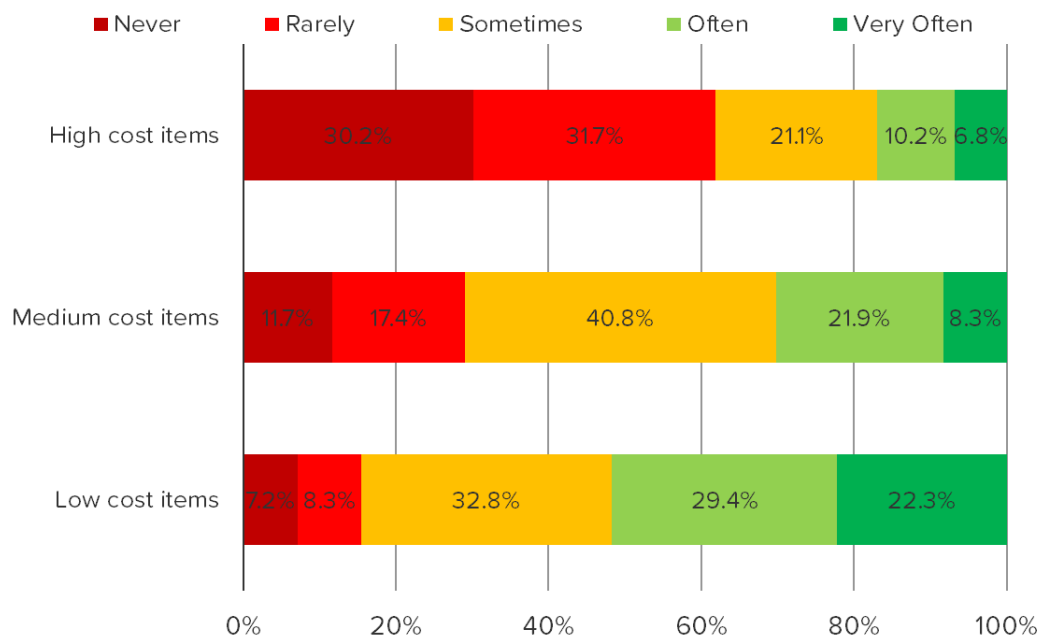
Posed to all respondents who have shopped Temu (N = 265)



HOW OFTEN WILL YOU USE TEMU FOR THE FOLLOWING TYPES OF PURCHASES GOING FORWARD?

Posed to all respondents who have shopped Temu (N = 265)

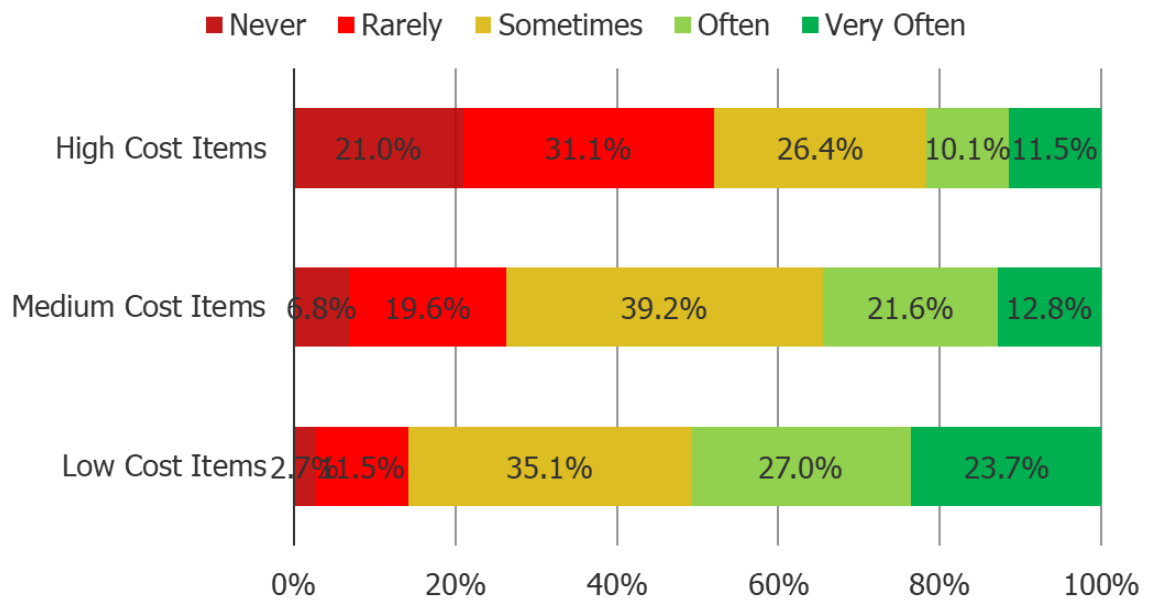
July 2023



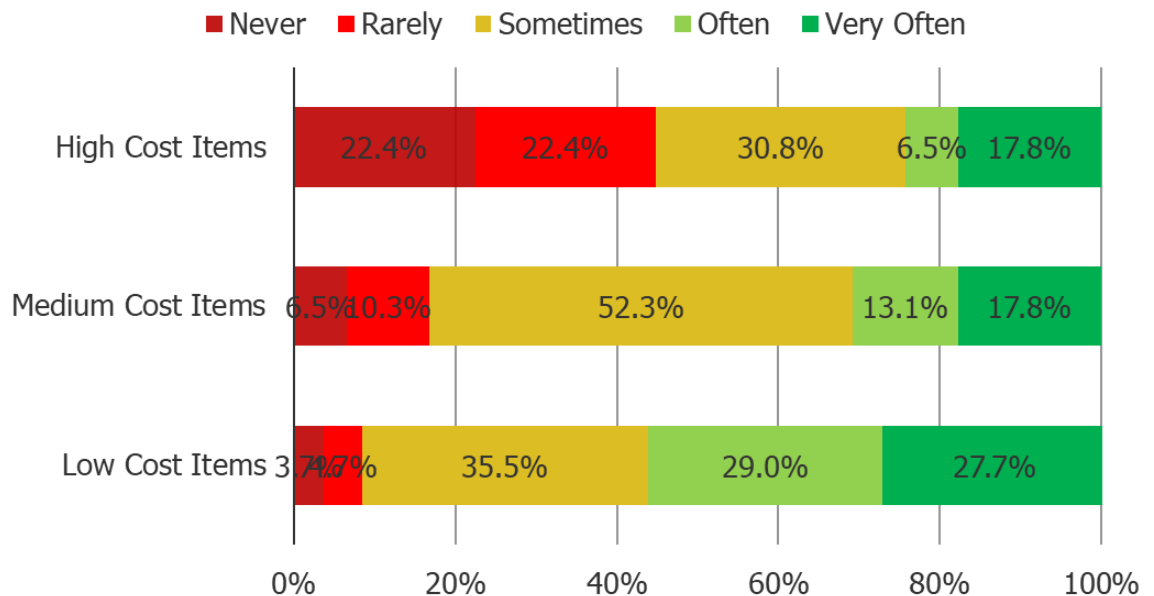
HOW OFTEN WILL YOU USE TEMU FOR THE FOLLOWING TYPES OF PURCHASES GOING FORWARD?

Posed to all respondents who have shopped Temu (N = 148)

April 2023



Jan 2023

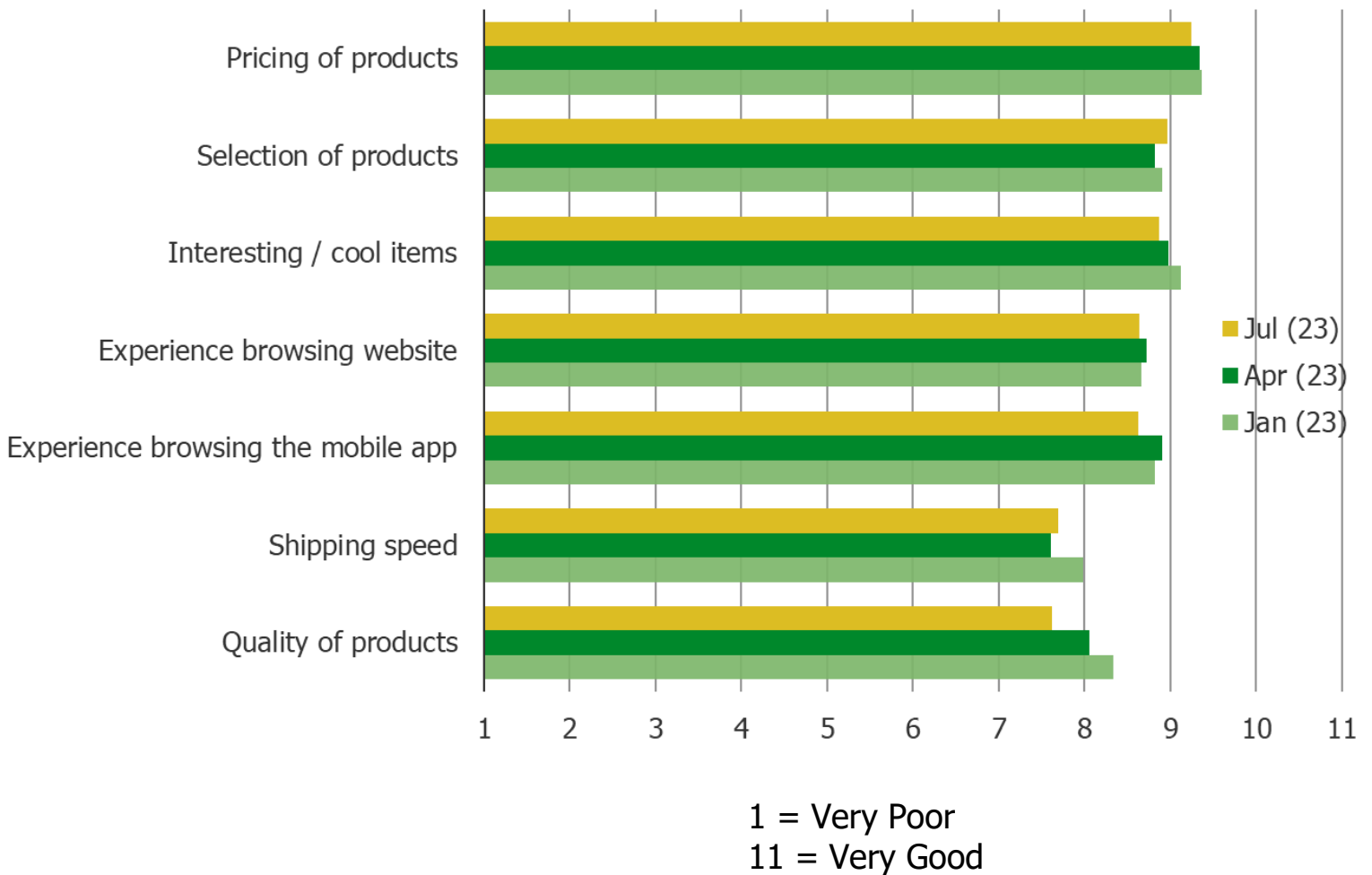






WHAT IS YOUR OPINION OF TEMU WHEN IT COMES TO...

Posed to all respondents who have shopped Temu at least one time.

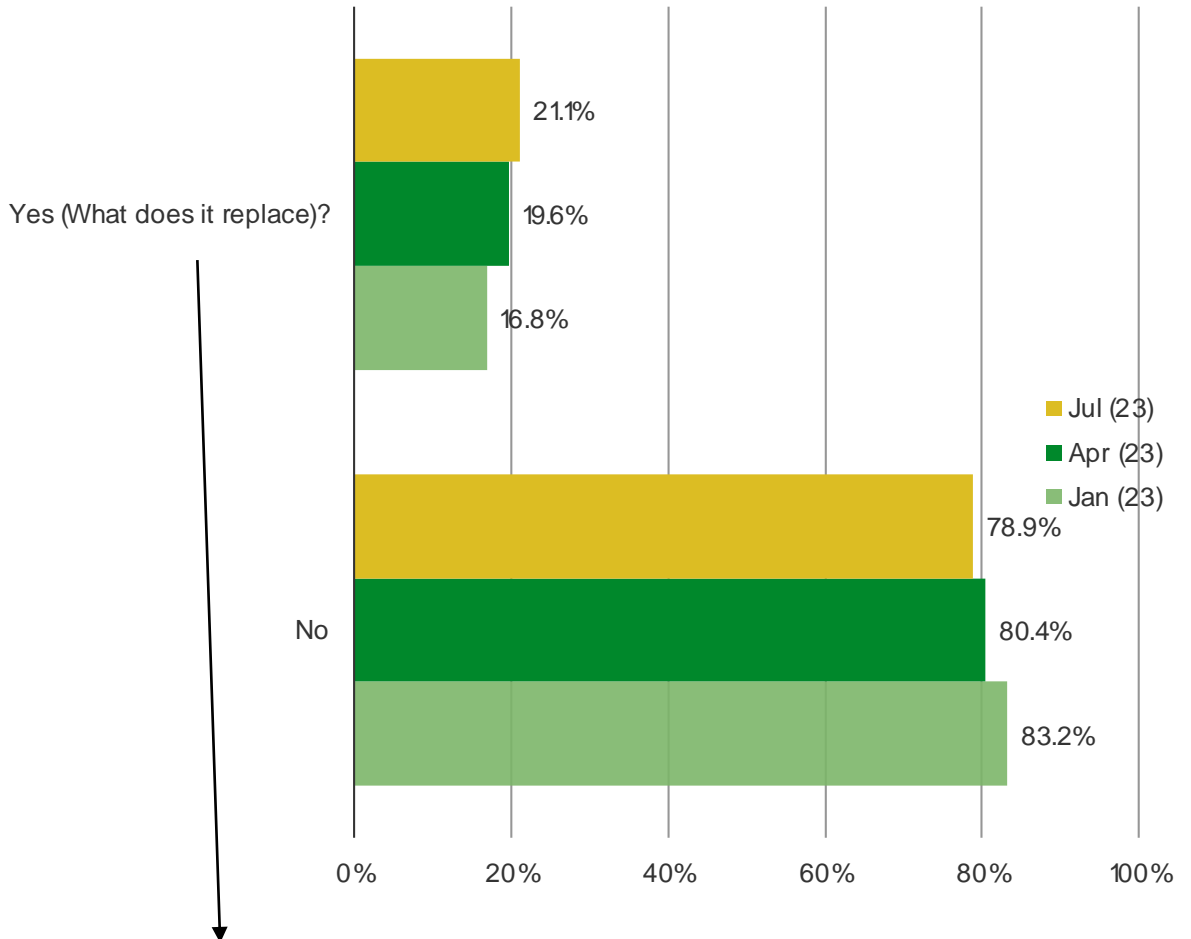


Temu

## WHO MIGHT TEMU AND SHEIN BE DISRUPTING?

DO YOU FEEL YOUR SHOPPING ON TEMU REPLACES ANY OF YOUR SPENDING THAT WOULD TYPICALLY GO TO OTHER WEBSITES, APPS, OR STORES?

