

Bespoke Intel

CHINA SURVEY UPDATE

Retail, Tech, and Macro Trends

FEBRUARY 2024

***Note, sample skews more toward Tier 1/2/3 cities.**

BACKGROUND

- ❑ Survey of 1,532 US Consumers, balanced to census demographically.

FINDINGS:

1. Covid concerns have increased very slightly q/q, but remain off of highs.
2. Consumer confidence has dropped q/q.
3. The share of consumers who say they are increasing their spend has also declined q/q.
4. The share who view China-US relations as negative has declined somewhat q/q.



I

- Covid Sentiment**
- Spending Confidence**
- China / US Relations**
- Food Delivery and Grocery**
- Autos and Tesla Demand**
- Casual Dining**
- Streaming**
- Luxury Goods**
- Athletic Apparel Brands**

How does COVID impact your daily life?

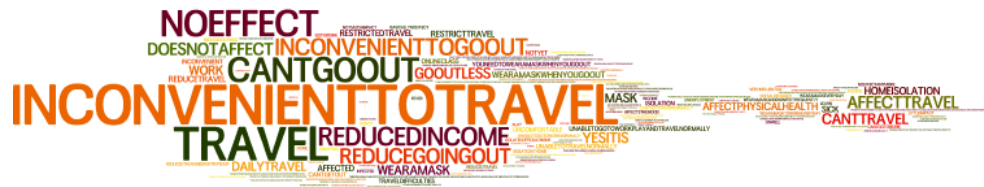
February 2024



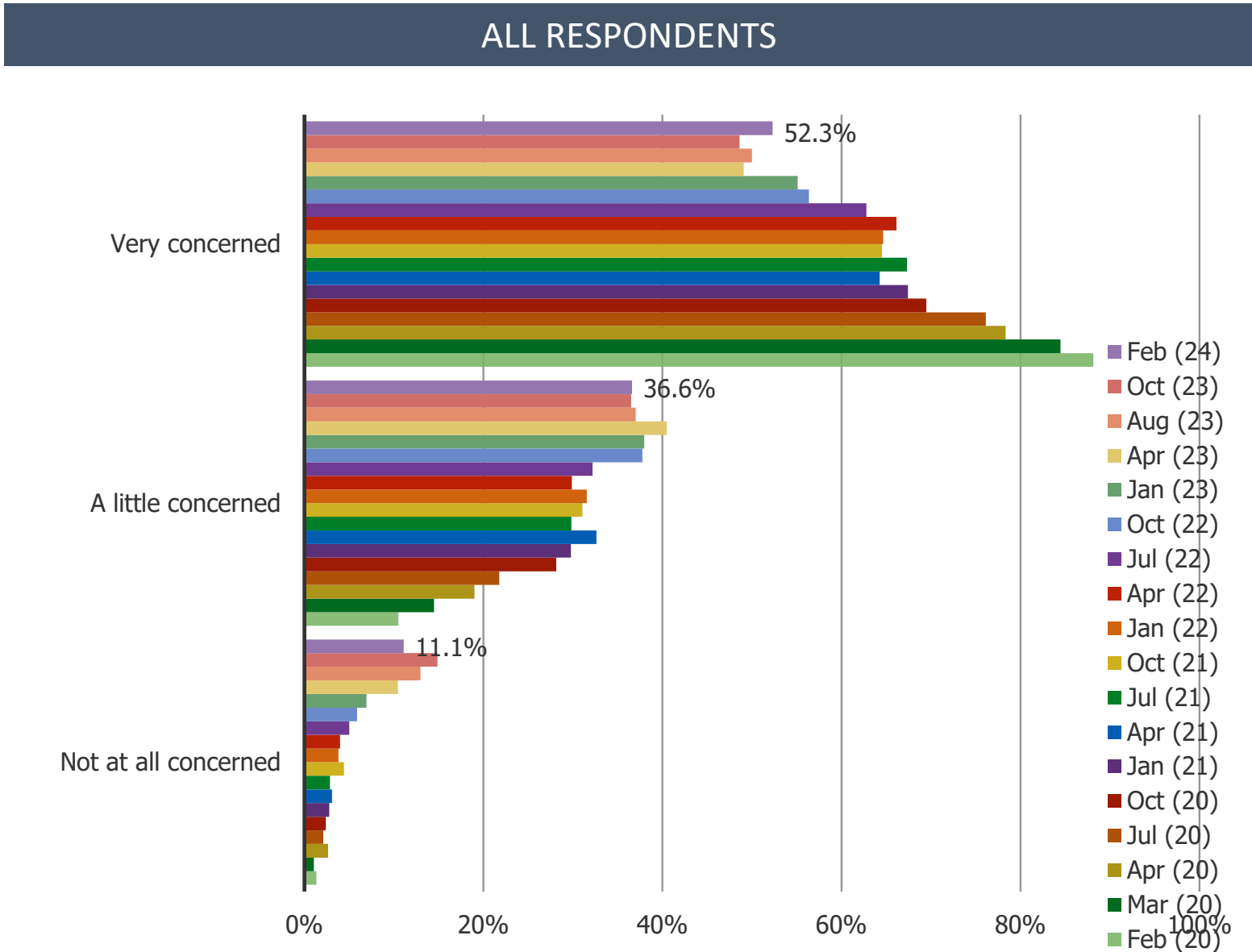
How does COVID impact your daily life?

January 2023

October 2022

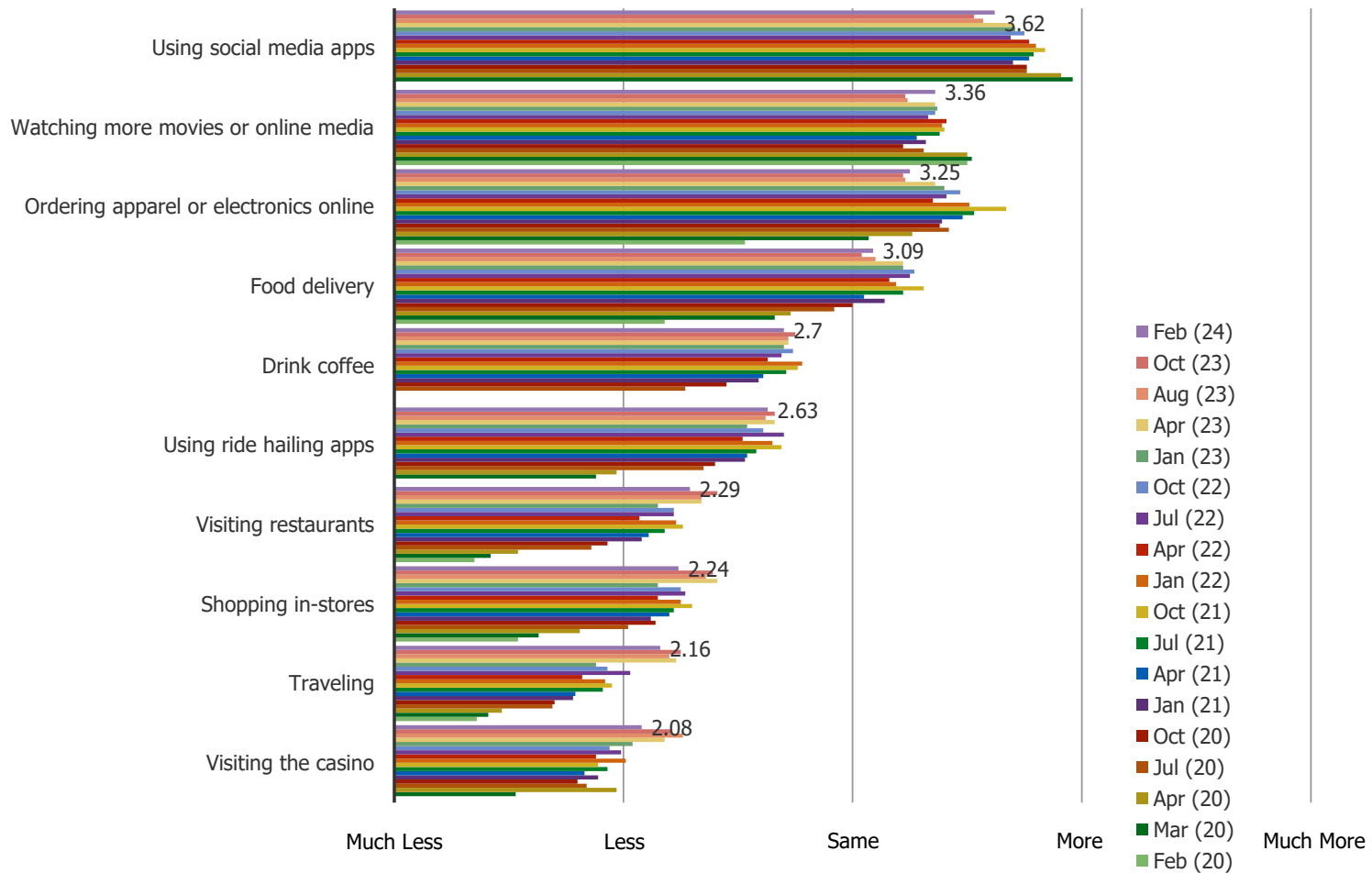


Please rate your level of concern about the Coronavirus?

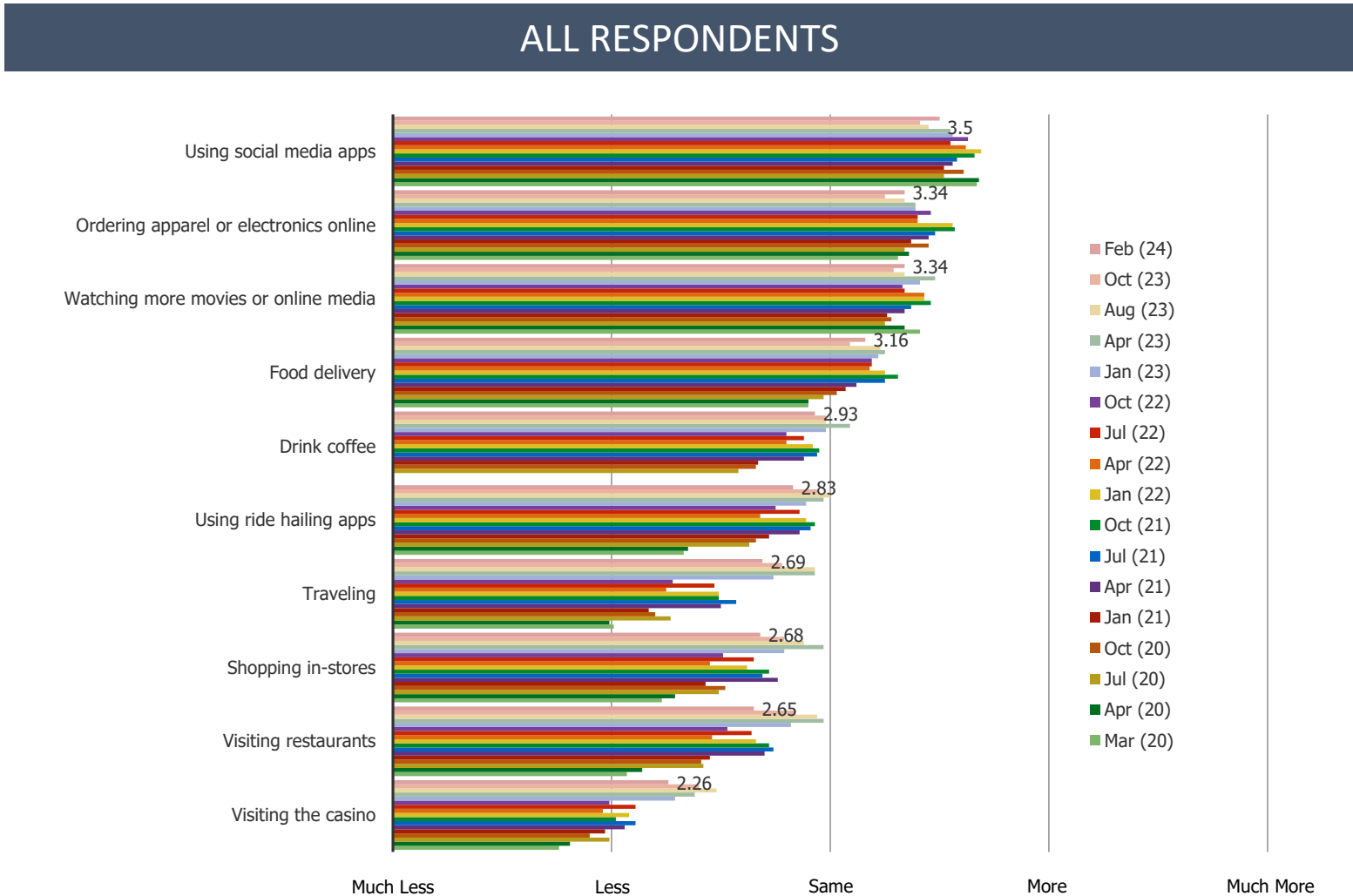


Has the Coronavirus caused you to do any of the following more or less? (Time Series)

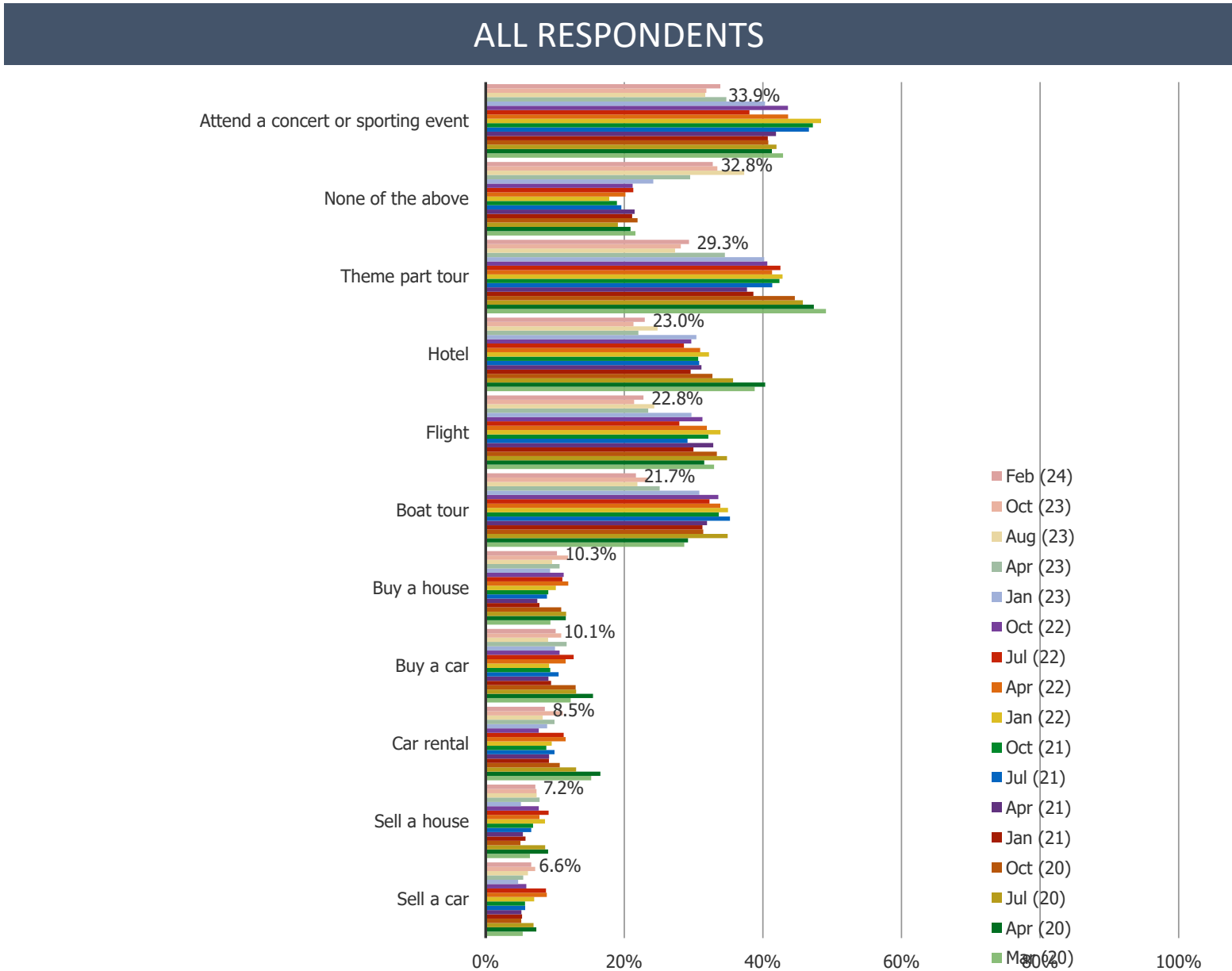
ALL RESPONDENTS



Looking ahead, will the coronavirus cause you to do the following more or less?

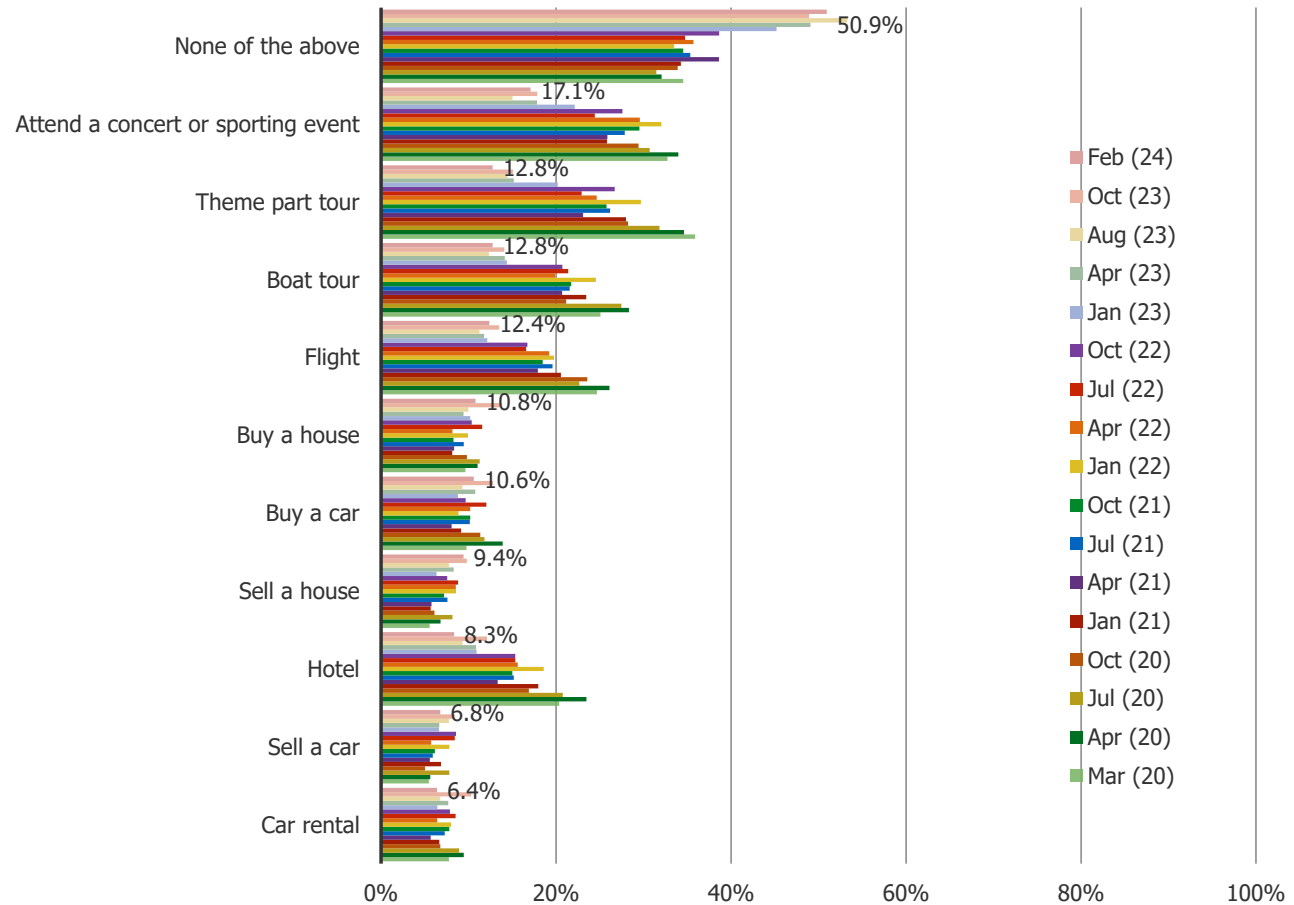


Did you cancel any of the following because of the coronavirus? (Select ALL)

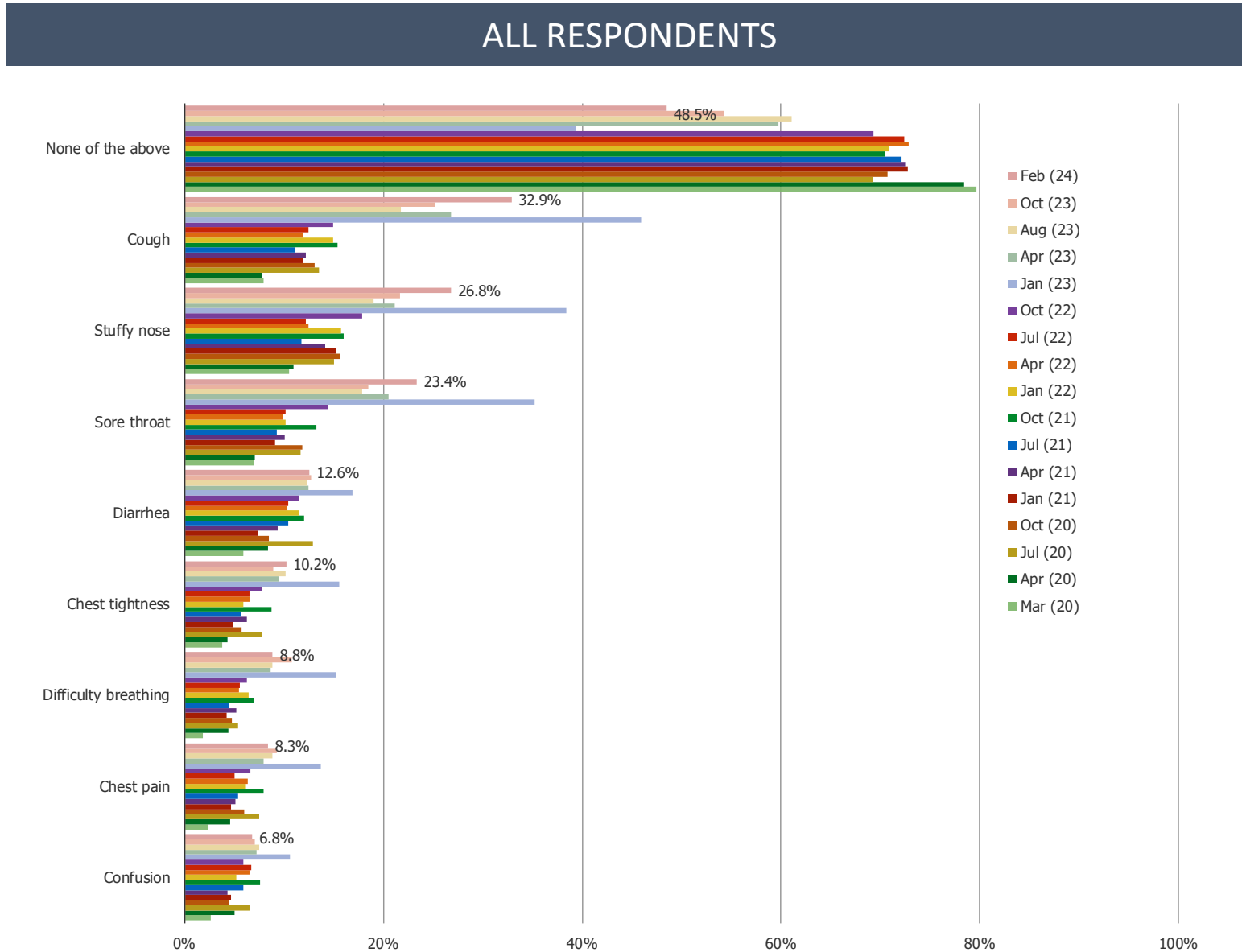


Do you expect to delay or cancel any of the following in the next 3-6 months?

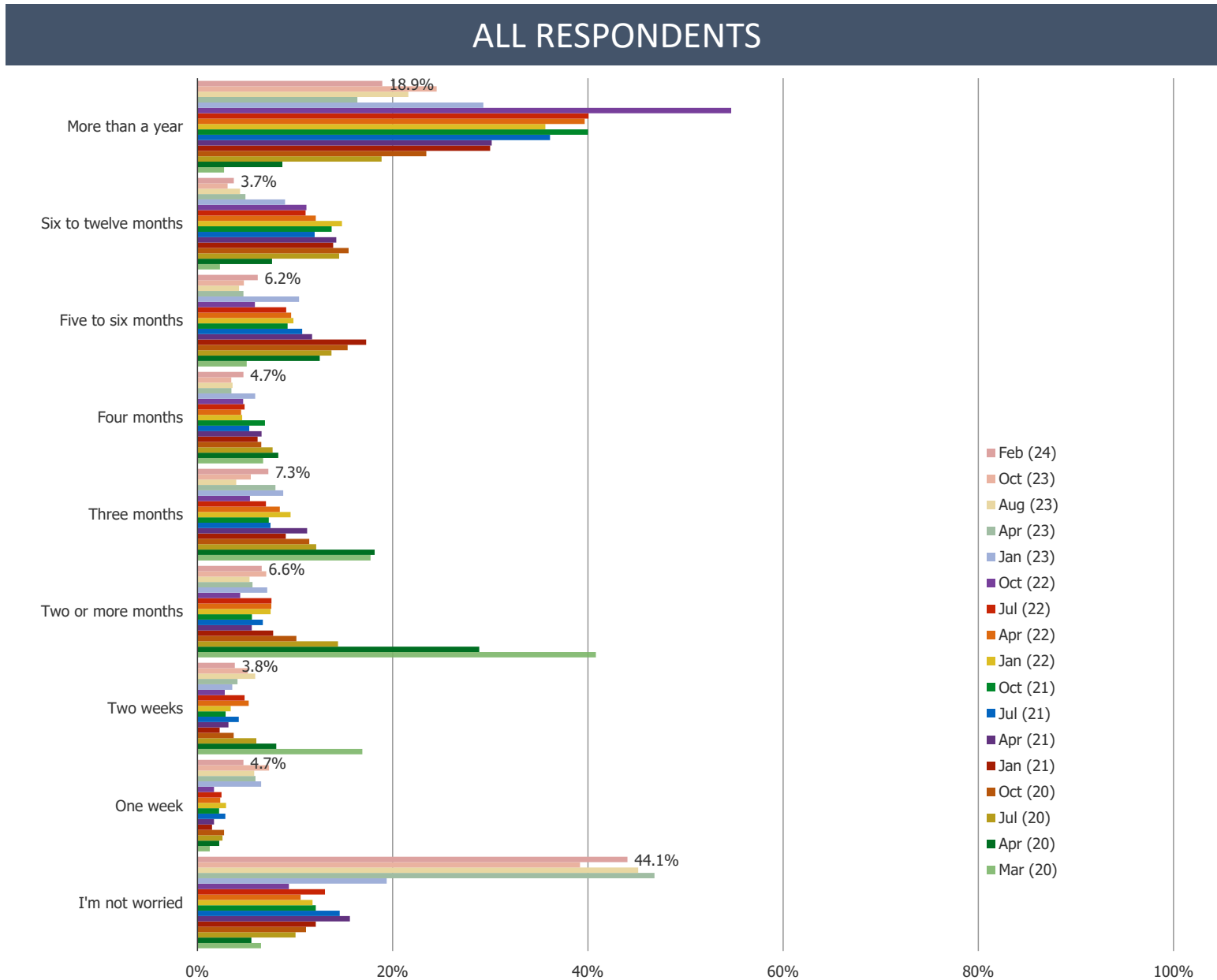
ALL RESPONDENTS



In the past three months, have you had any of the following conditions? (Select ALL)



For how much longer do you expect the coronavirus to be a concern?