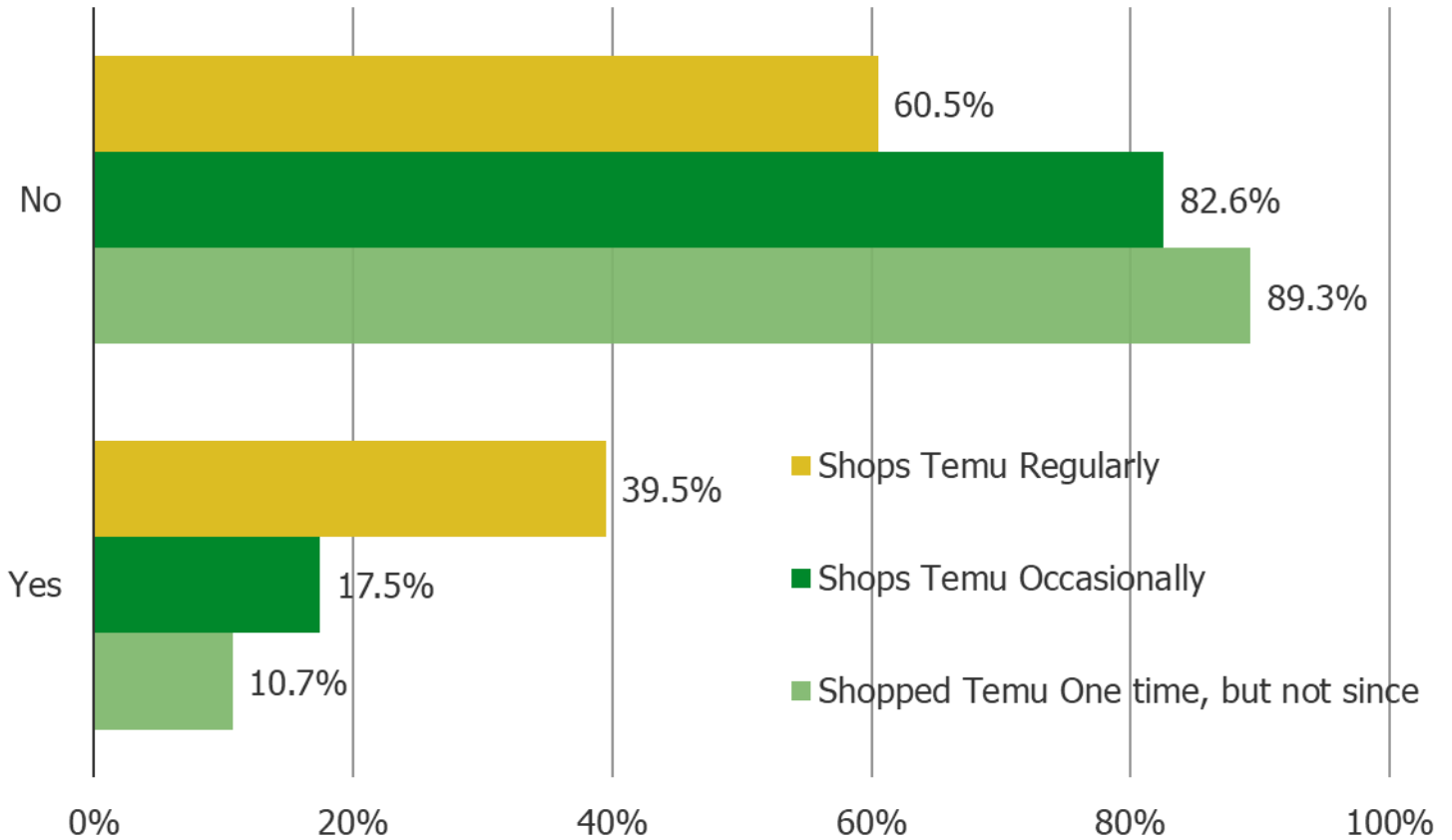
Posed to all respondents who have shopped Temu (N = 265)





DO YOU FEEL YOUR SHOPPING ON TEMU REPLACES ANY OF YOUR SPENDING THAT WOULD TYPICALLY GO TO OTHER WEBSITES, APPS, OR STORES?

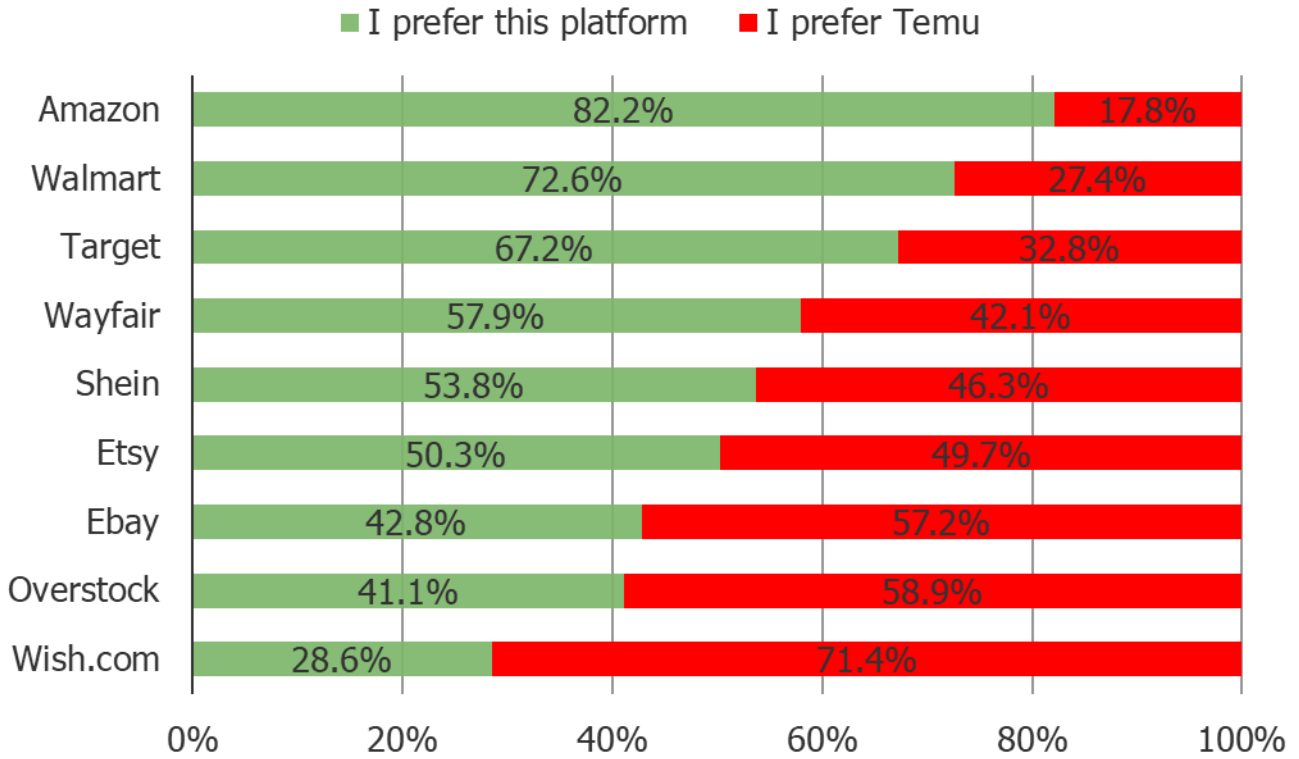
Cross-Tab Analysis – by how often respondents shop Temu.



Ie, 39.5% of those who shop Temu regularly said that it replaces spending that would typically go to other websites, apps, or stores.

HOW DO THE FOLLOWING COMPARE TO TEMU?

Posed to all respondents who have shopped Temu AND also shop the following.



Combining multiple waves to achieve larger N sizes...

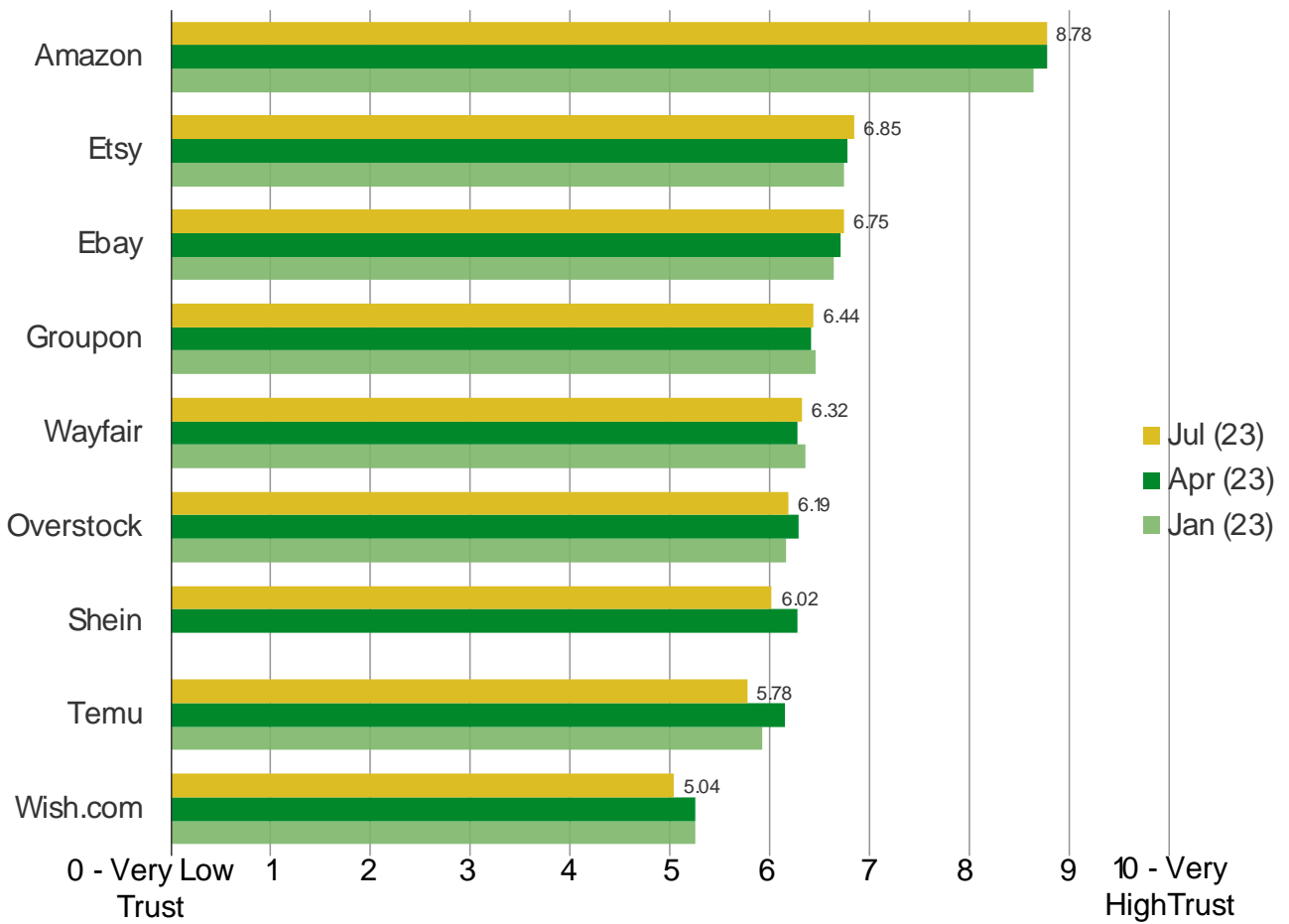
	N =
Wish.com	175
Overstock	124
Ebay	201
Etsy	155
Shein	80
Wayfair	126
Target	195
Walmart	237
Amazon	247

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## COMPETITIVE DYNAMICS

HOW MUCH TRUST DO YOU HAVE IN THE FOLLOWING?

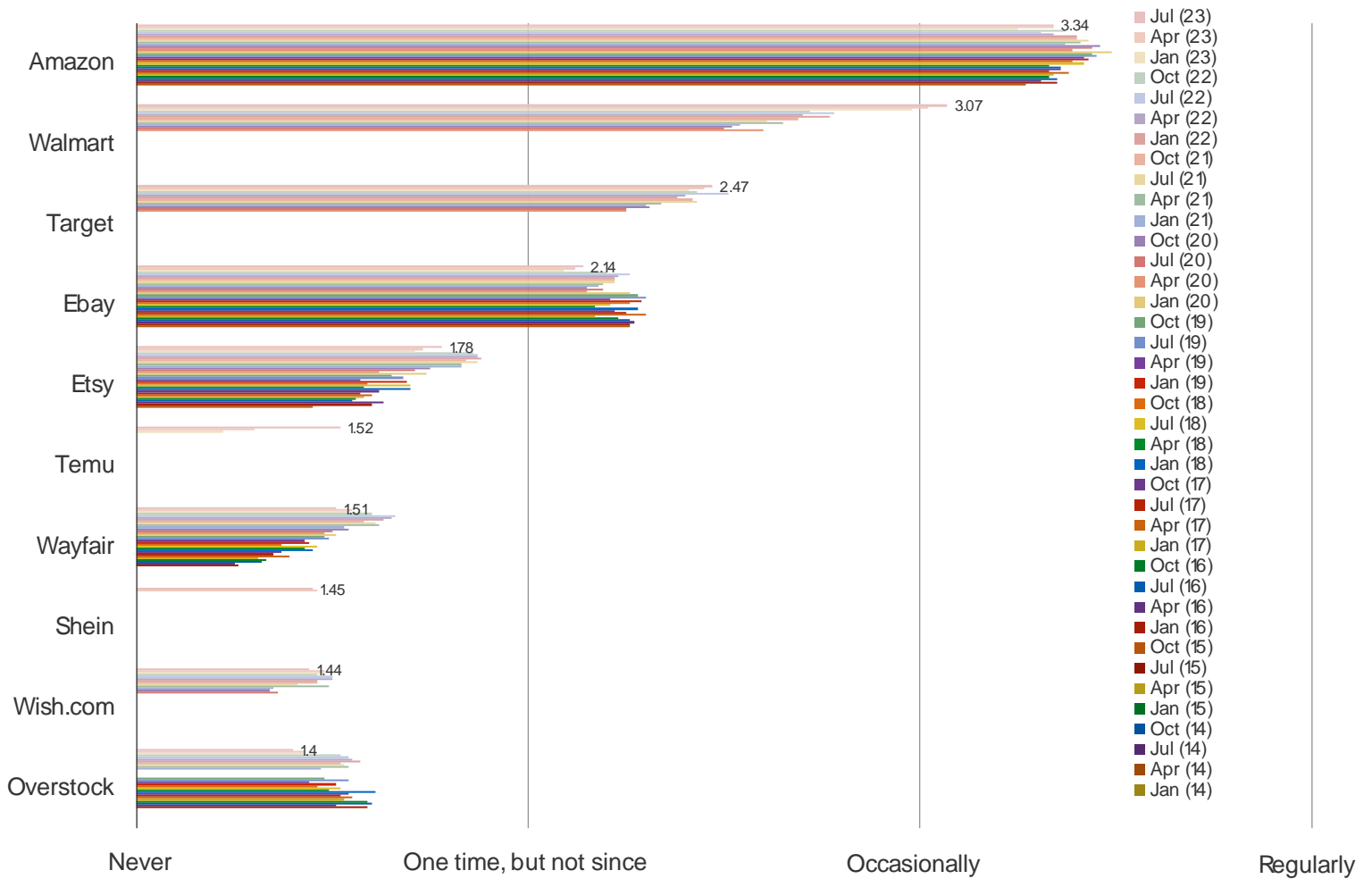
Posed to respondents who are aware of each of the following platforms:



	N=
Etsy	821
Amazon	967
Ebay	914
Groupon	715
Overstock	712
Wayfair	803
Wish.com	600
Temu	614
Shein	495

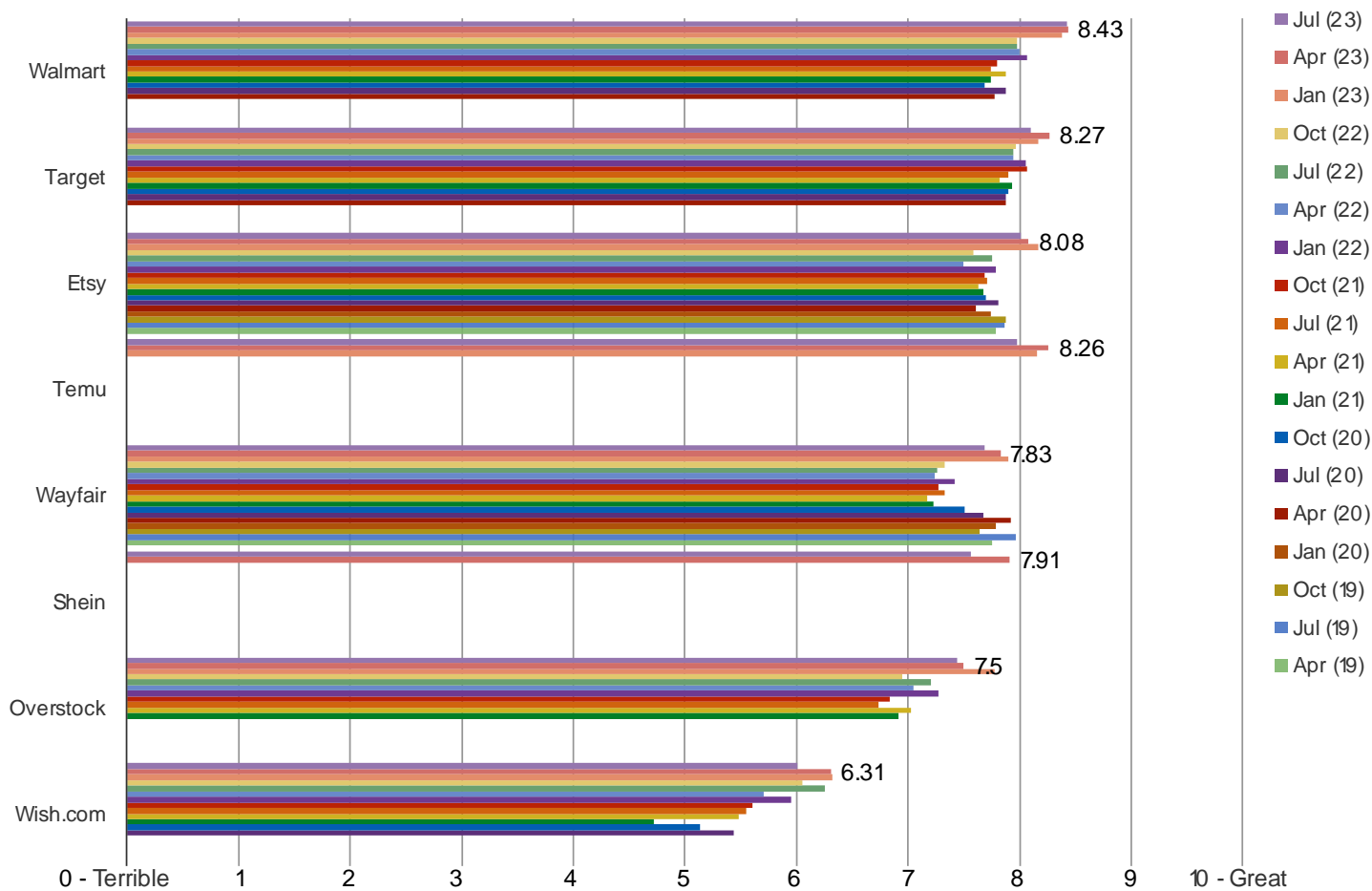
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH EACH OF THE FOLLOWING WEBSITES/APPS?

Posed to all respondents



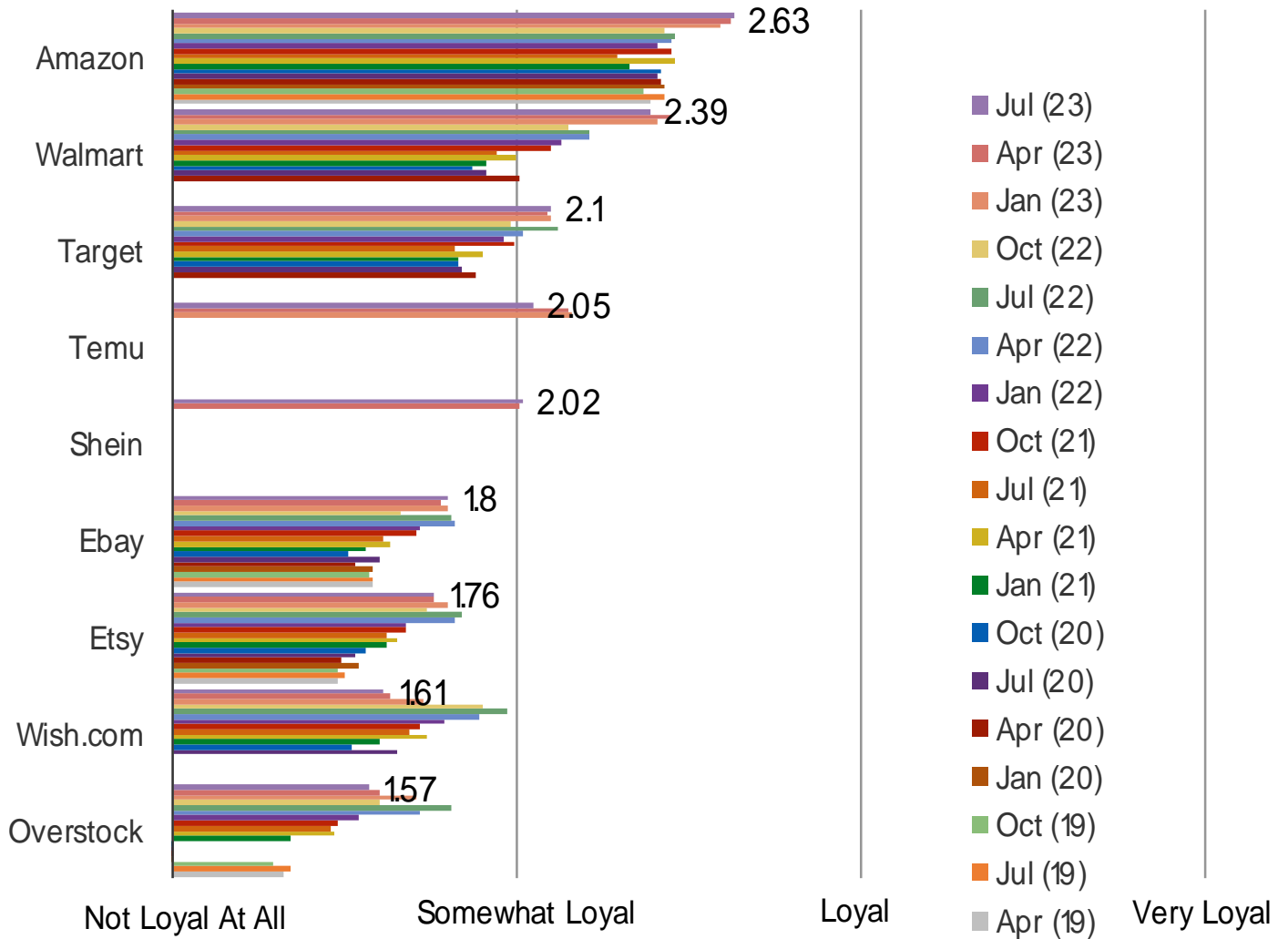
HOW DO YOU FIND THE SHIPPING EXPERIENCE WITH THIS APP/SITE?

Posed to users of each site/app



PLEASE RATE HOW LOYAL YOU ARE TO THIS APP/SITE FOR THE TYPES OF ITEMS YOU BUY FROM THEM:

Posed to users of each site/app



PLEASE RATE HOW LOYAL YOU ARE TO TEMU.

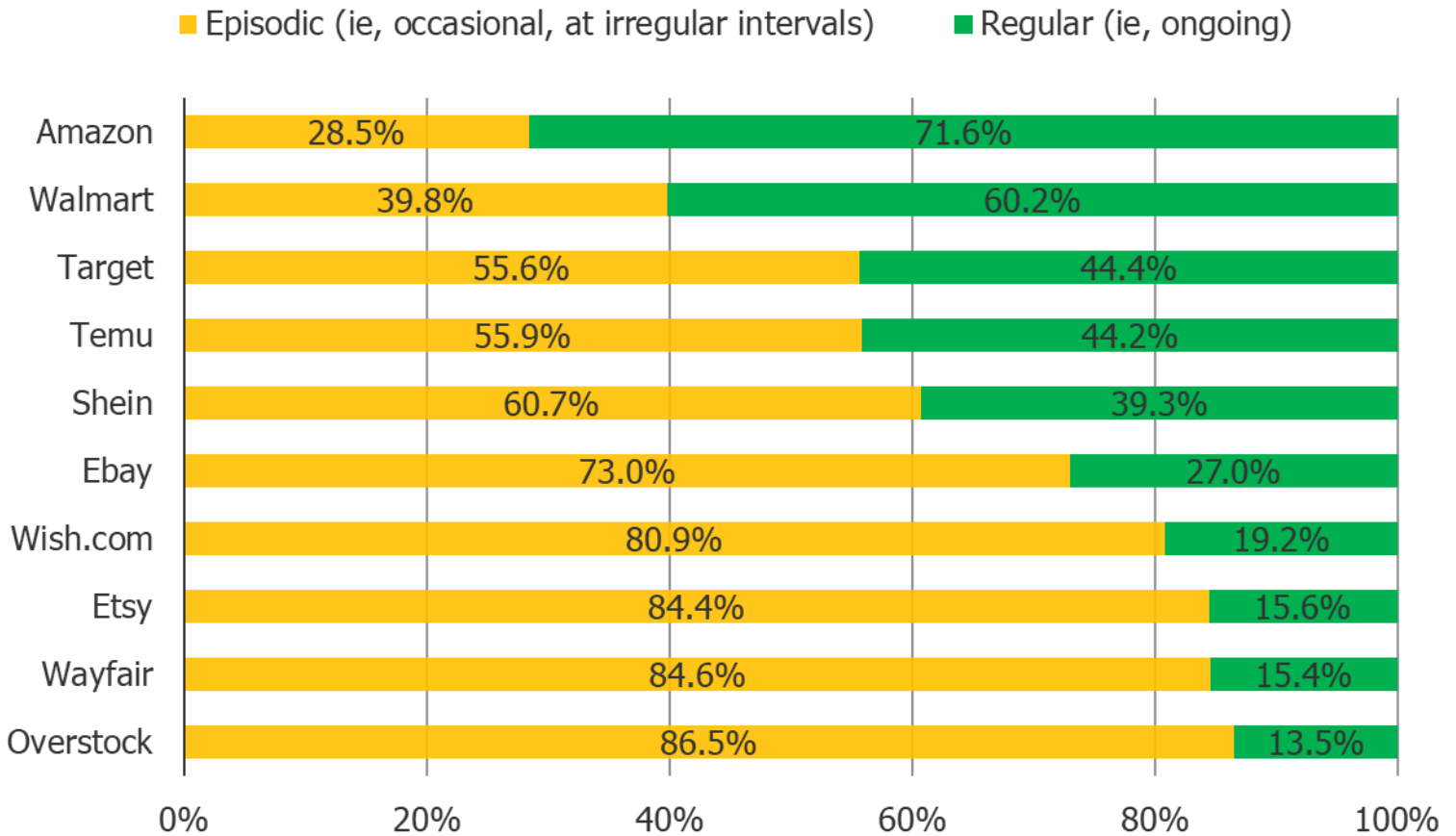
Posed to respondents who have shopped Temu.





WOULD YOU DESCRIBE YOUR USAGE OF THIS PLATFORM AS REGULAR (IE, ONGOING) OR EPISODIC (OCCASIONAL, AT IRREGULAR INTERVALS)

Posed to all respondents who shop the below.

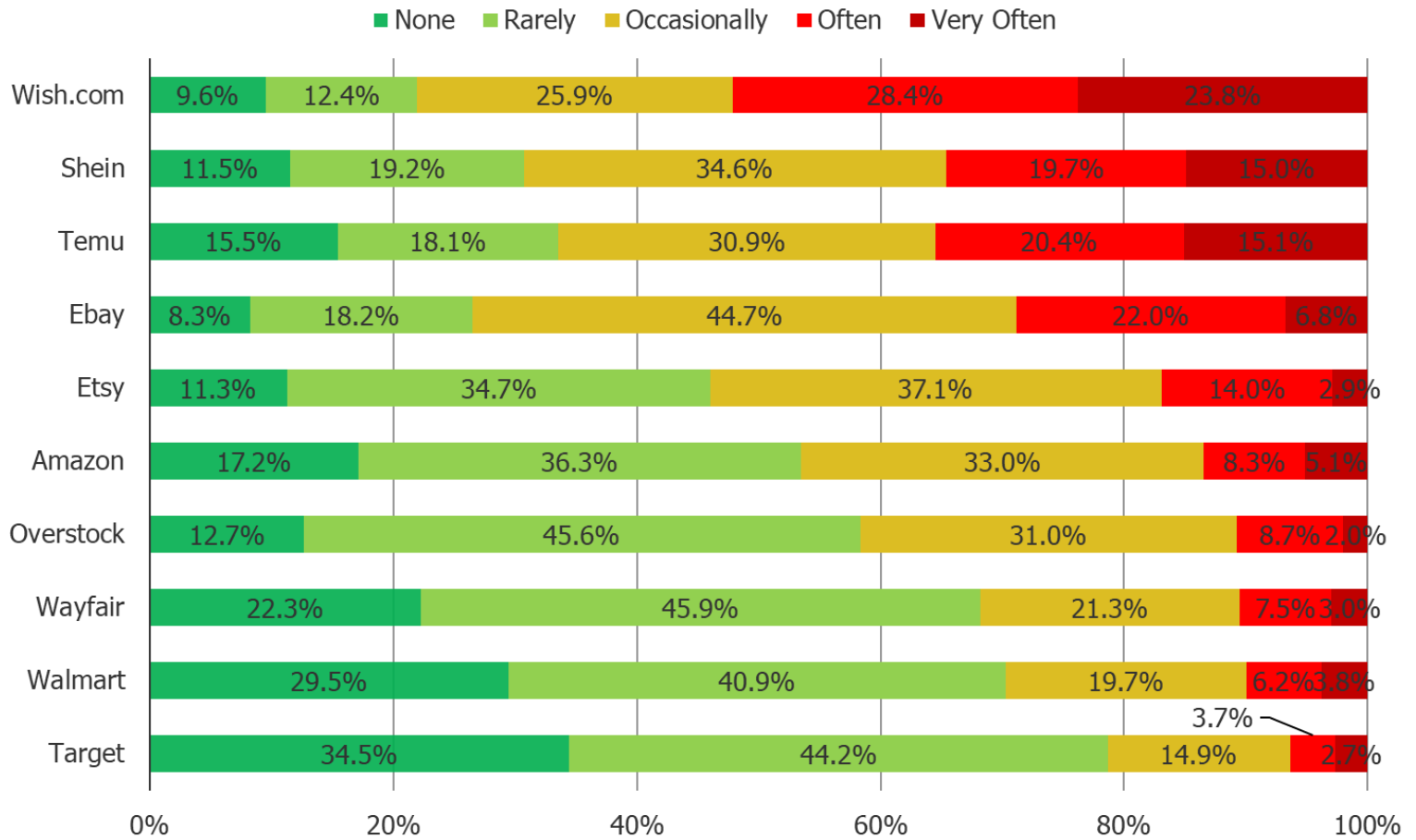


	N =
Amazon	914
Walmart	842
Target	676
Ebay	604
Etsy	450
Wayfair	305
Wish.com	282
Temu	265
Overstock	252
Shein	234