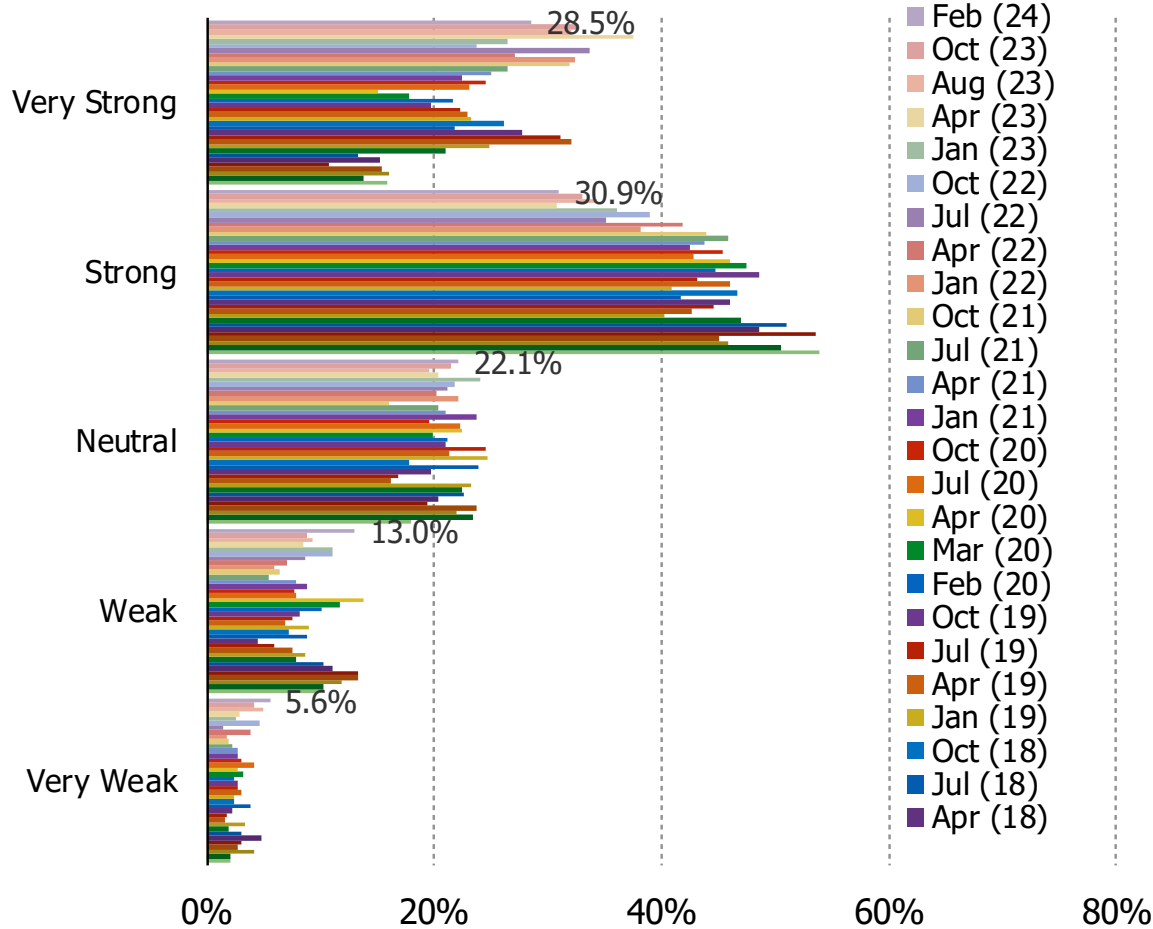


II

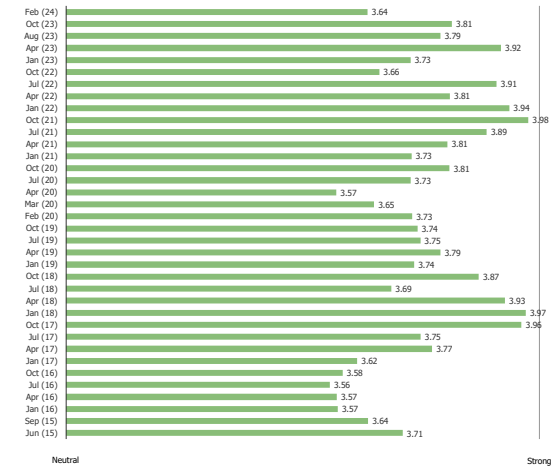
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How confident do you currently feel about spending money?

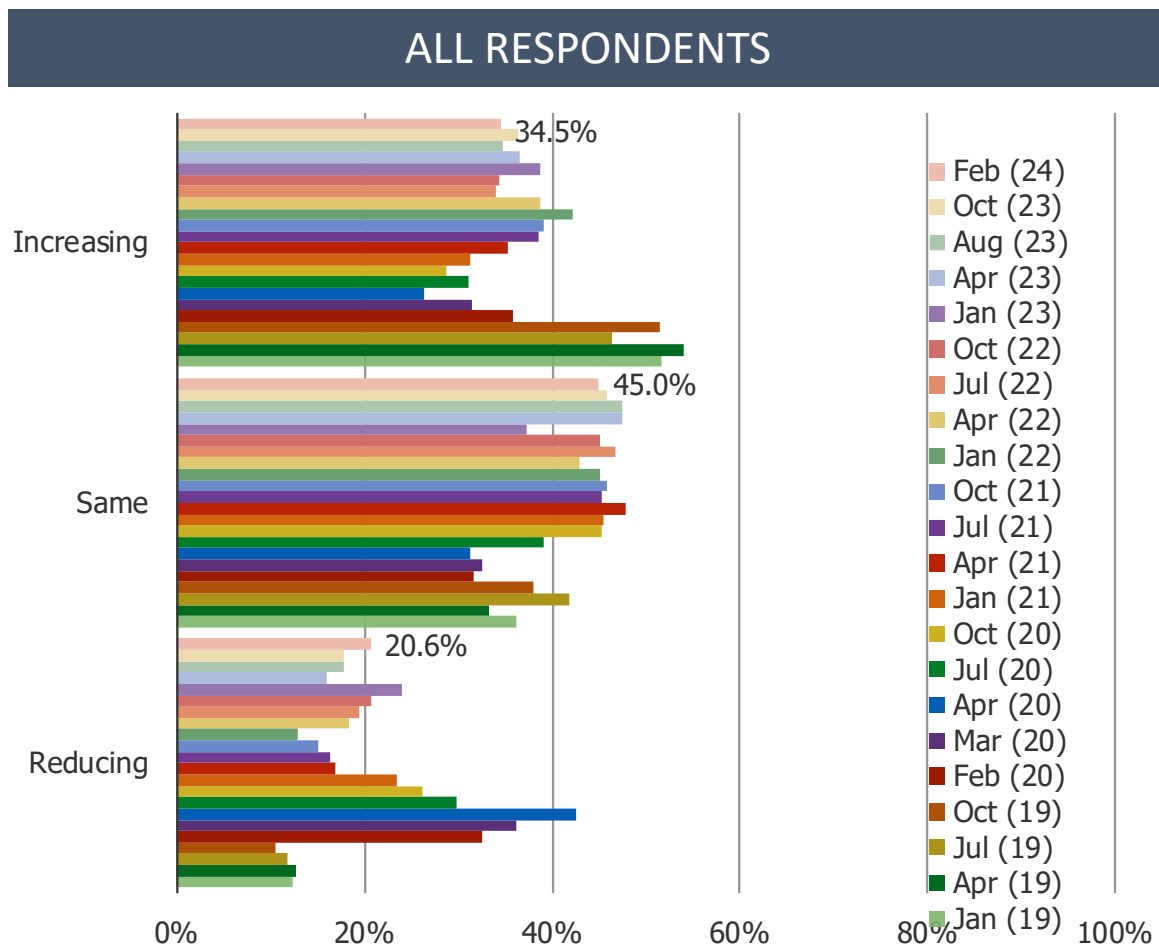
ALL RESPONDENTS



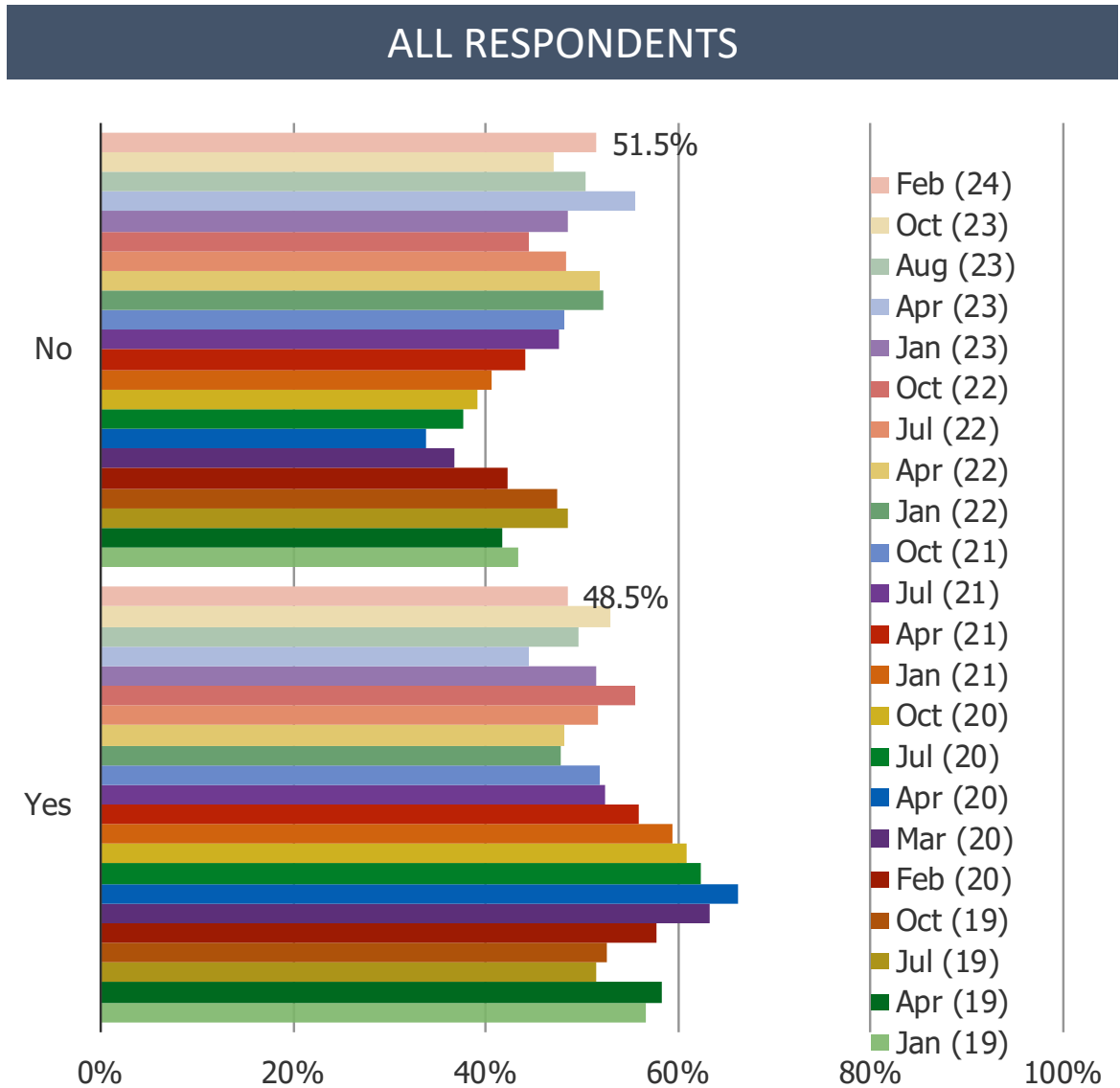
WEIGHTED AVERAGE



How much have you been spending recently?

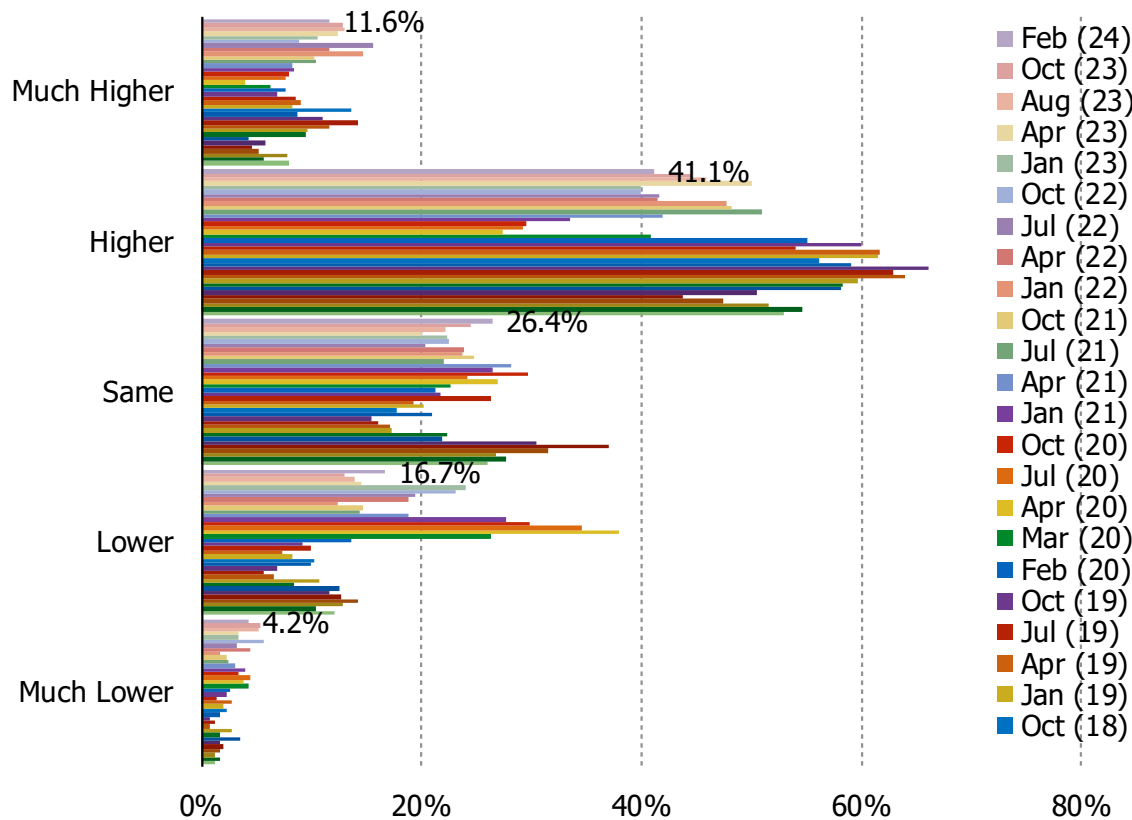


Do you want to reduce spending now?

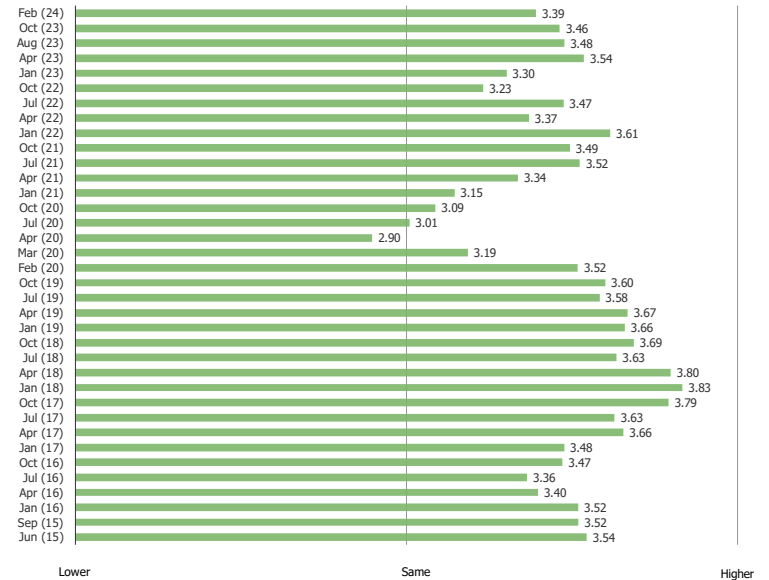


How does your household income compare to last year?

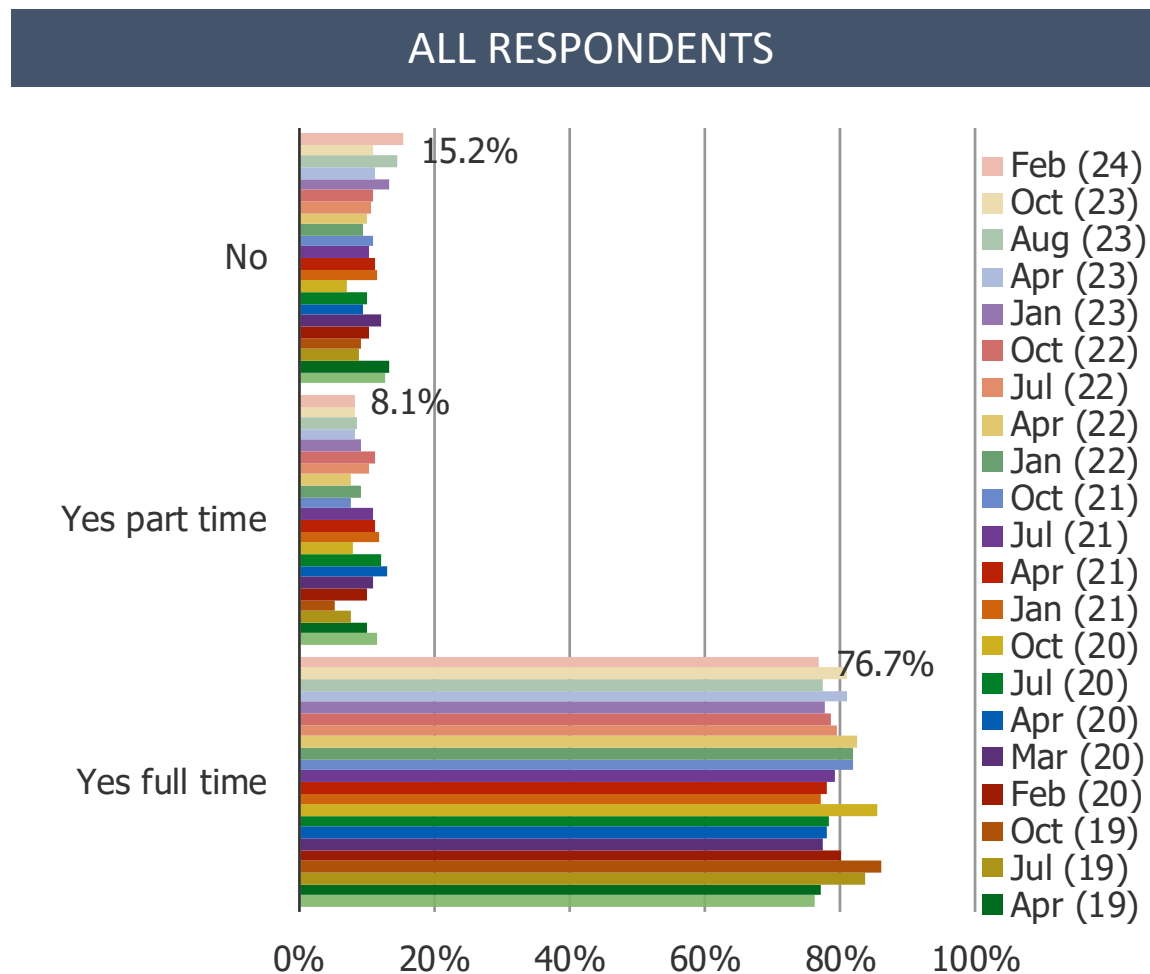
ALL RESPONDENTS



WEIGHTED AVERAGE

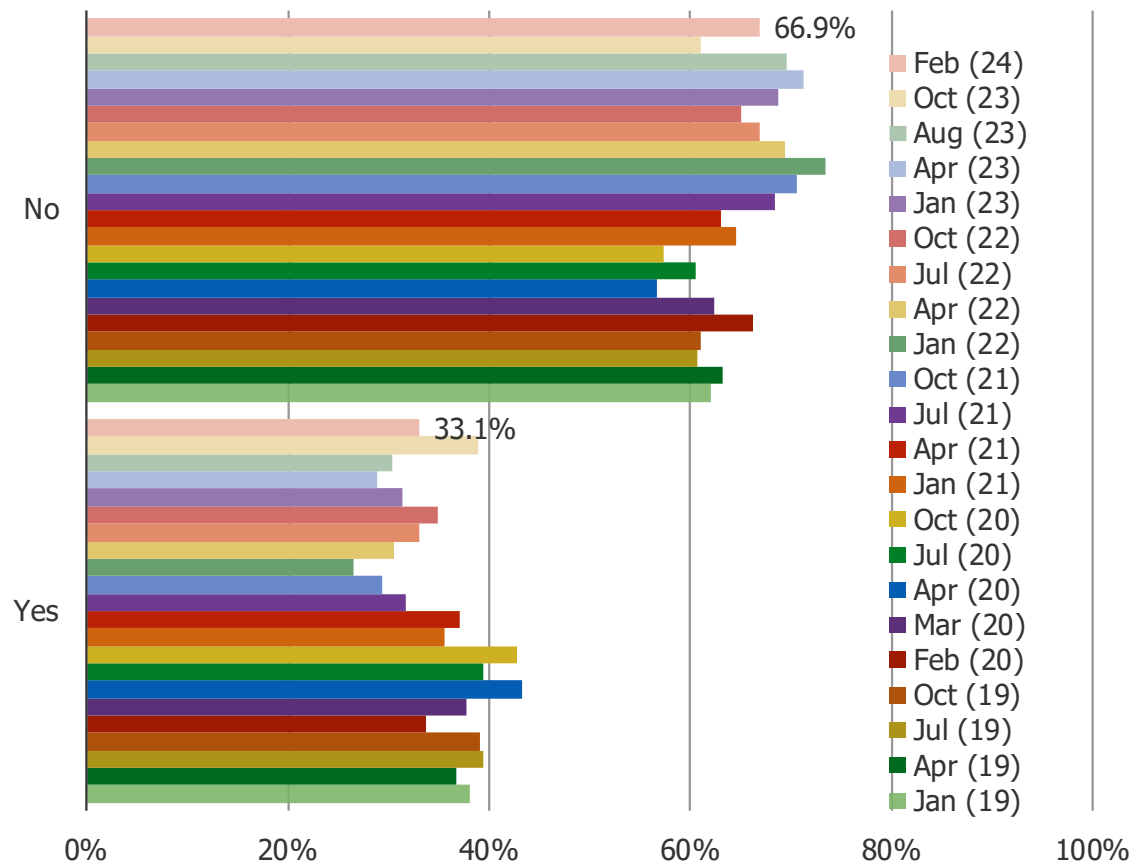


Do you have a job now?

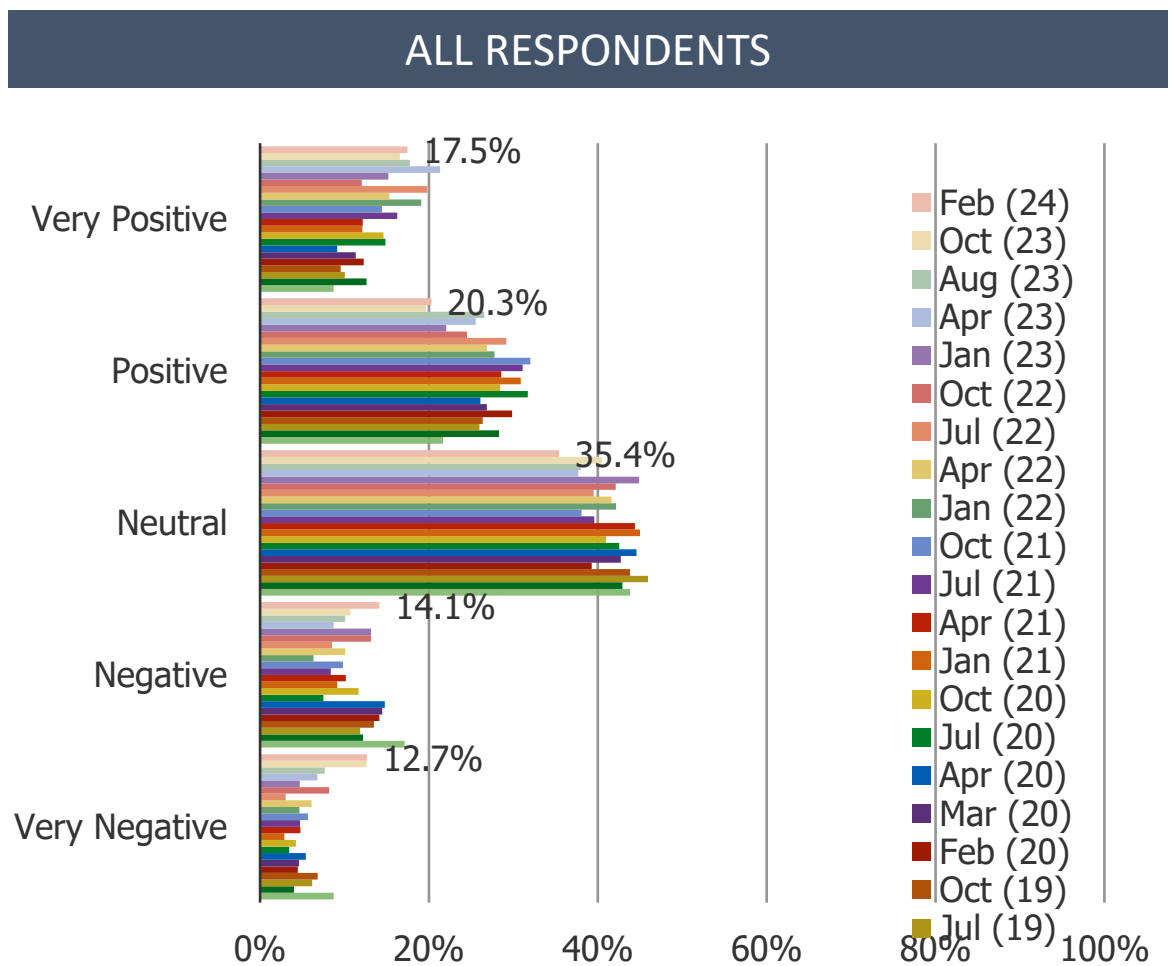


Are you worried that you will lose your job?

POSED TO RESPONDENTS WHO HAVE A JOB



What do you think of the Chinese stock market?