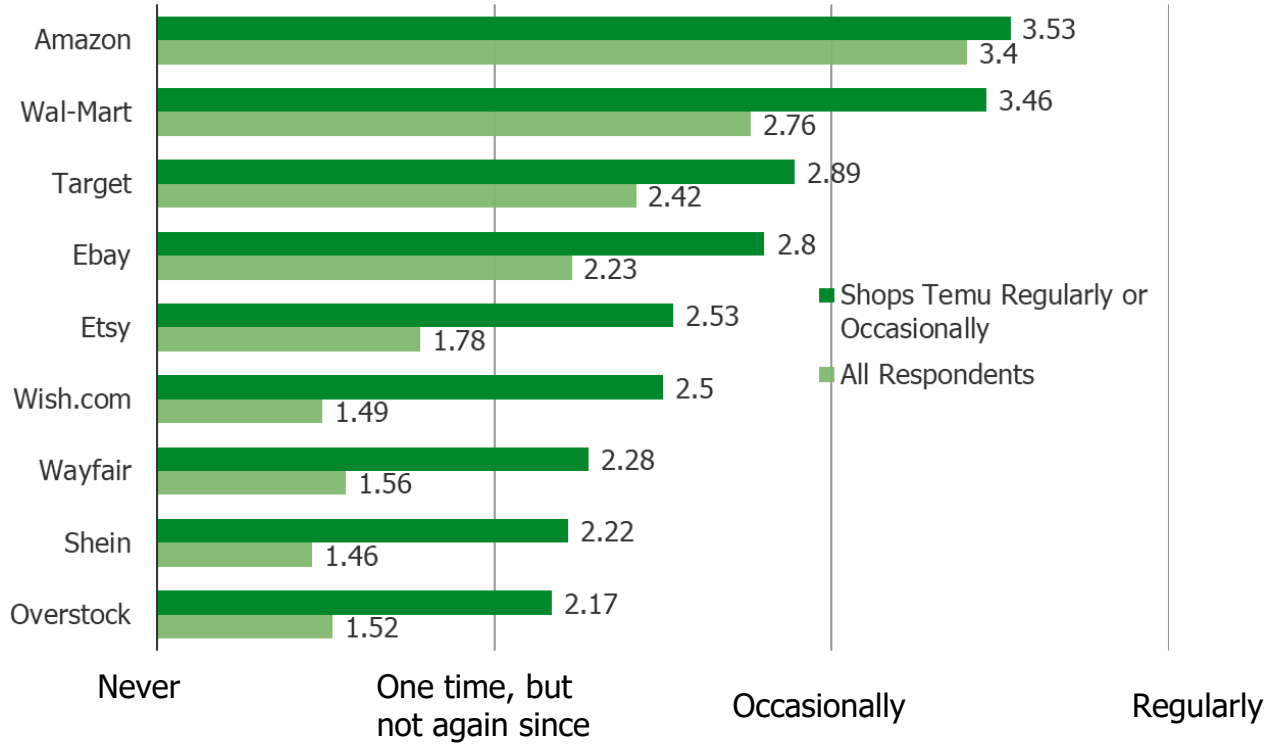
HOW OFTEN DO YOU THINK THERE ARE COUNTERFEIT / FAKE ITEMS BEING SOLD ON THIS PLATFORM?

Posed to all respondents who shop the below.

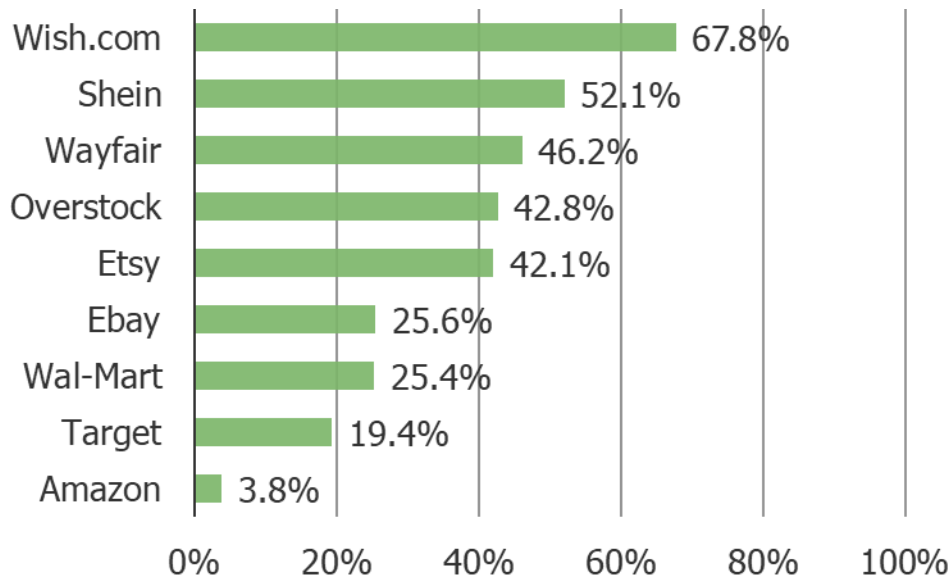


WHICH OF THE FOLLOWING DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH EACH OF THE FOLLOWING WEBSITES/APPS?

Posed to all respondents vs. respondents who are **Temu customers**. (N=196)

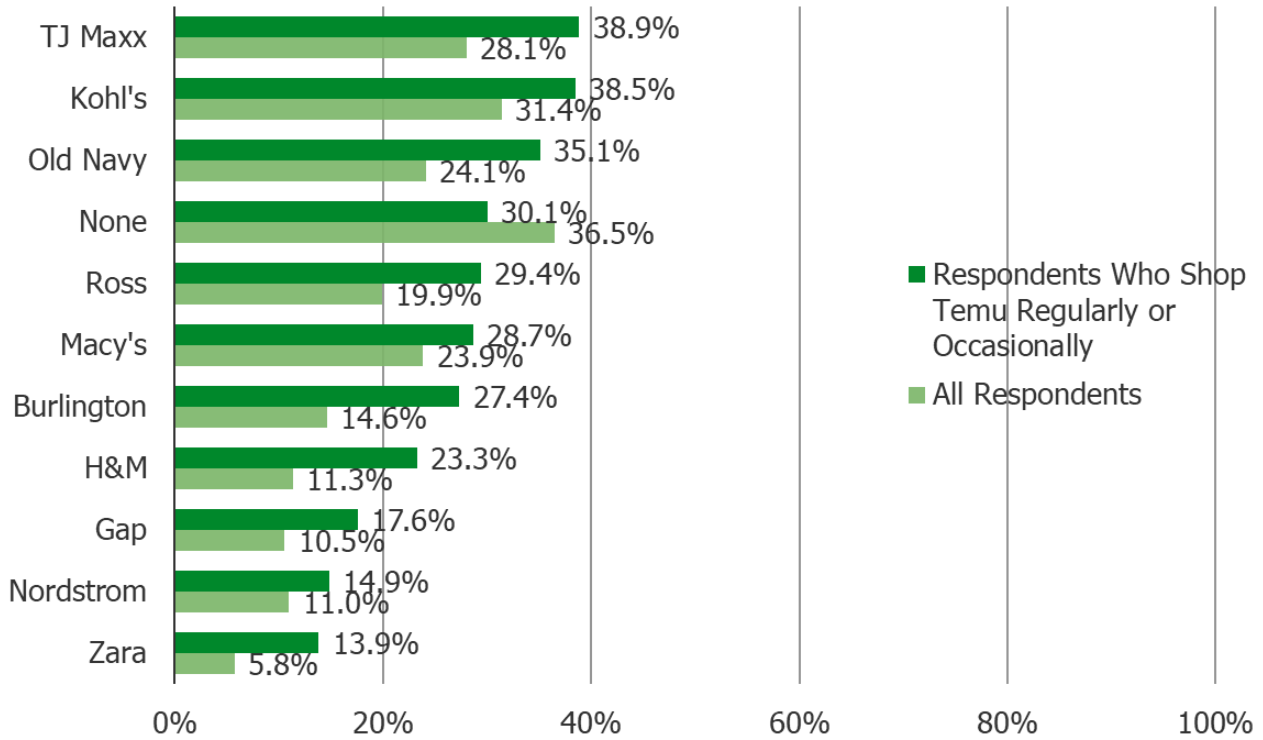


From chart above: % difference between All Respondents and **Temu customers**...

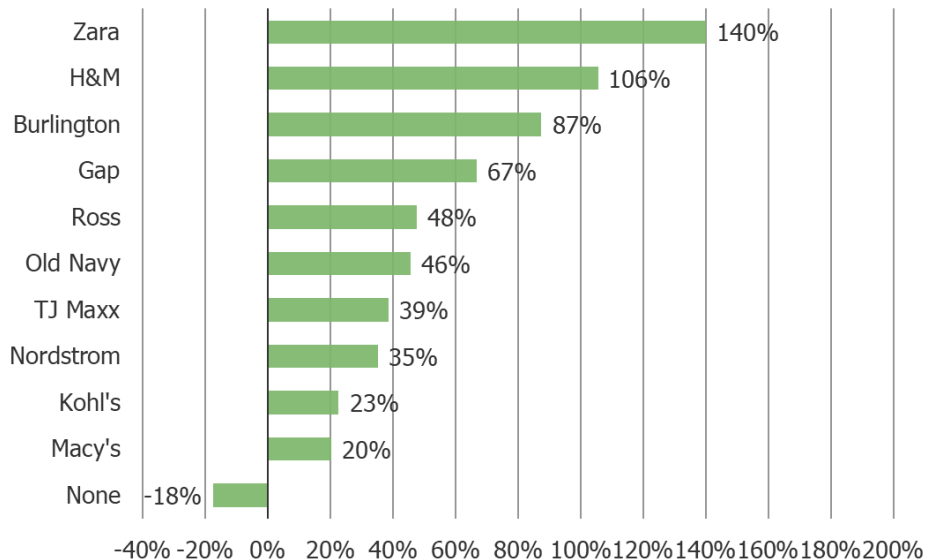


WHICH OF THE FOLLOWING WOULD YOU CONSIDER YOURSELF A CUSTOMER OF? IE- YOU REGULARLY OR OCCASIONALLY SHOP HERE. SELECT ALL THAT APPLY

Posed to all respondents vs. respondents who are **Temu customers.** (N=296)

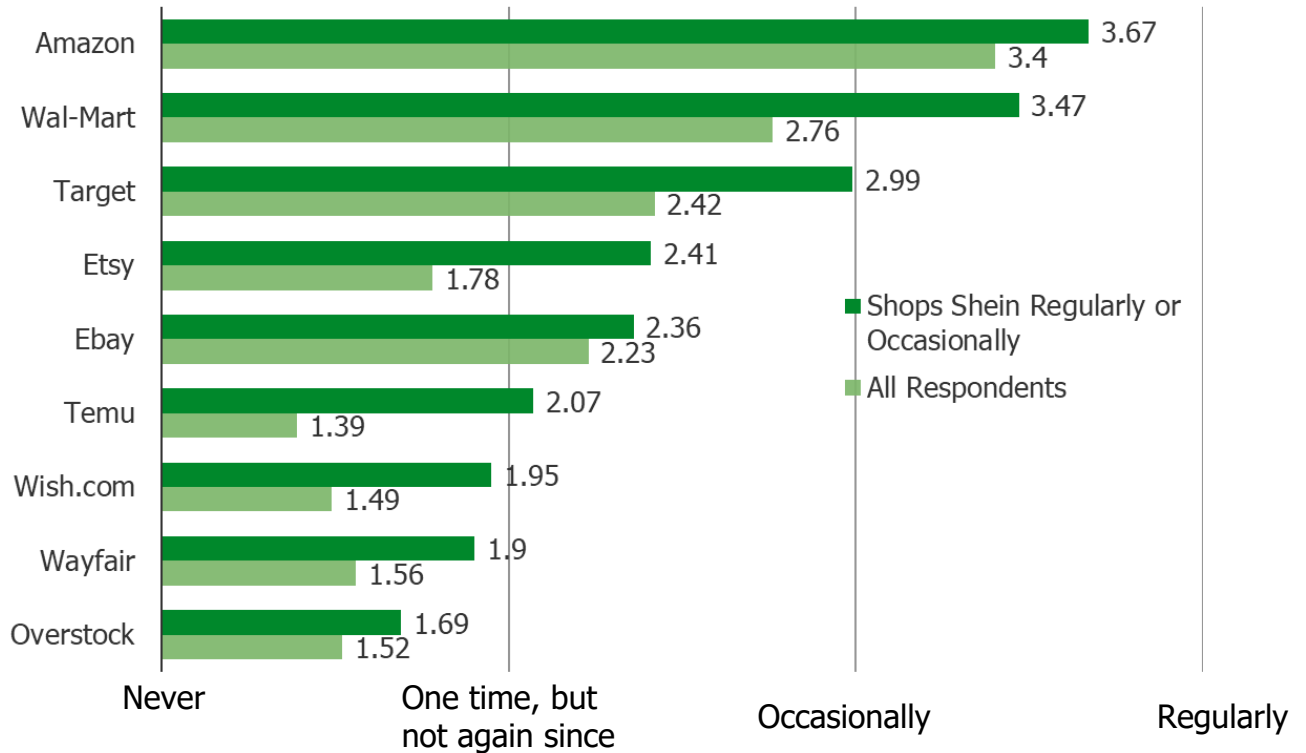


From chart above: % difference between All Respondents and **Temu customers...**

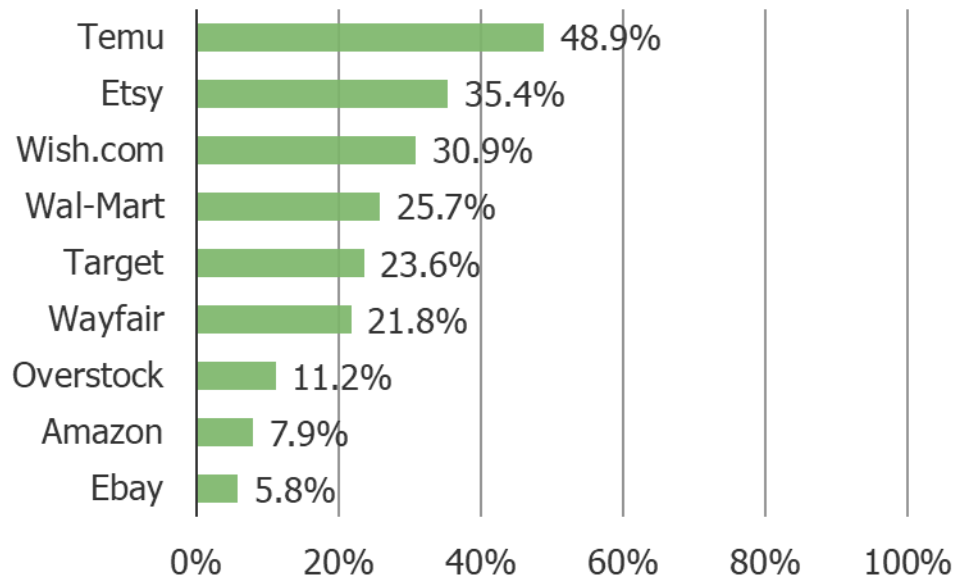


WHICH OF THE FOLLOWING DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH EACH OF THE FOLLOWING WEBSITES/APPS?

Posed to all respondents vs. respondents who are **Shein customers**. (N=148)

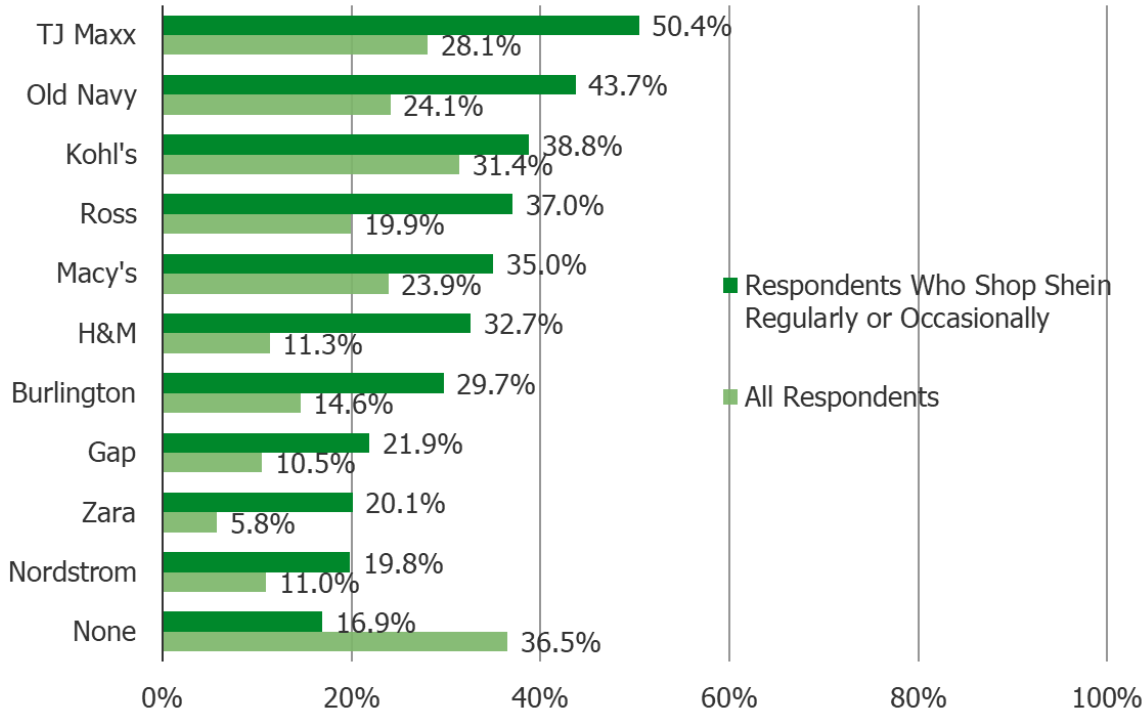


From chart above: % difference between All Respondents and **Shein customers**...

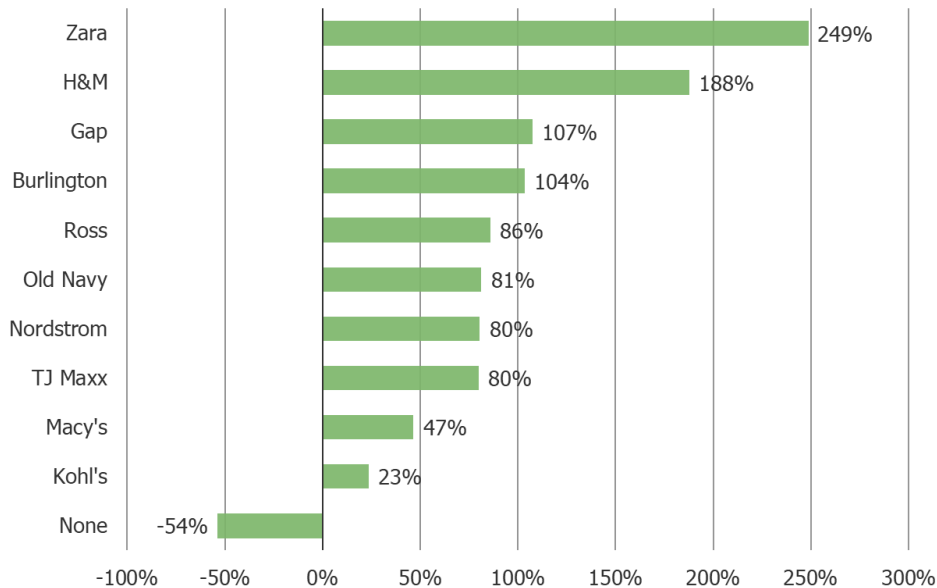


WHICH OF THE FOLLOWING WOULD YOU CONSIDER YOURSELF A CUSTOMER OF? IE- YOU REGULARLY OR OCCASIONALLY SHOP HERE. SELECT ALL THAT APPLY

Posed to all respondents vs. respondents who are **Shein customers.** (N=343)



From chart above: % difference between All Respondents and **Shein customers...**



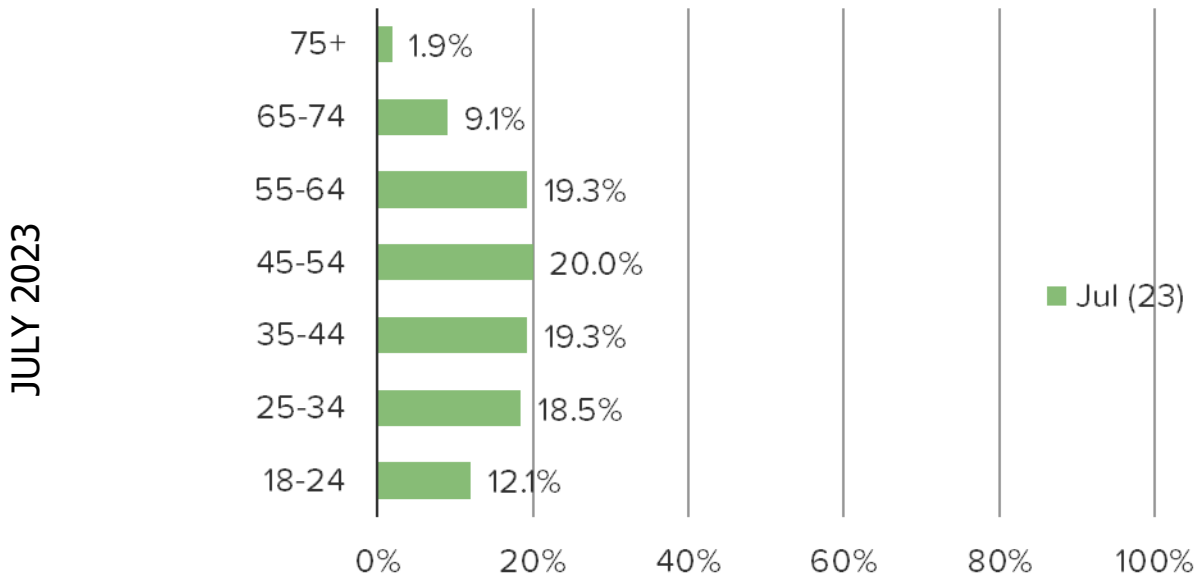
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# TEMU CUSTOMER DEMOGRAPHICS



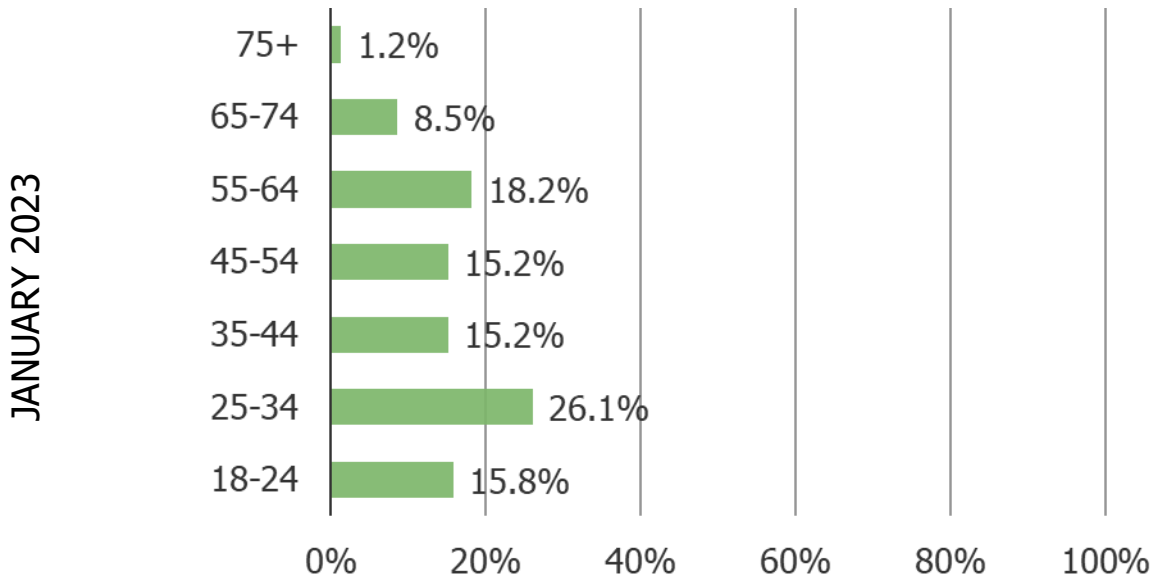
TEMU CUSTOMERS - AGE

Posed to all respondents who are Temu customers. (N=265)

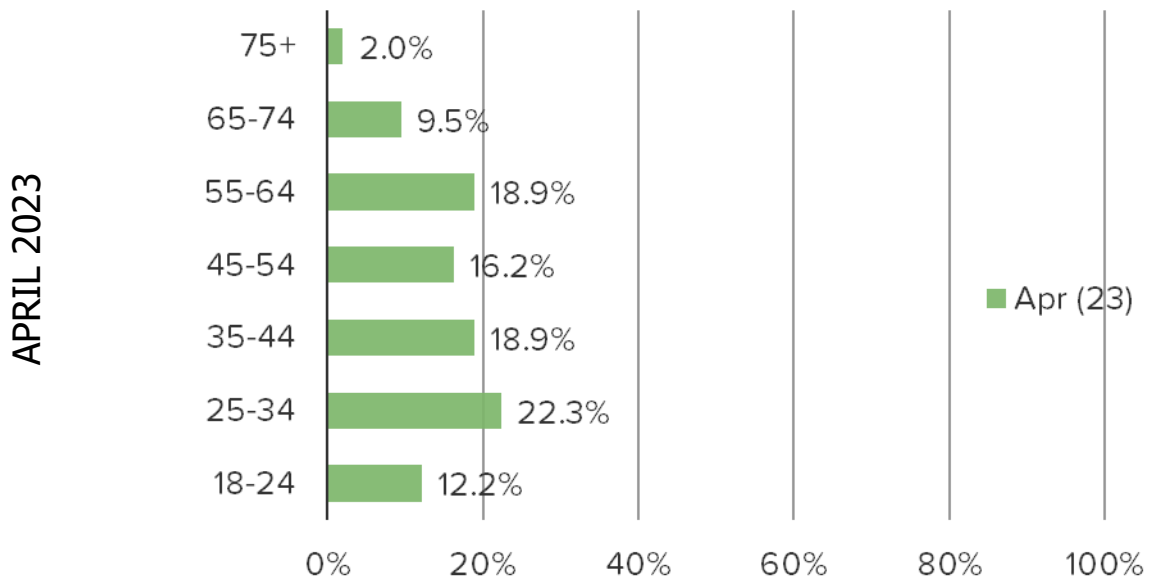


TEMU CUSTOMERS - AGE

Posed to all respondents who are Temu customers. (N=165)



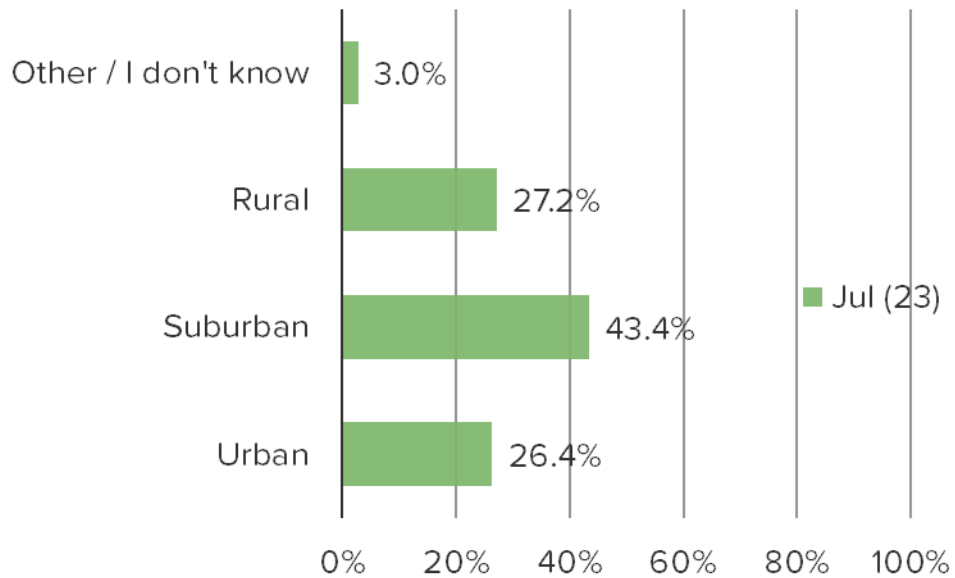
Posed to all respondents who are Temu customers. (N=148)