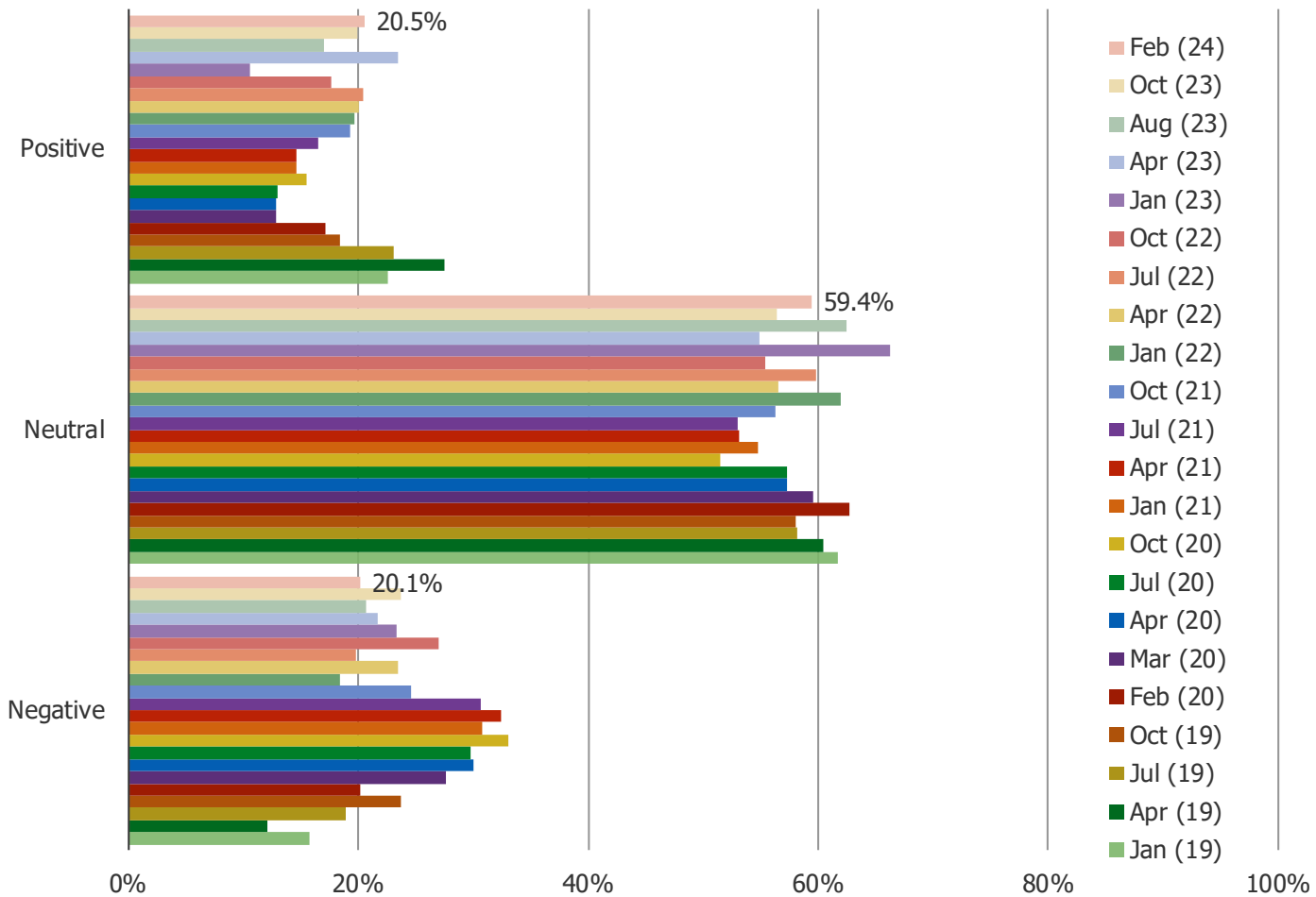


III

- Covid Sentiment
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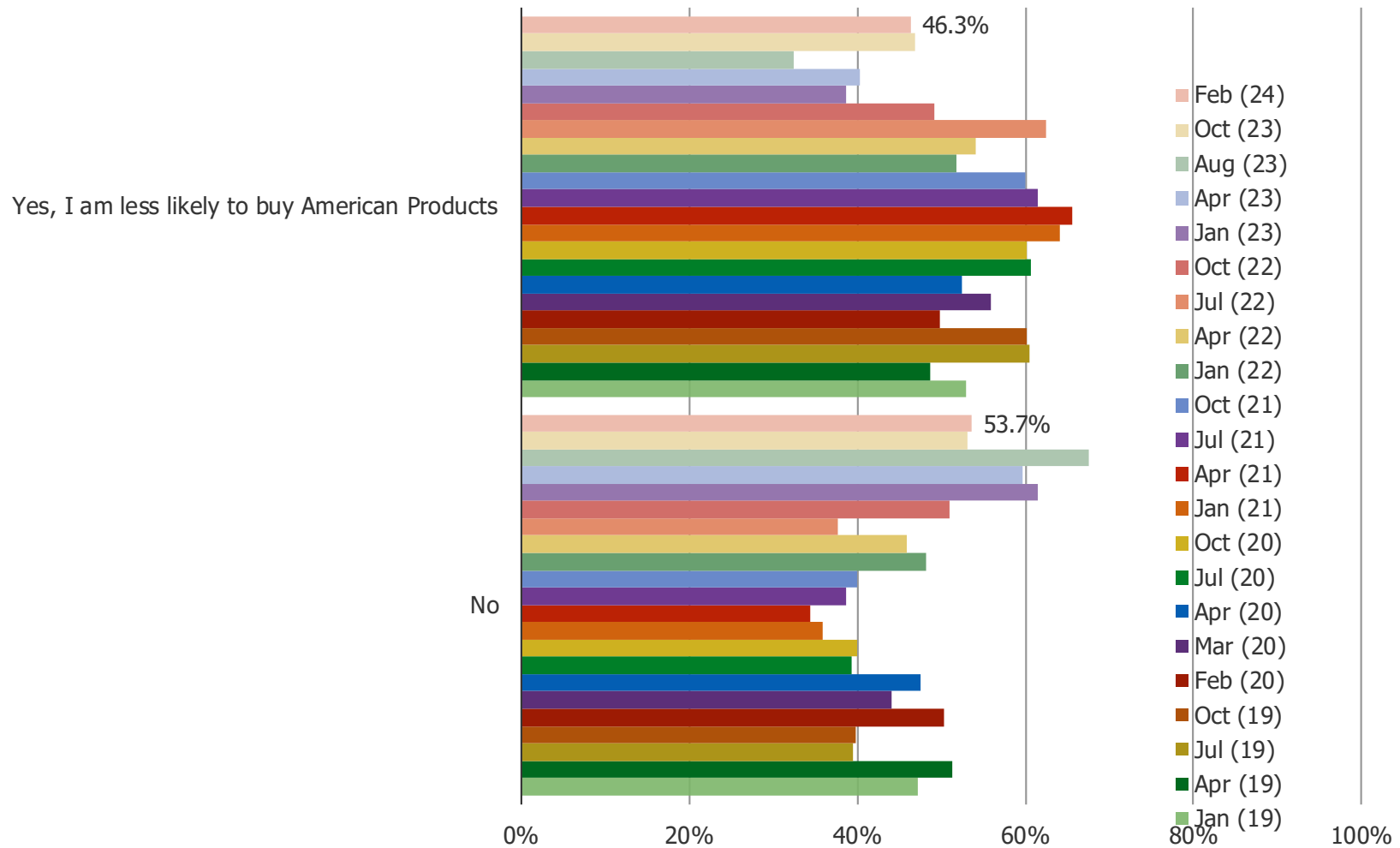
What do you think of the relationship between China and the US?

POSED TO ALL RESPONDENTS



Because of your view on the relationship between China and the United States, are you less likely to buy American products?

POSED TO RESPONDENTS WHO HAVE A NEGATIVE VIEW ON US CHINA RELATIONS

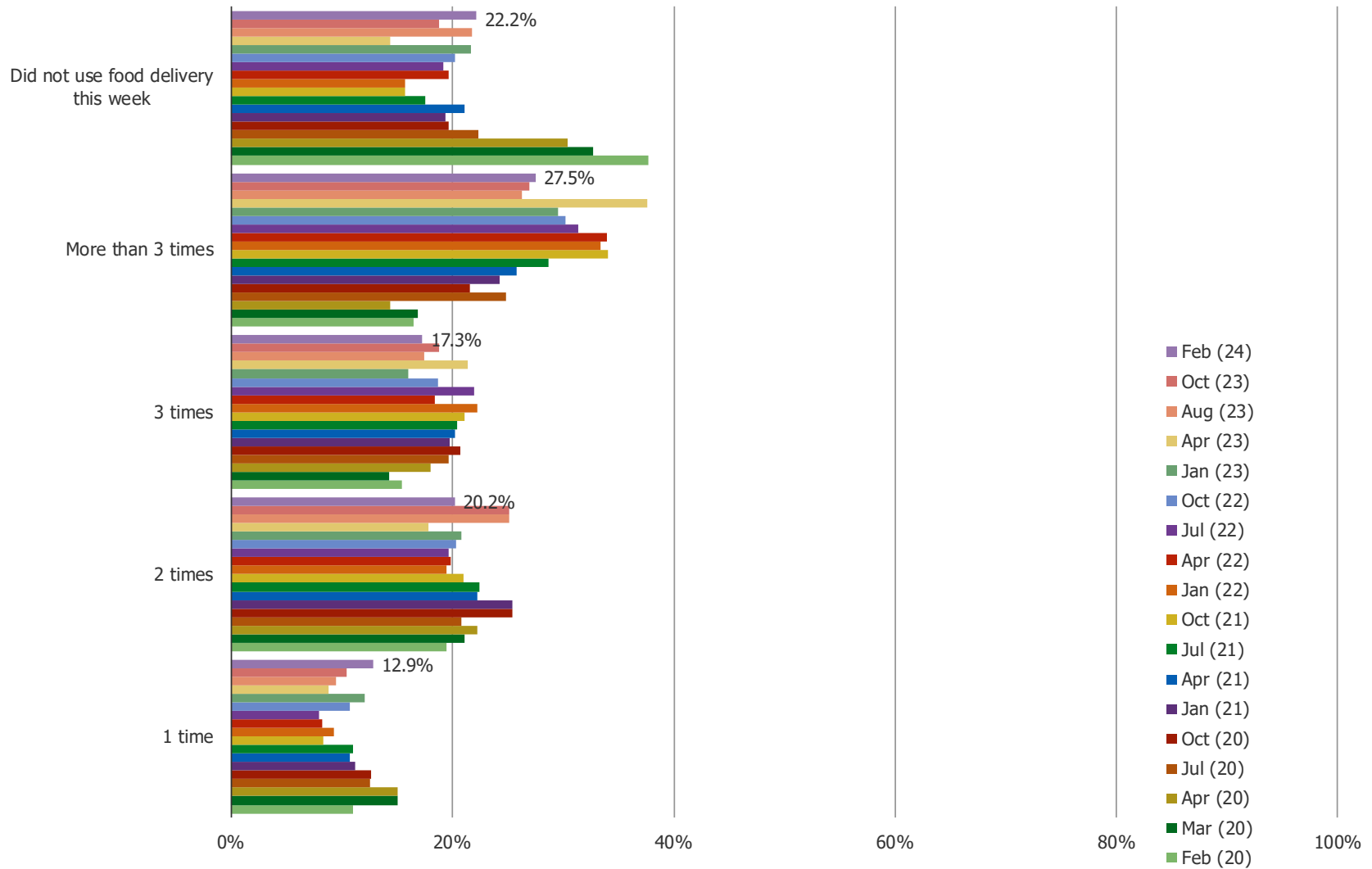


IV

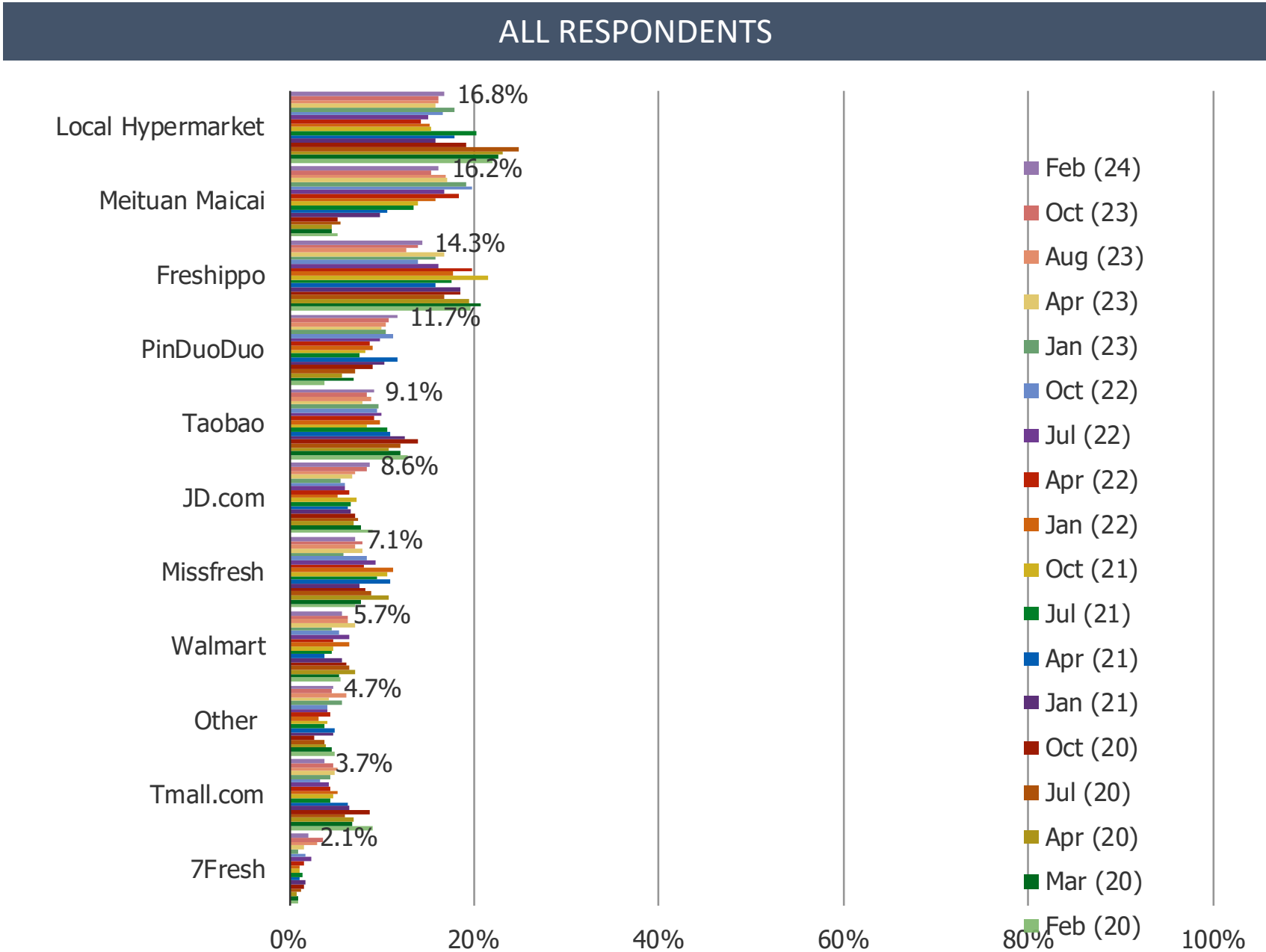
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How often did you order food delivery this week?