TEMU CUSTOMERS – TYPE OF AREA THEY LIVE IN

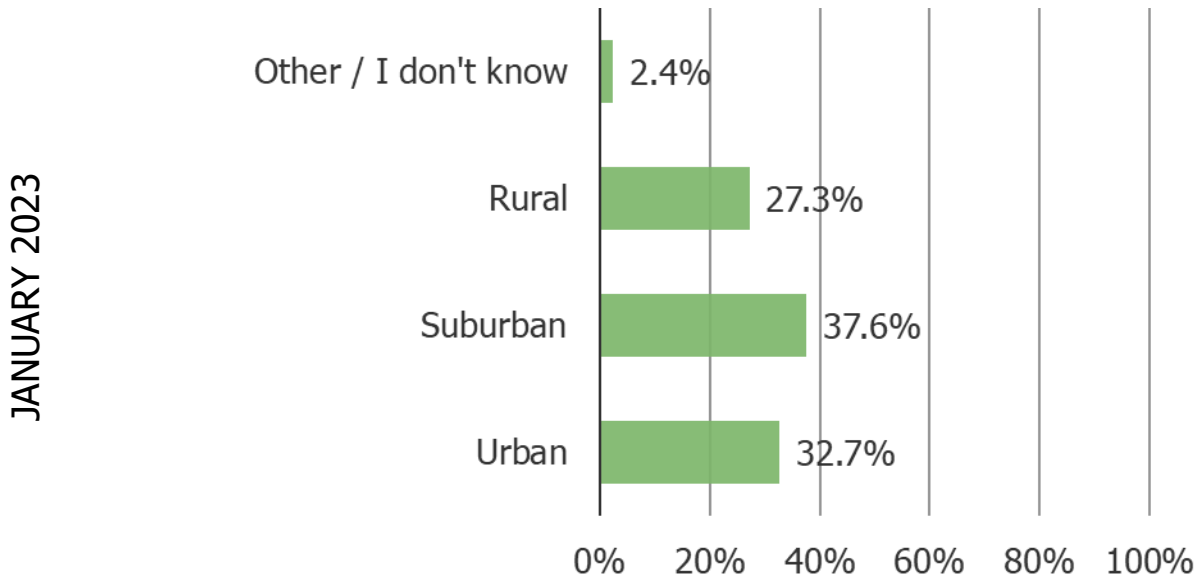
Posed to all respondents who are Temu customers. (N=265)

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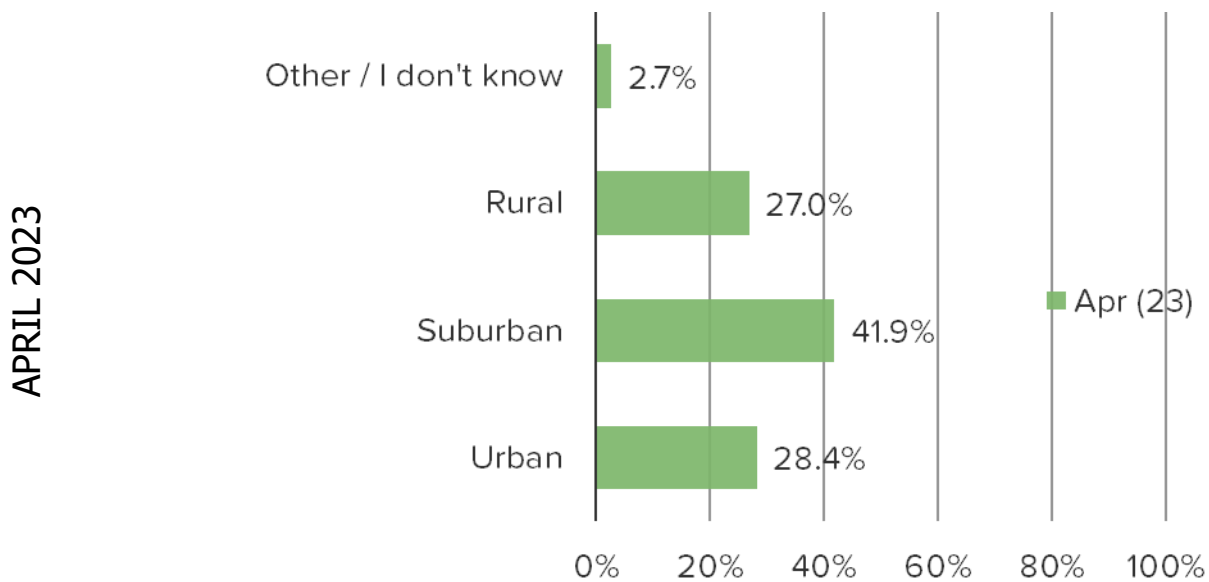


TEMU CUSTOMERS – TYPE OF AREA THEY LIVE IN

Posed to all respondents who are Temu customers. (N=165)

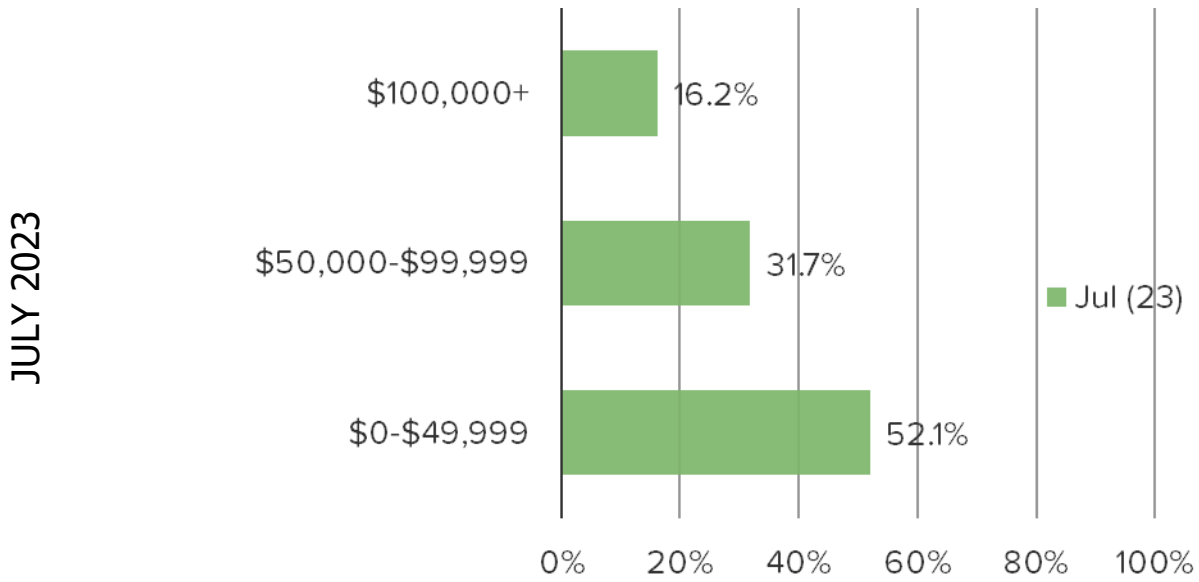


Posed to all respondents who are Temu customers. (N=148)



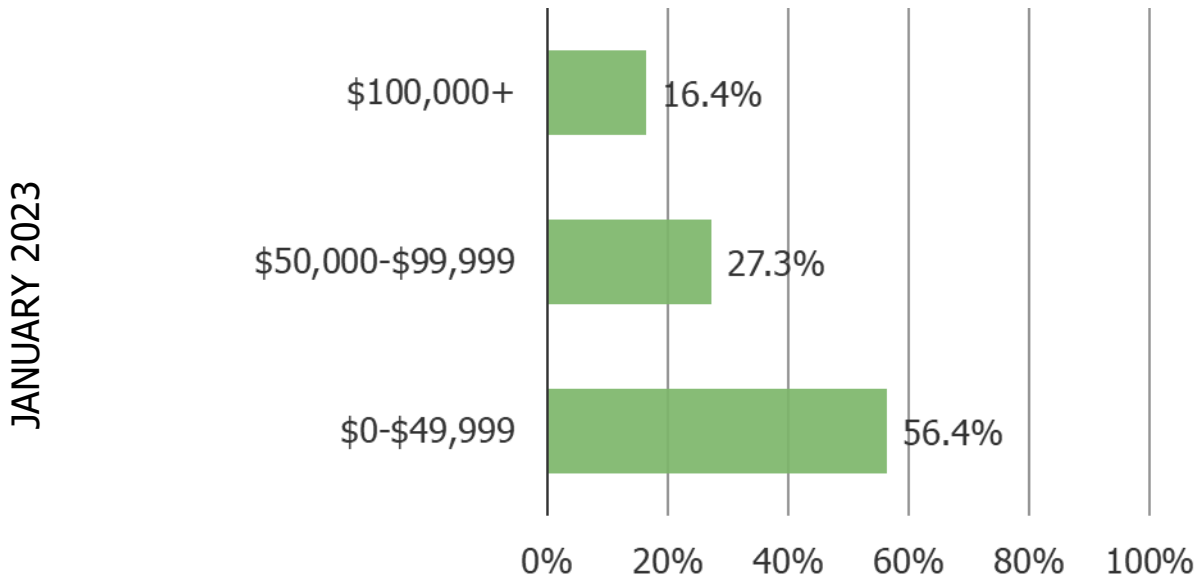
TEMU CUSTOMERS - INCOME

Posed to all respondents who are Temu customers. (N=265)

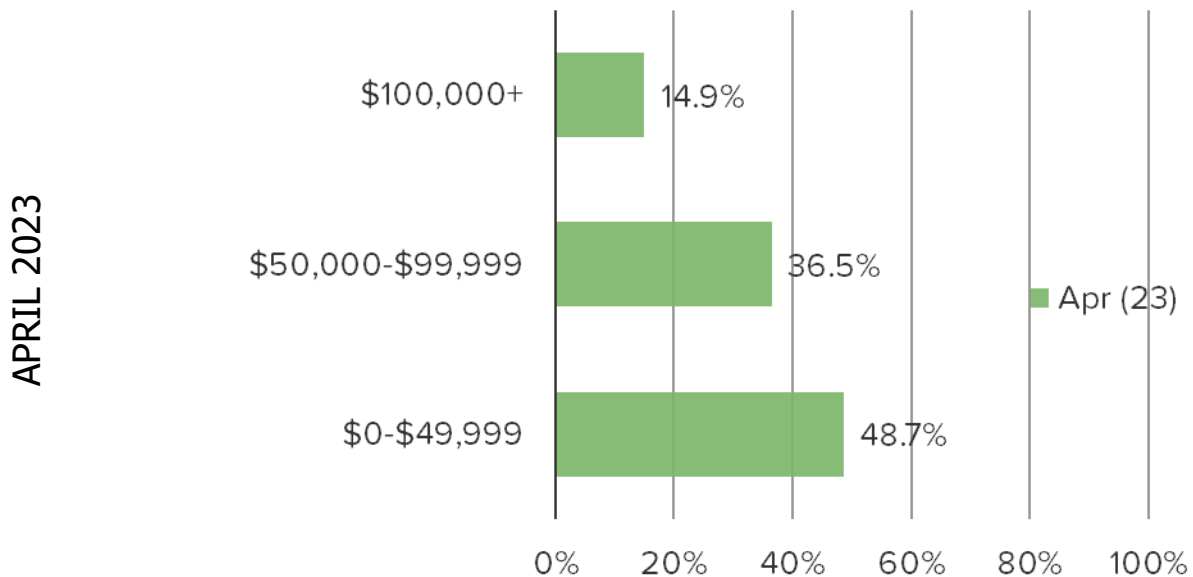


TEMU CUSTOMERS - INCOME

Posed to all respondents who are Temu customers. (N=165)

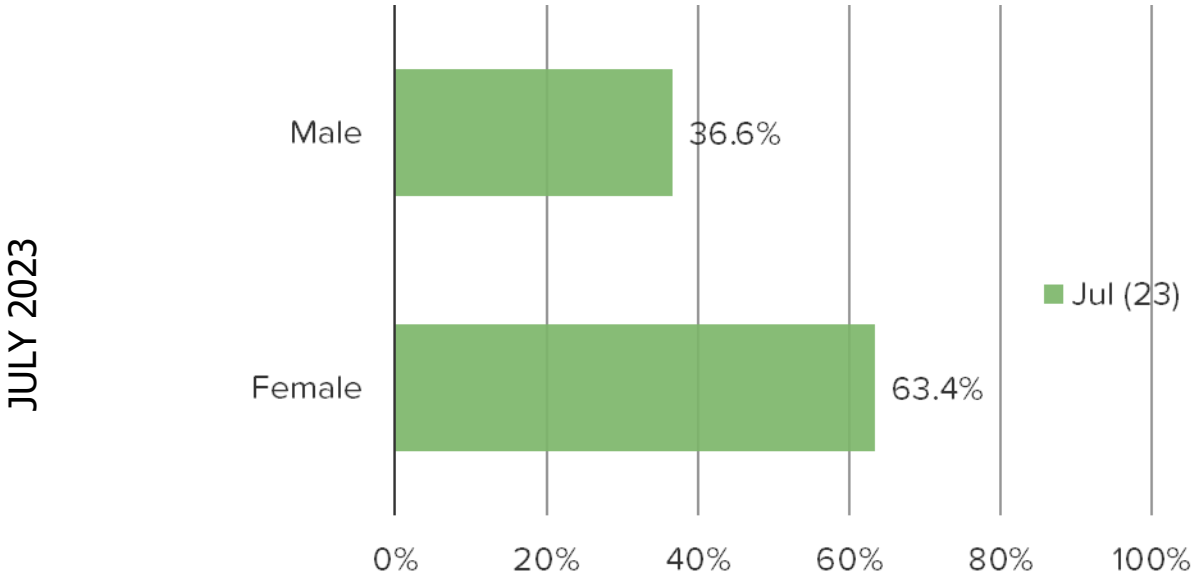


Posed to all respondents who are Temu customers. (N=148)



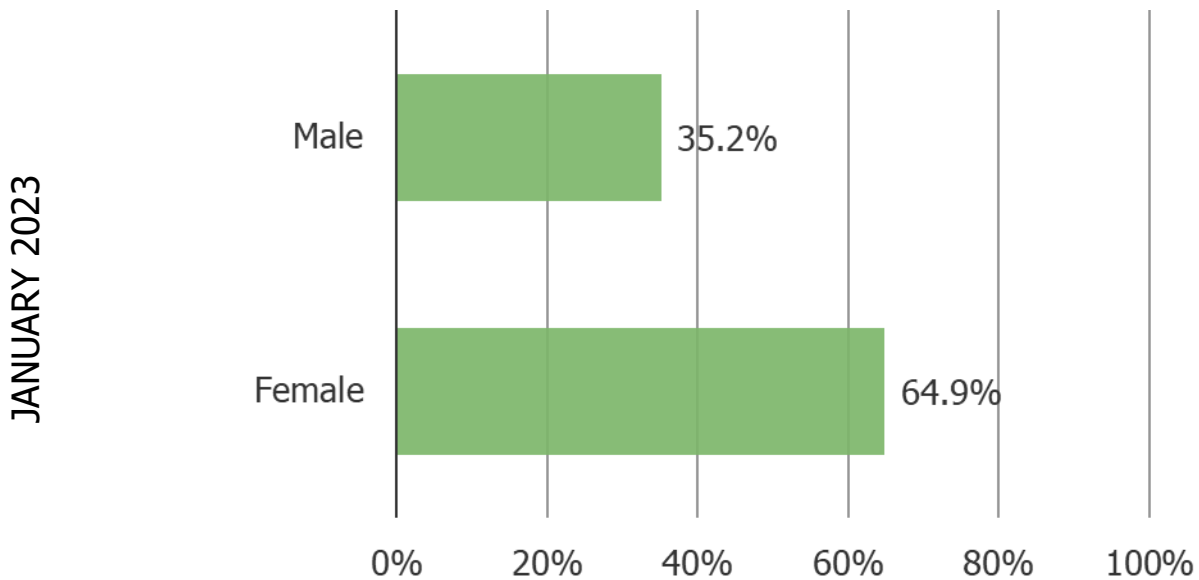
TEMU CUSTOMERS - GENDER

Posed to all respondents who are Temu customers. (N=265)