ALL RESPONDENTS

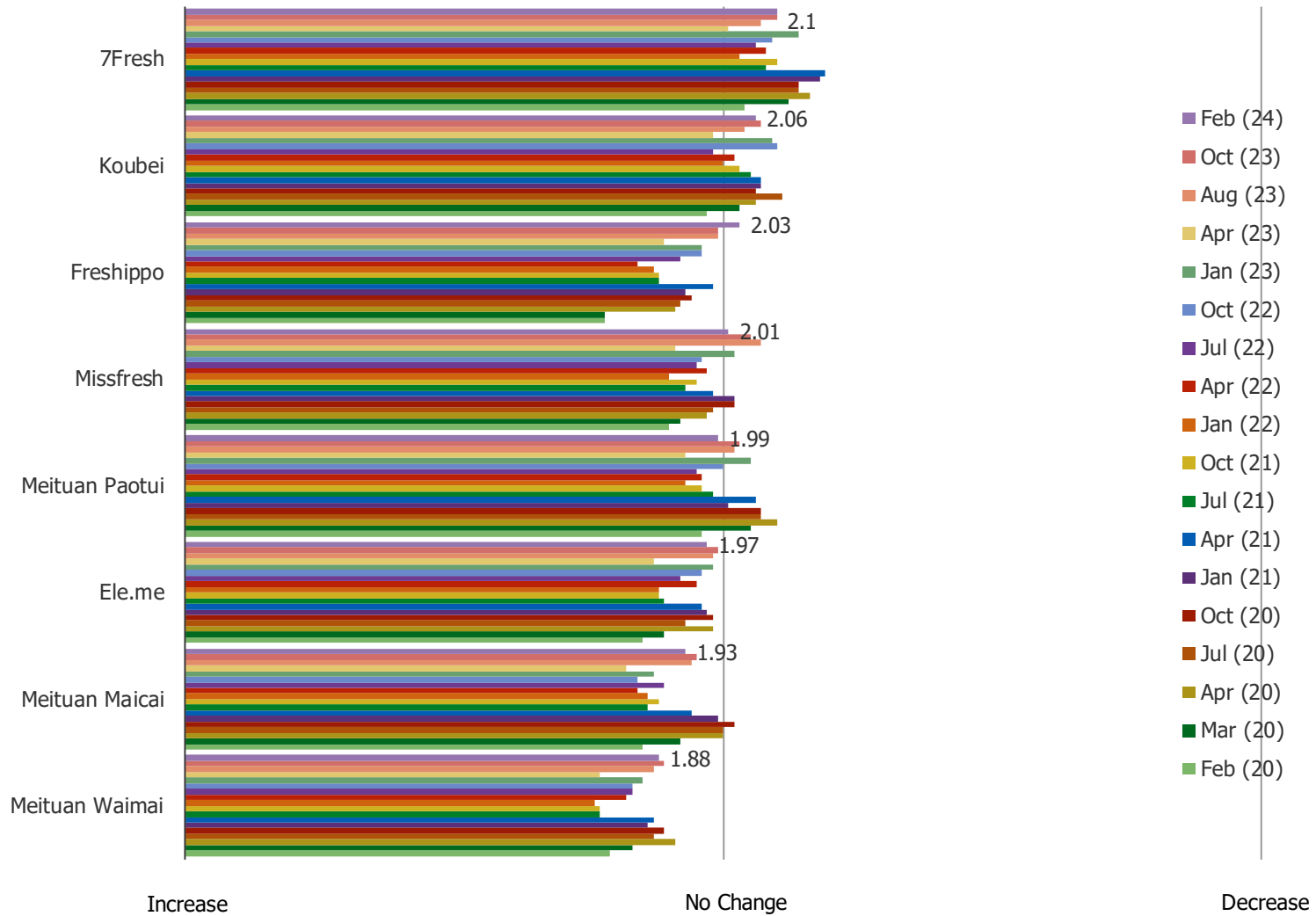


Which app do you use most often for food delivery?



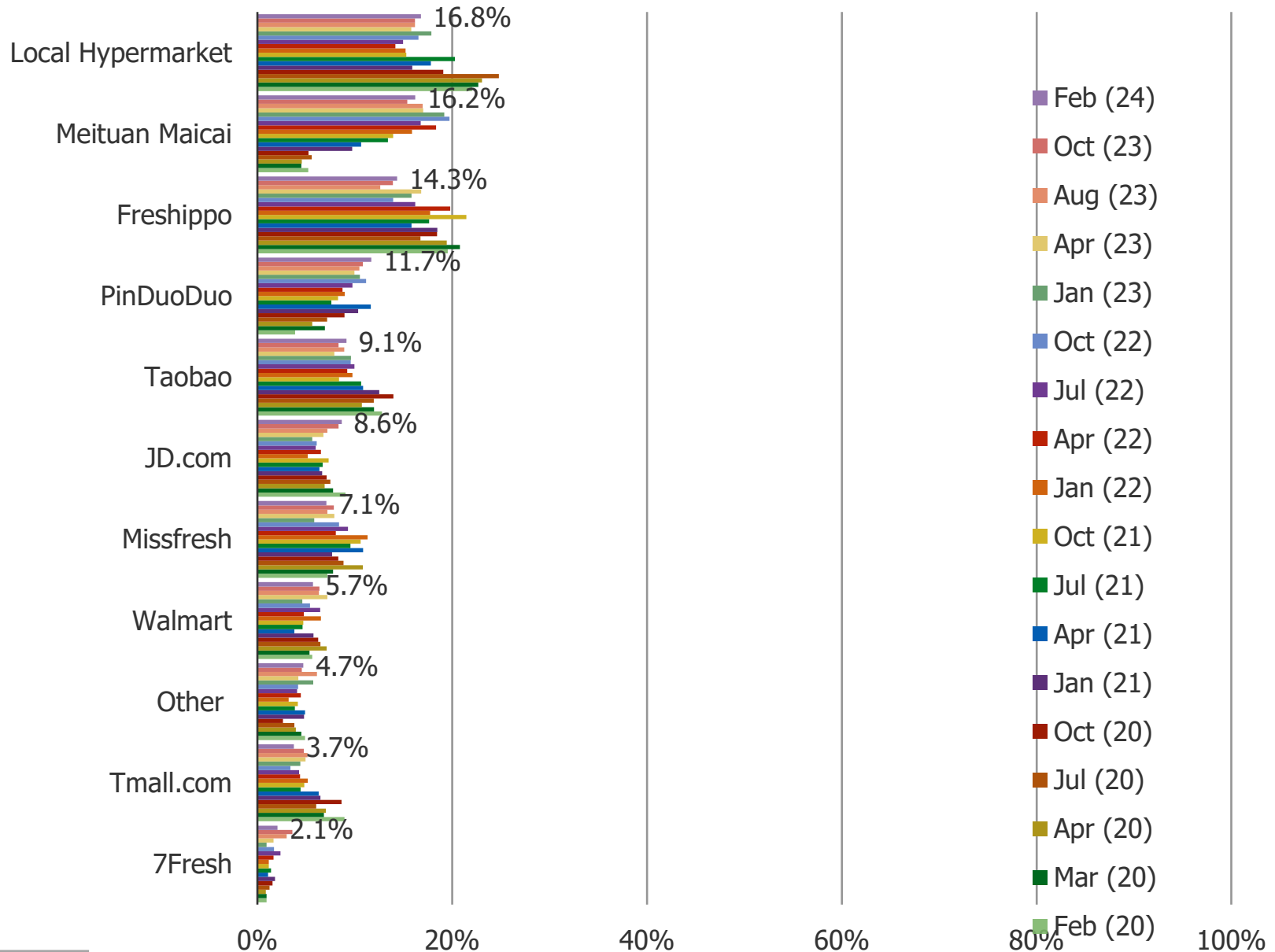
Do you plan to increase or decrease your spending on the following stores and apps?

ALL RESPONDENTS



Where do you buy your groceries and fresh food most often?

ALL RESPONDENTS



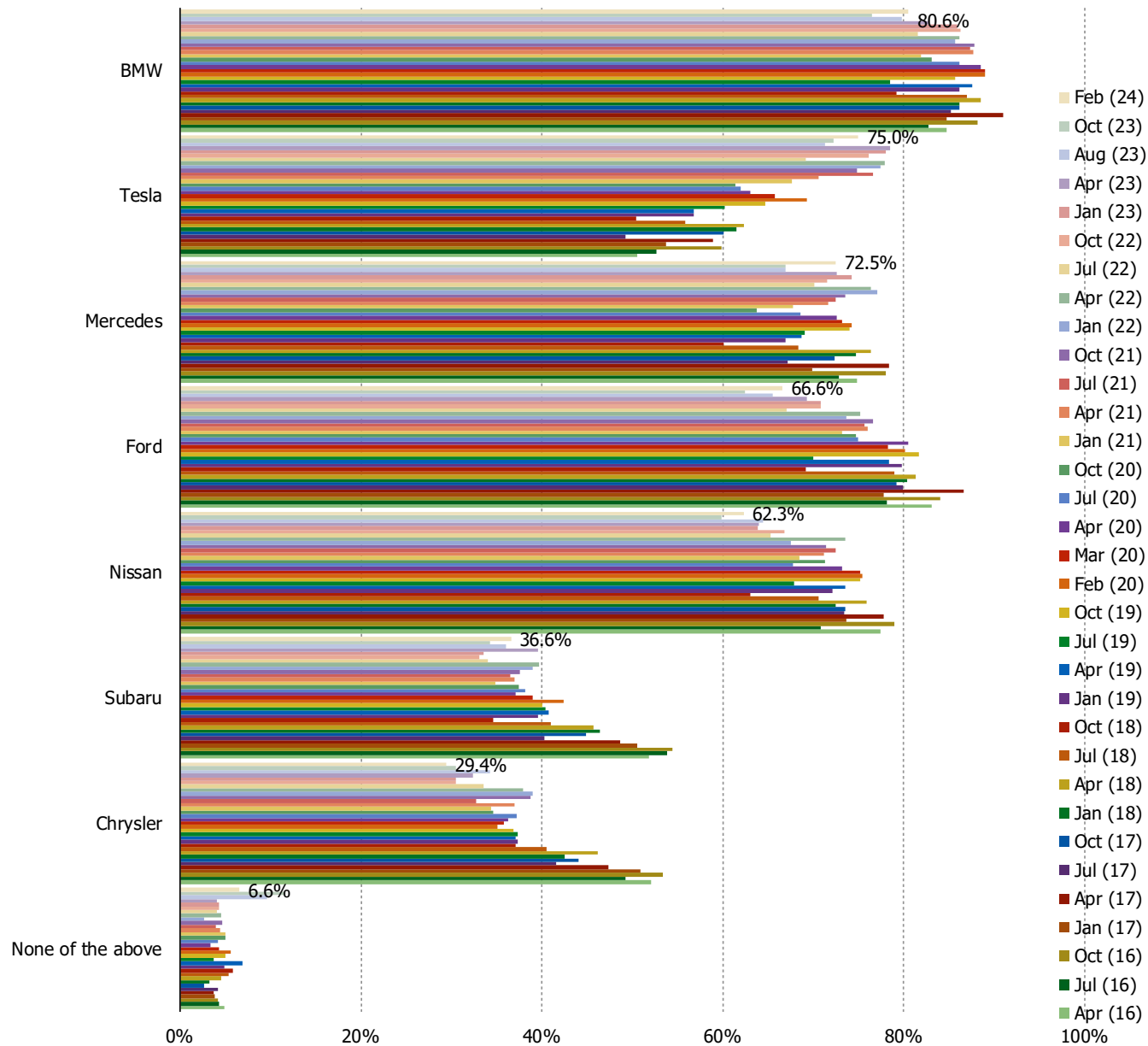
Source: Bespoke Market Intelligence Analysis

V

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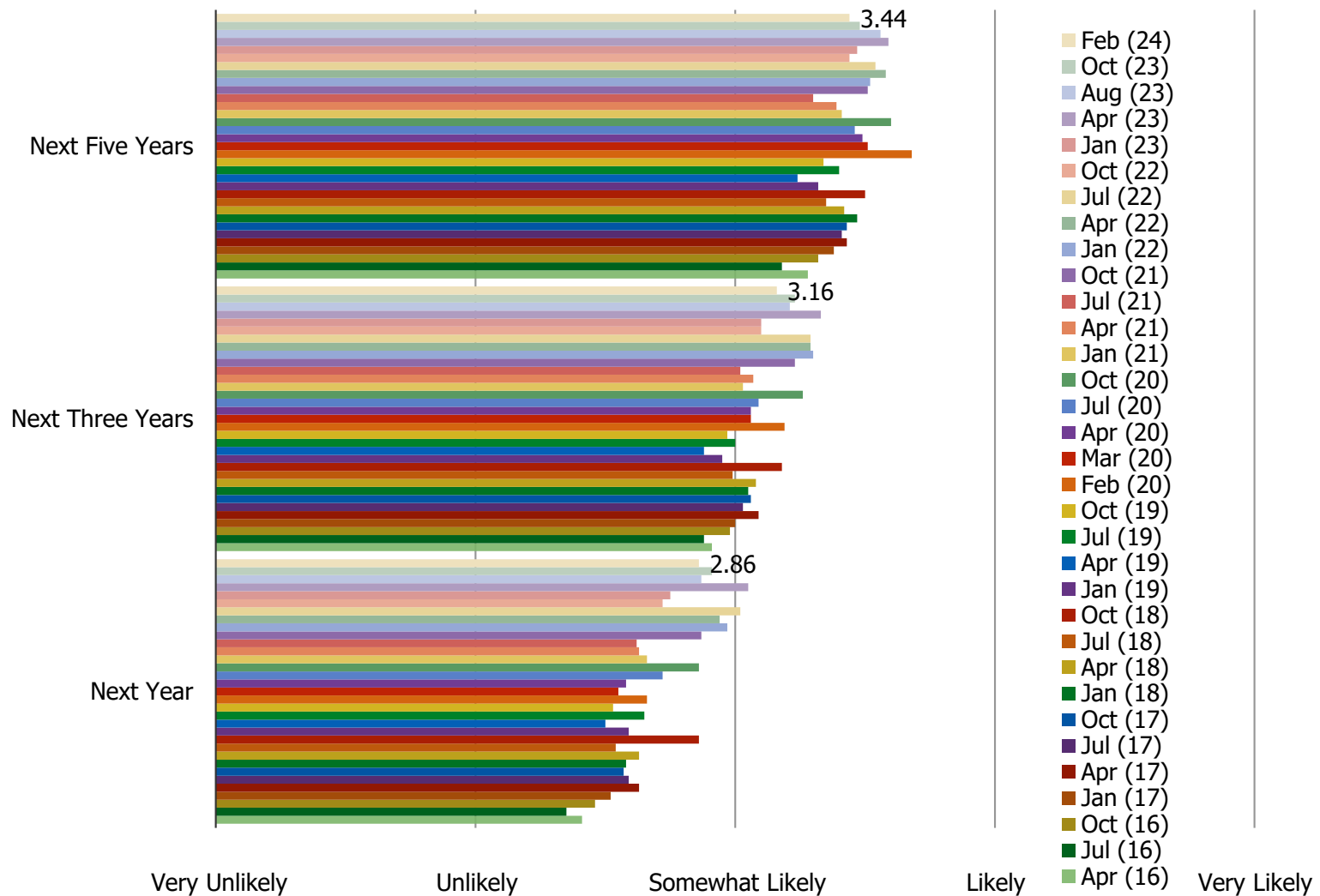
Which of the following have you heard of? Select ALL that apply

ALL RESPONDENTS



How likely are you to purchase or lease a Tesla...

ALL RESPONDENTS

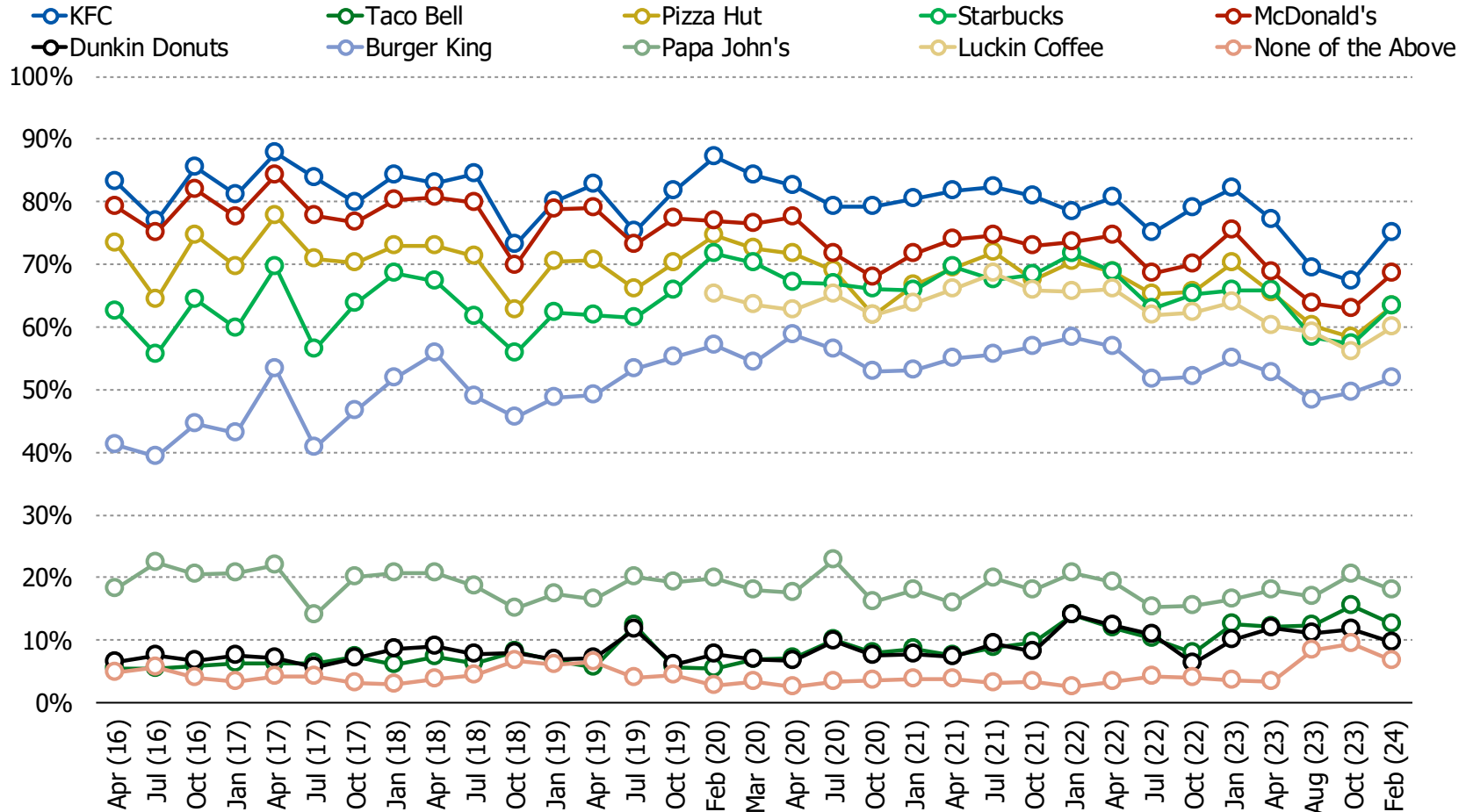


VI

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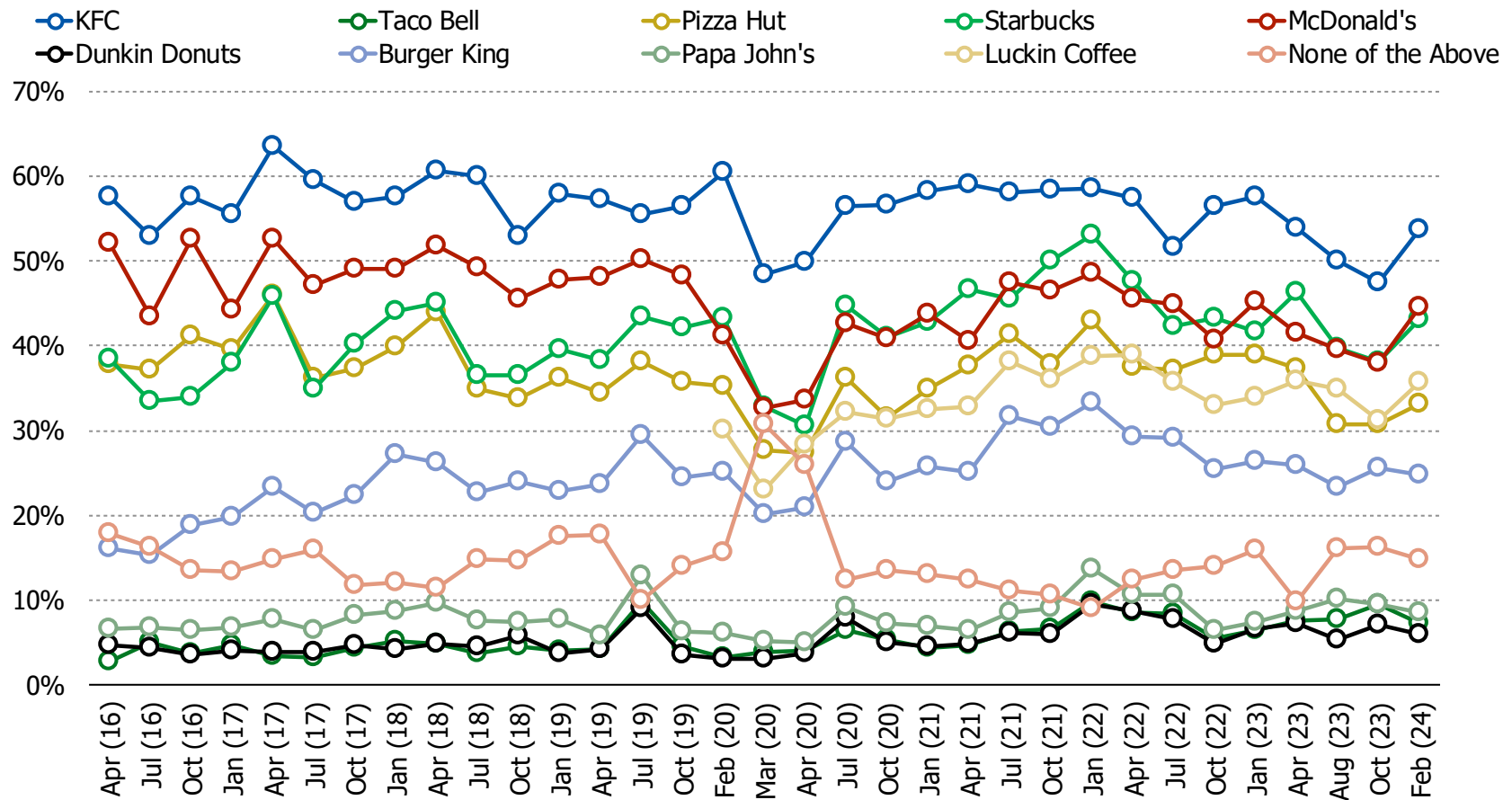
Which of the following have you tried? (Select all that apply)

ALL RESPONDENTS



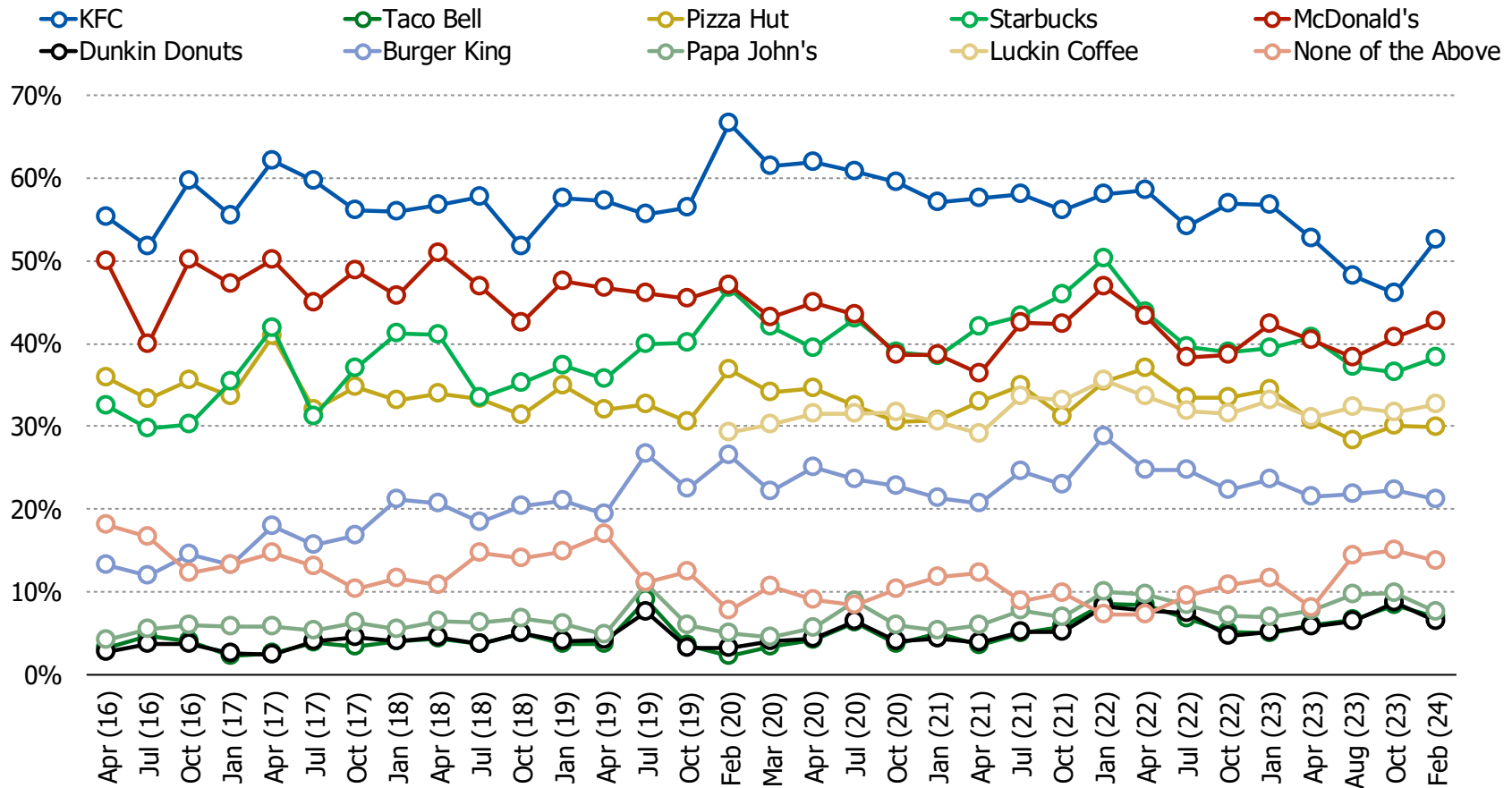
Which of the following have you visited in the past month? (Select all that apply)