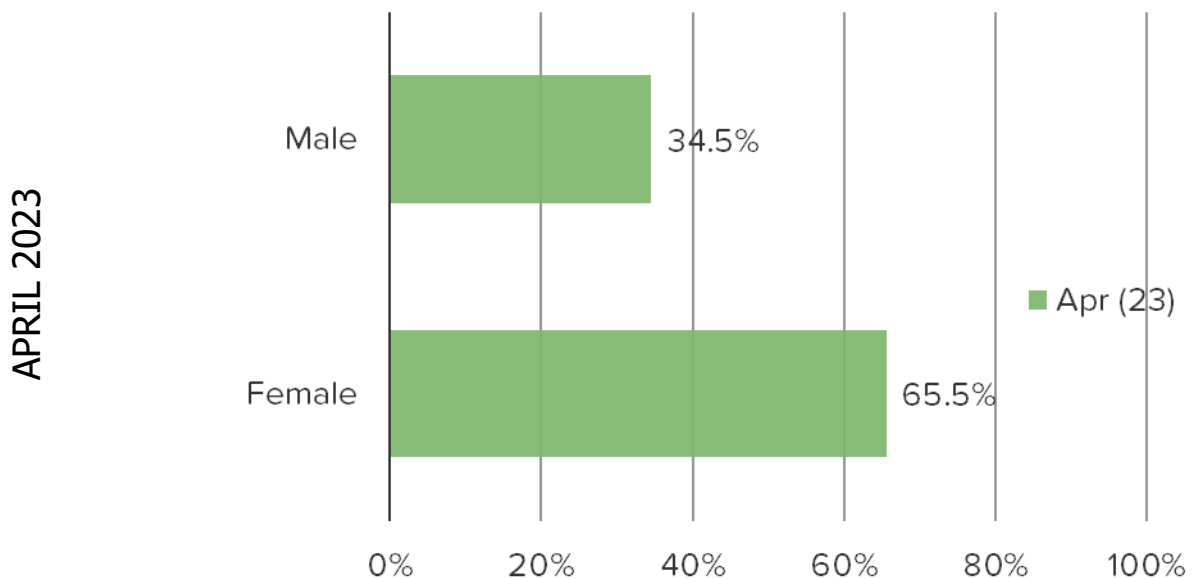


TEMU CUSTOMERS - GENDER

Posed to all respondents who are Temu customers. (N=165)



Posed to all respondents who are Temu customers. (N=148)

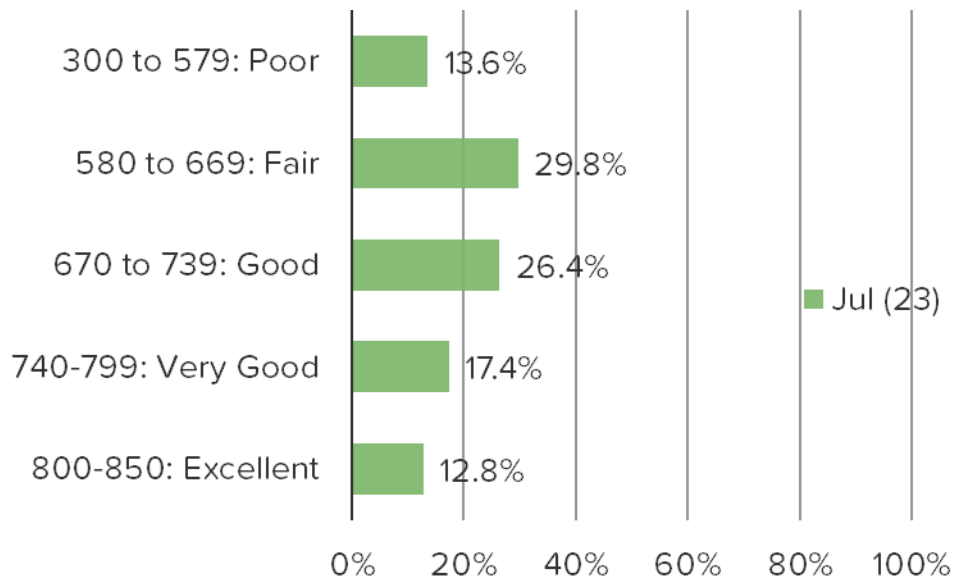




TEMU CUSTOMERS - CREDIT SCORE

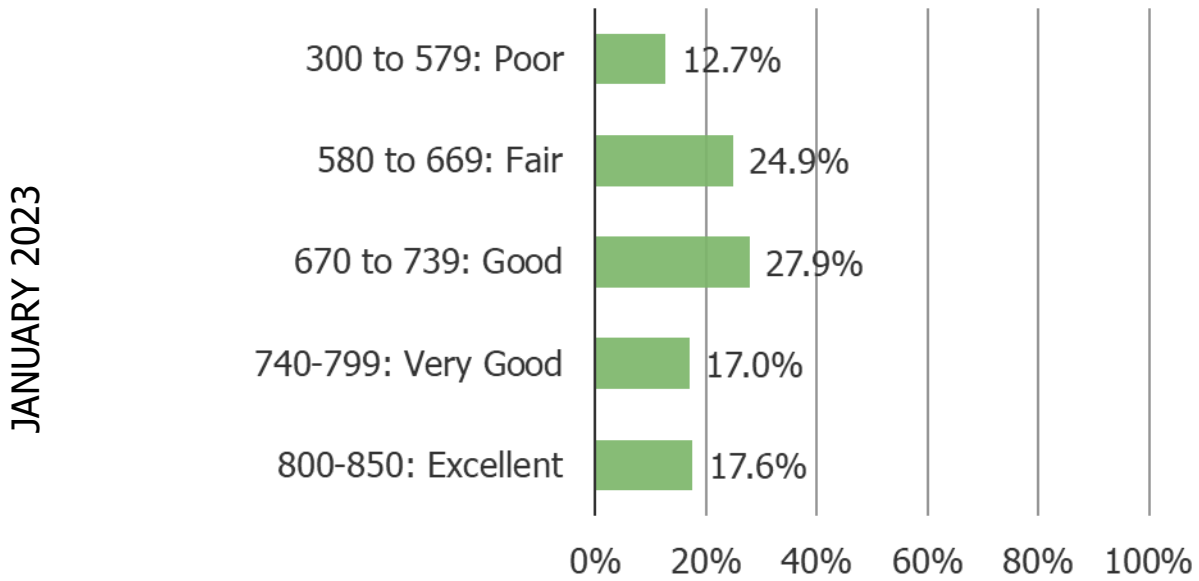
Posed to all respondents who are Temu customers. (N=265)

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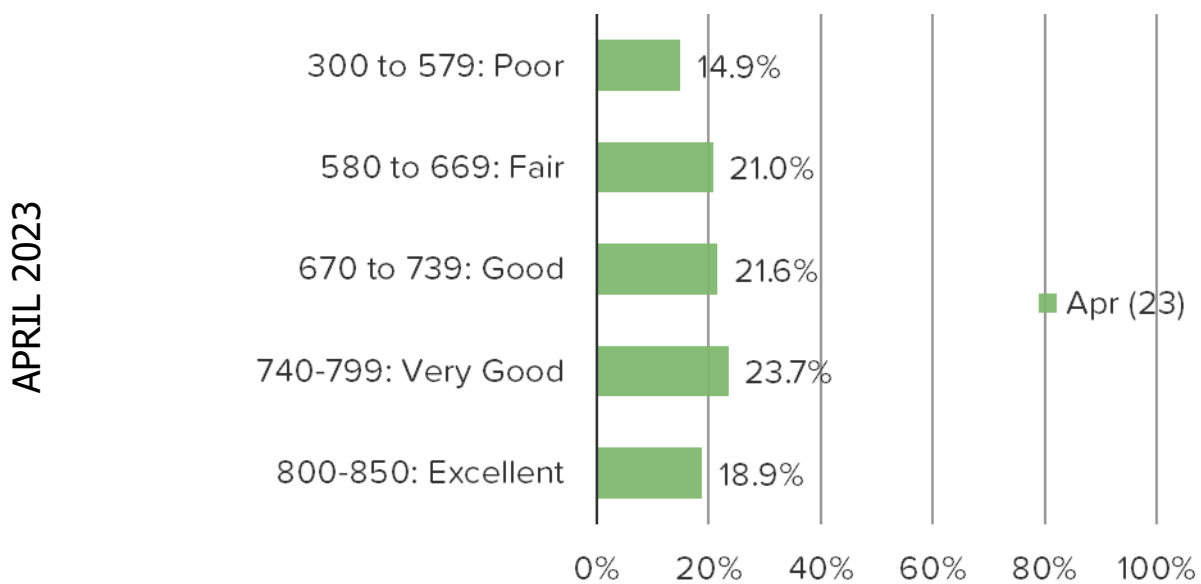


TEMU CUSTOMERS - CREDIT SCORE

Posed to all respondents who are Temu customers. (N=165)

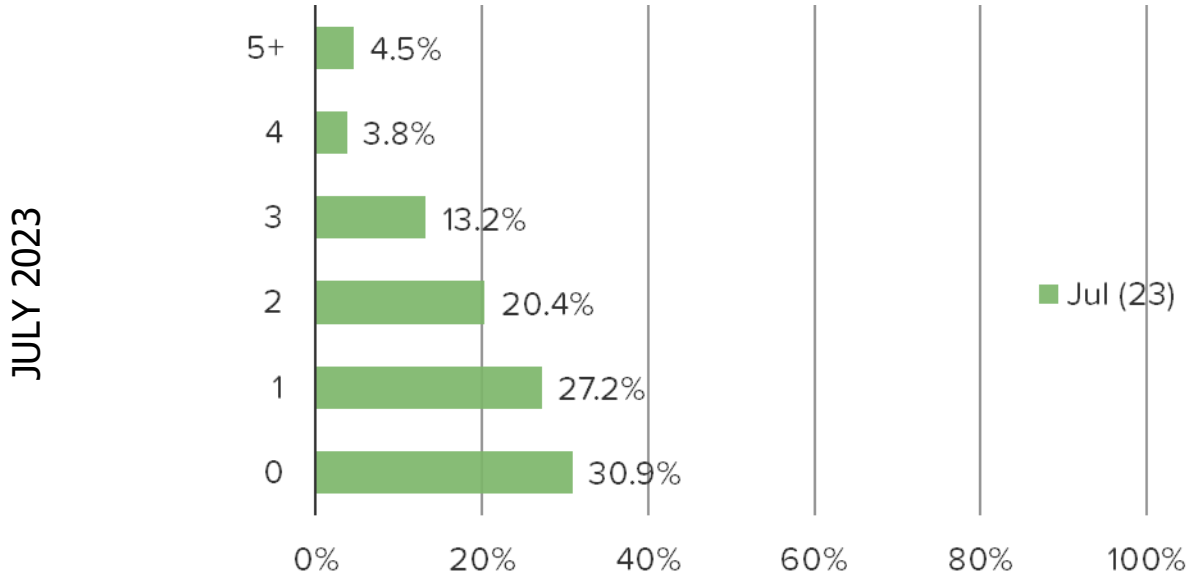


Posed to all respondents who are Temu customers. (N=148)



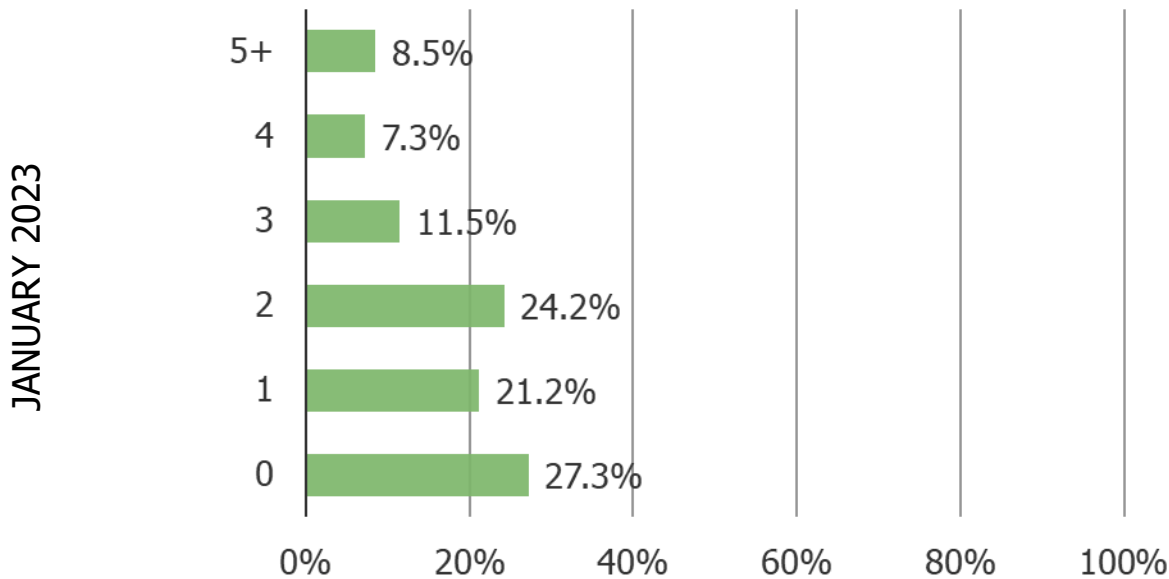
TEMU CUSTOMERS - HOW MANY CREDIT CARDS DO YOU HAVE?

Posed to all respondents who are Temu customers. (N=265)

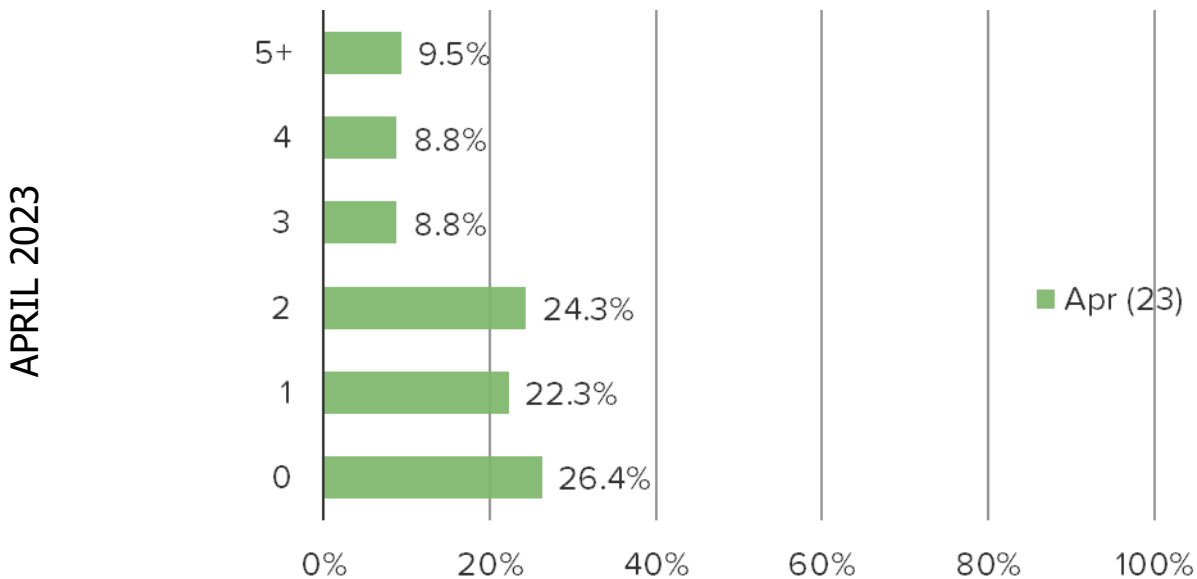


TEMU CUSTOMERS - HOW MANY CREDIT CARDS DO YOU HAVE?

Posed to all respondents who are Temu customers. (N=165)



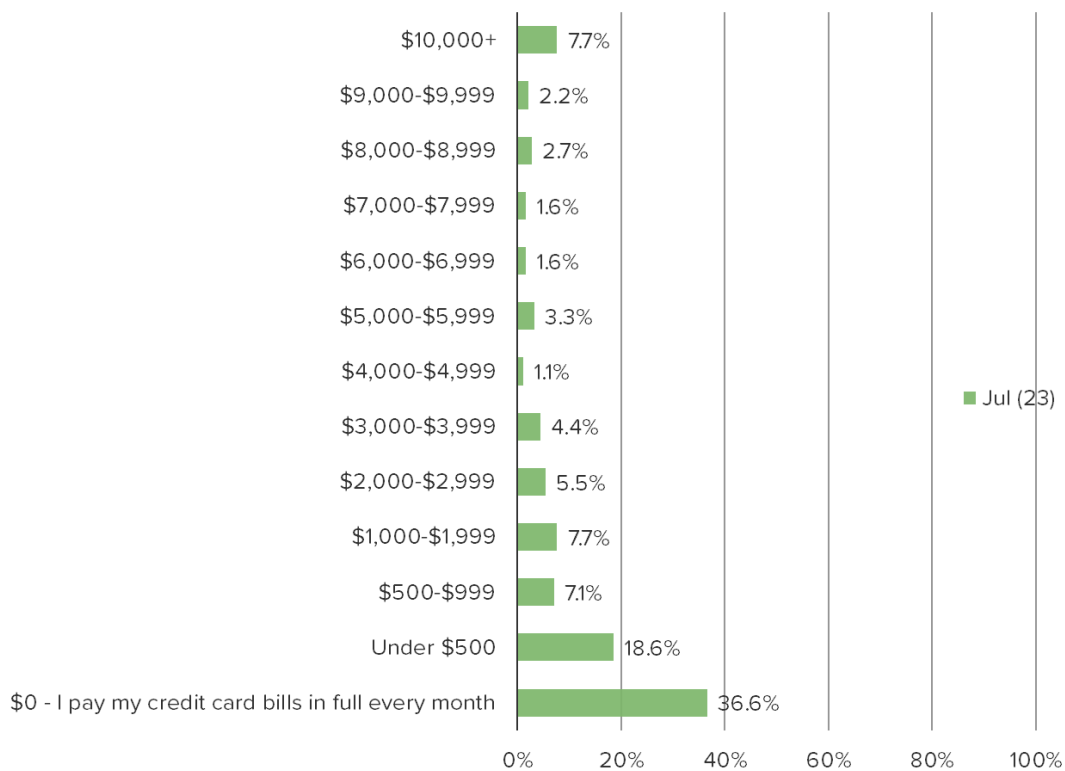
Posed to all respondents who are Temu customers. (N=148)



TEMU CUSTOMERS - HOW MUCH CREDIT CARD DEBT DO YOU HAVE? IE – HOW MUCH OF AN OUTSTANDING BALANCE DO YOU CARRY OVER FROM MONTH TO MONTH?

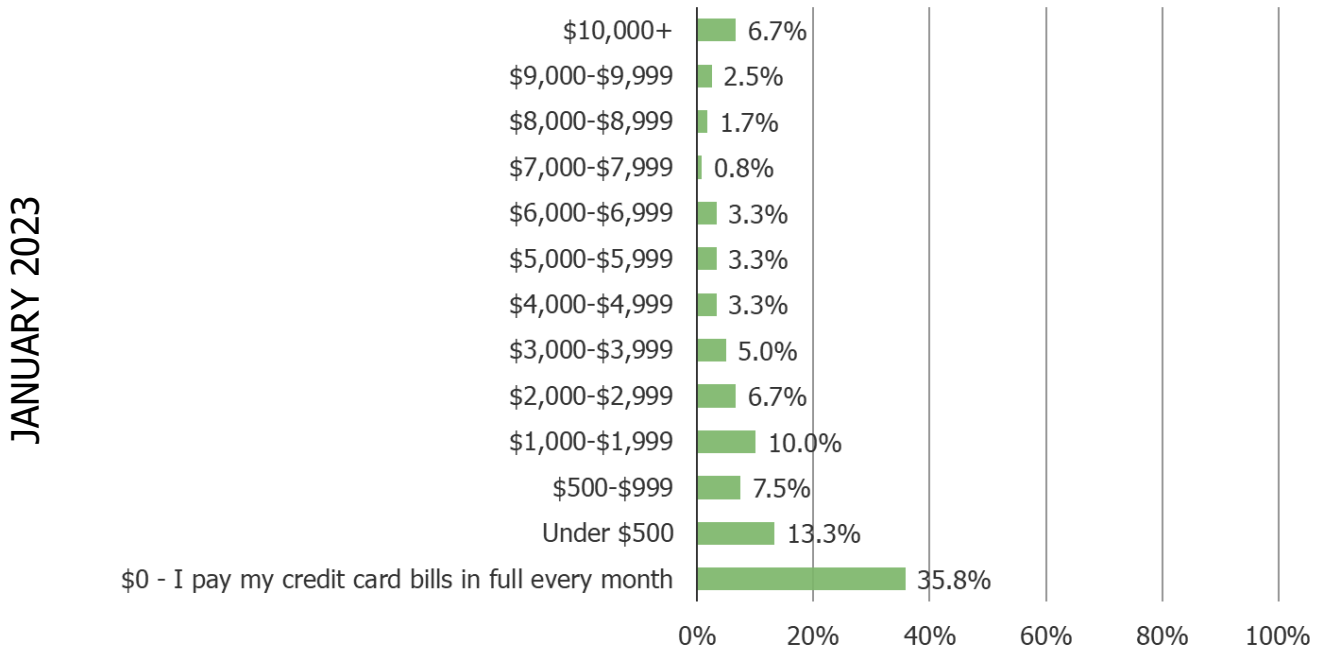
Posed to credit card users who are Temu customers. (N=183)

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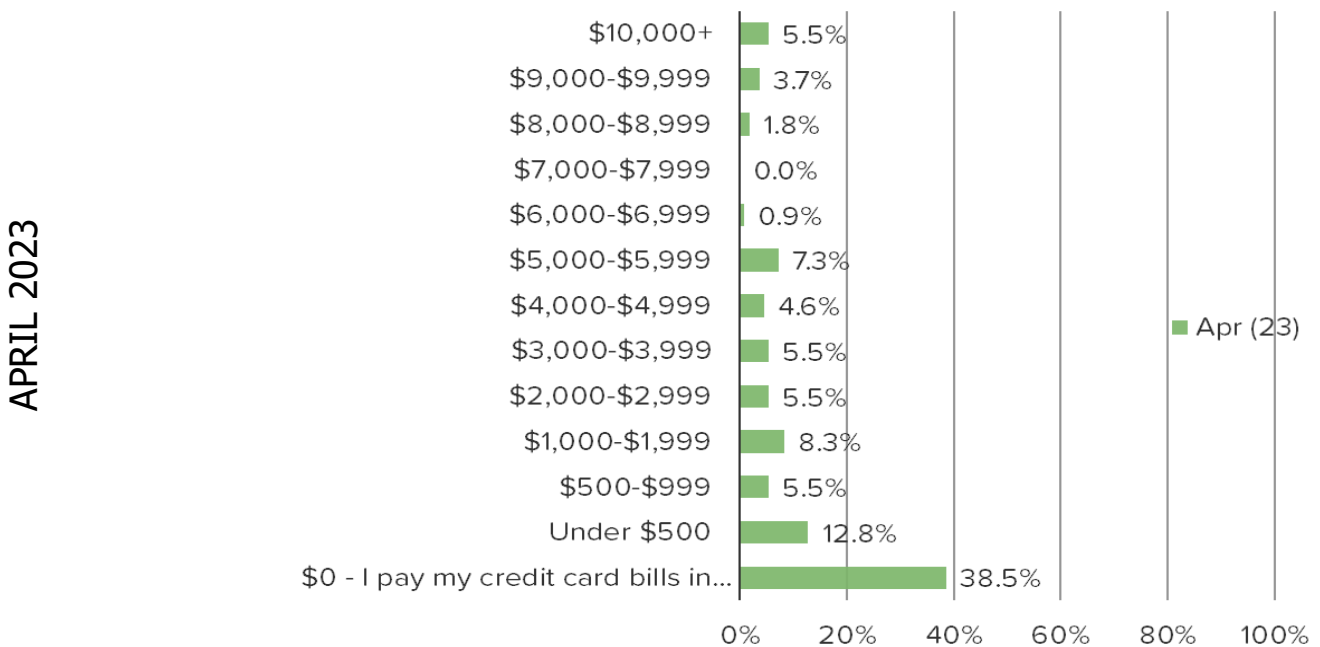


TEMU CUSTOMERS - HOW MUCH CREDIT CARD DEBT DO YOU HAVE? IE – HOW MUCH OF AN OUTSTANDING BALANCE DO YOU CARRY OVER FROM MONTH TO MONTH?

Posed to credit card users who are Temu customers. (N=165)



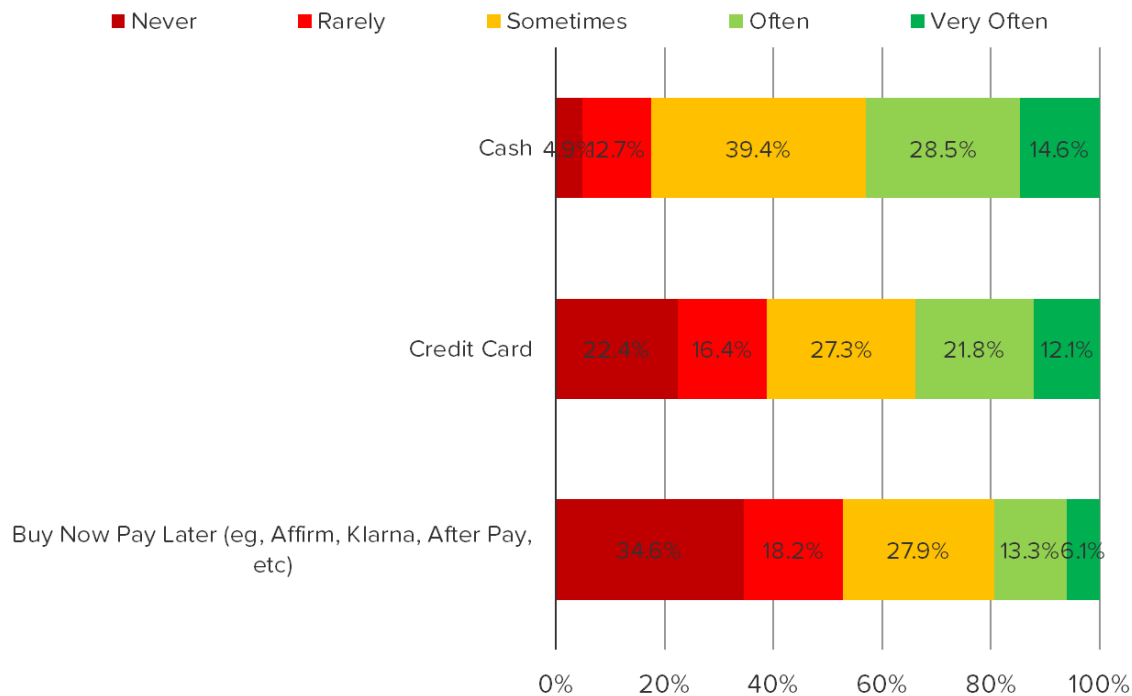
Posed to all respondents who are Temu customers. (N=148)



TEMU CUSTOMERS - HOW FREQUENTLY DO YOU USE THE FOLLOWING TO SPEND MONEY?

Posed to all respondents who are Temu customers. (N=165)

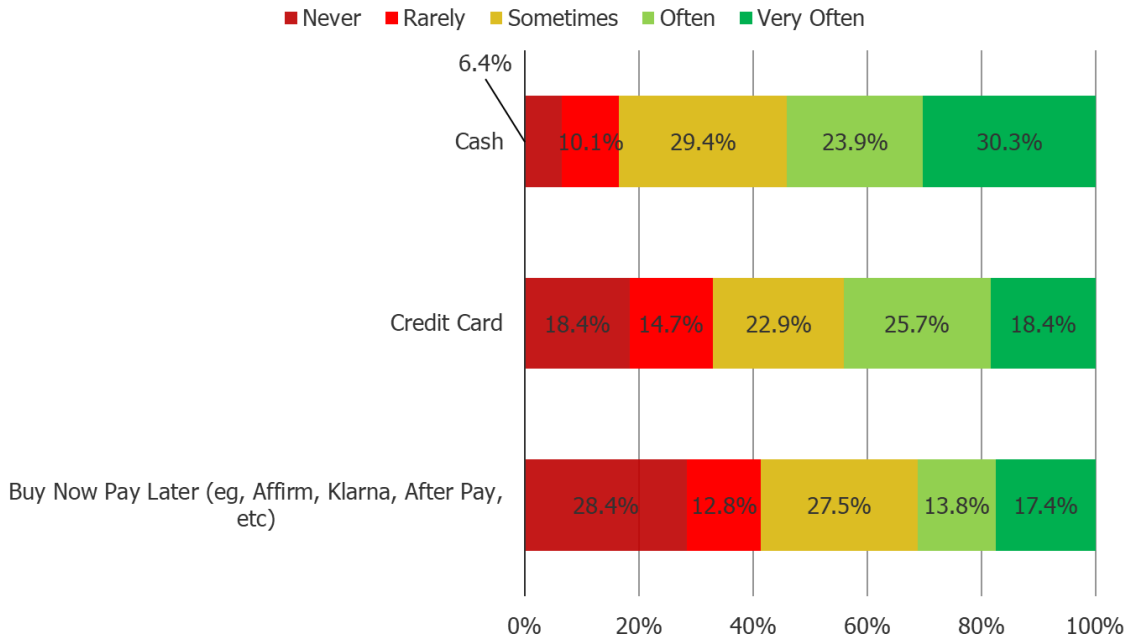
JULY 2023



TEMU CUSTOMERS - HOW FREQUENTLY DO YOU USE THE FOLLOWING TO SPEND MONEY?

Posed to all respondents who are Temu customers. (N=165)

JANUARY 2023



Posed to all respondents who are Temu customers. (N=148)

APRIL 2023