ALL RESPONDENTS

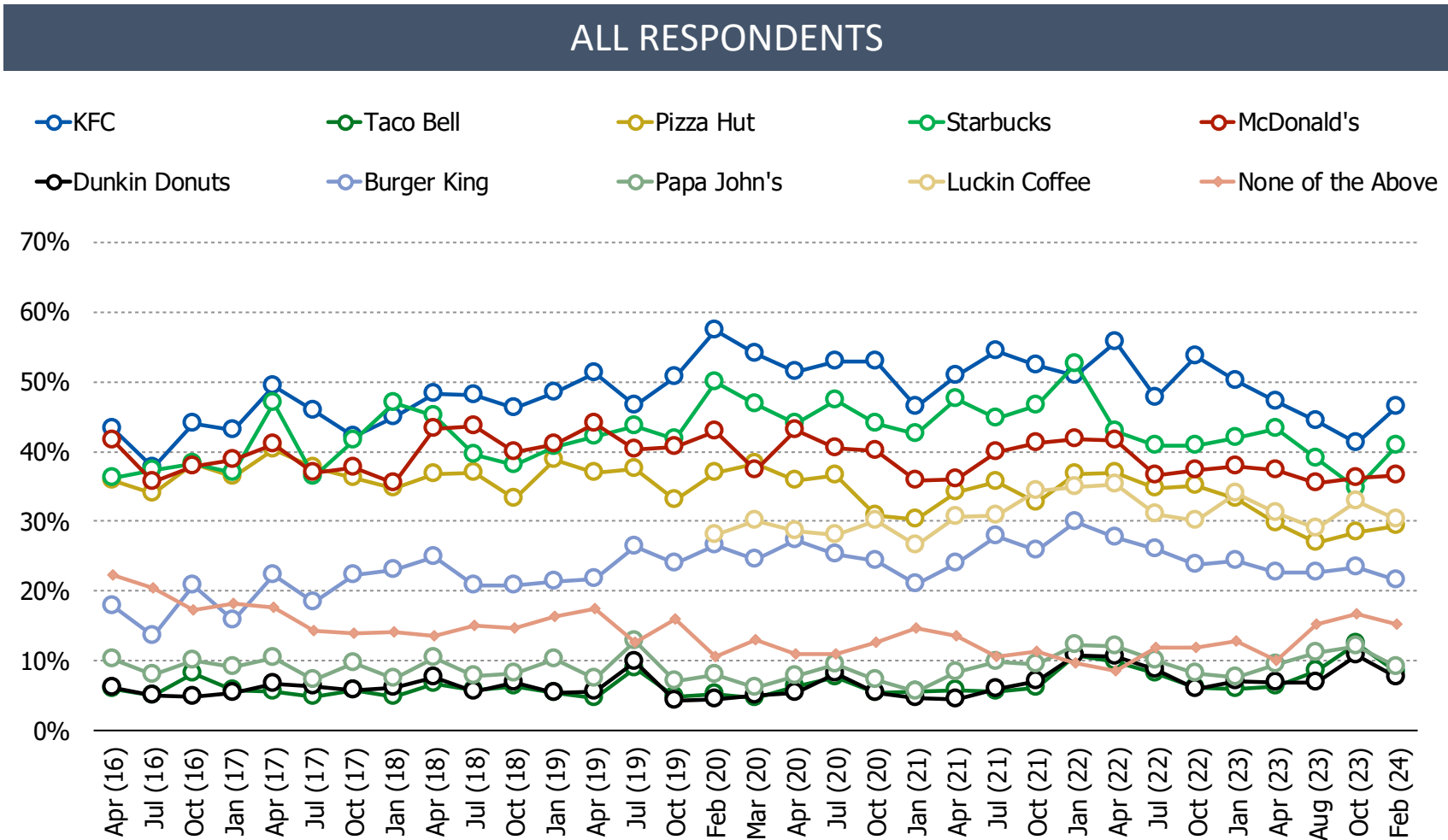


Which of the following do you eat regularly? (Select all that apply)

ALL RESPONDENTS

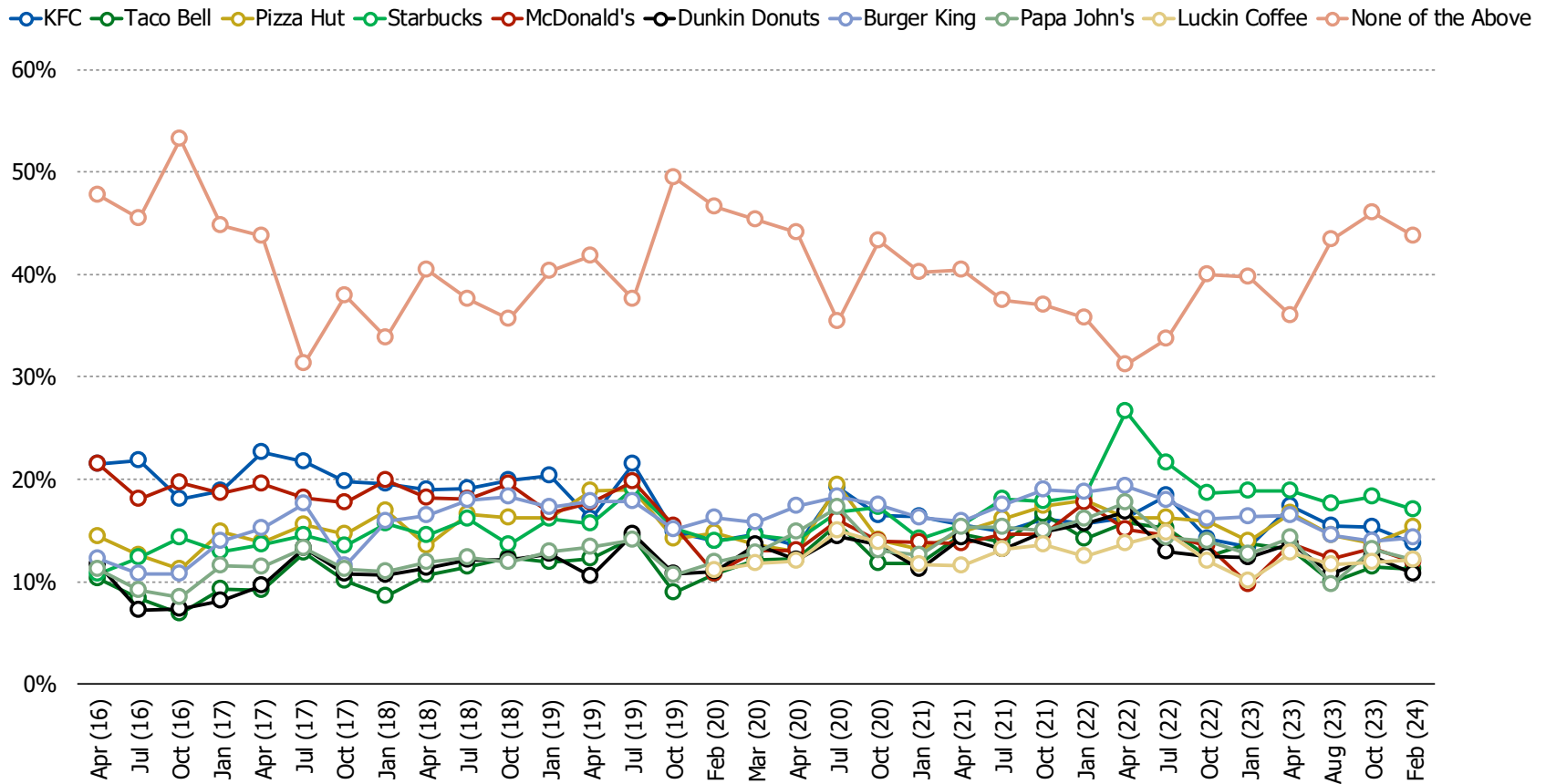


Which of the following do you plan to go more to? (Select all that apply)

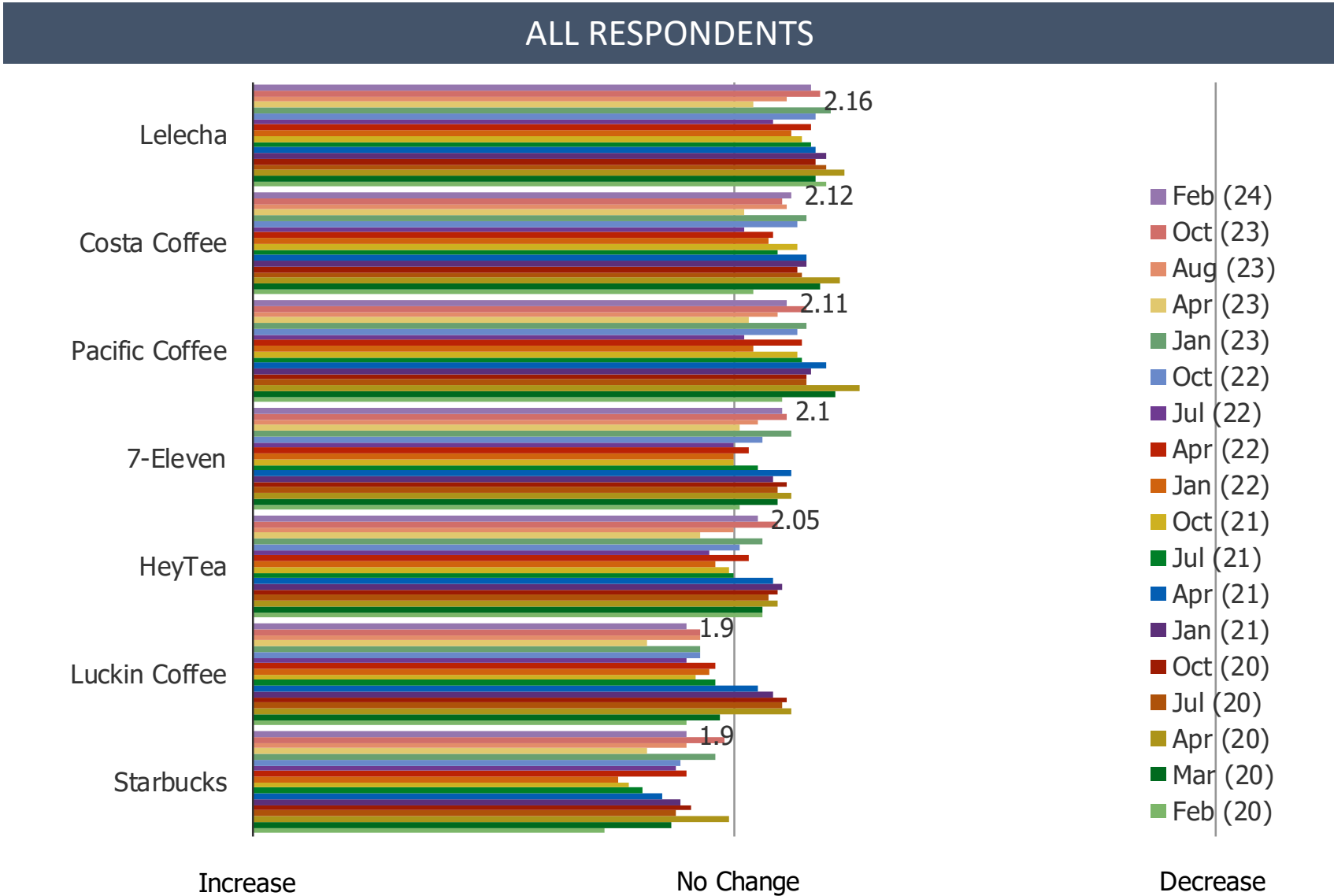


Which of the following do you plan to go less to? (Select all that apply)

ALL RESPONDENTS



Do you plan to increase or decrease spending on coffee and tea at...

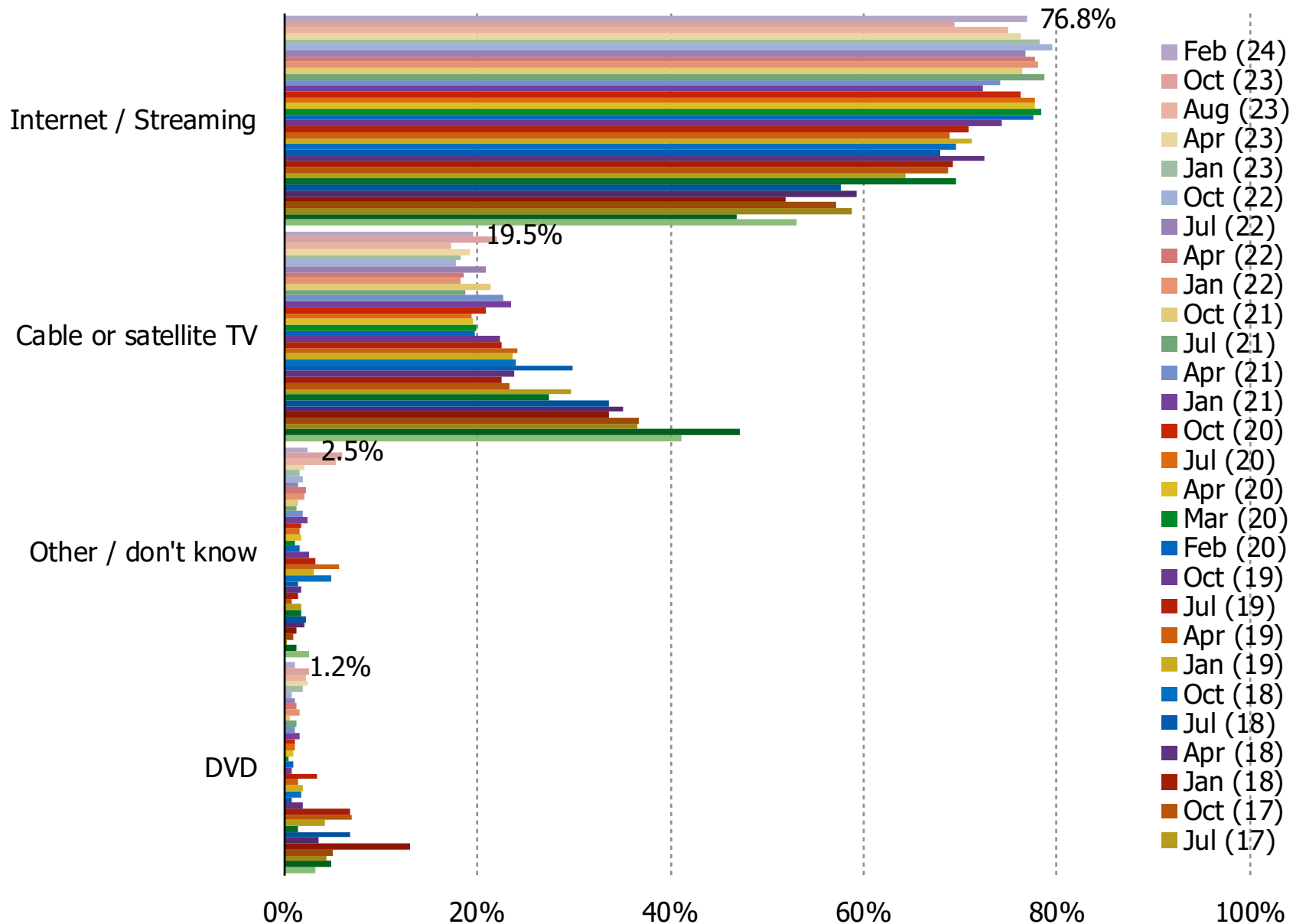


VII

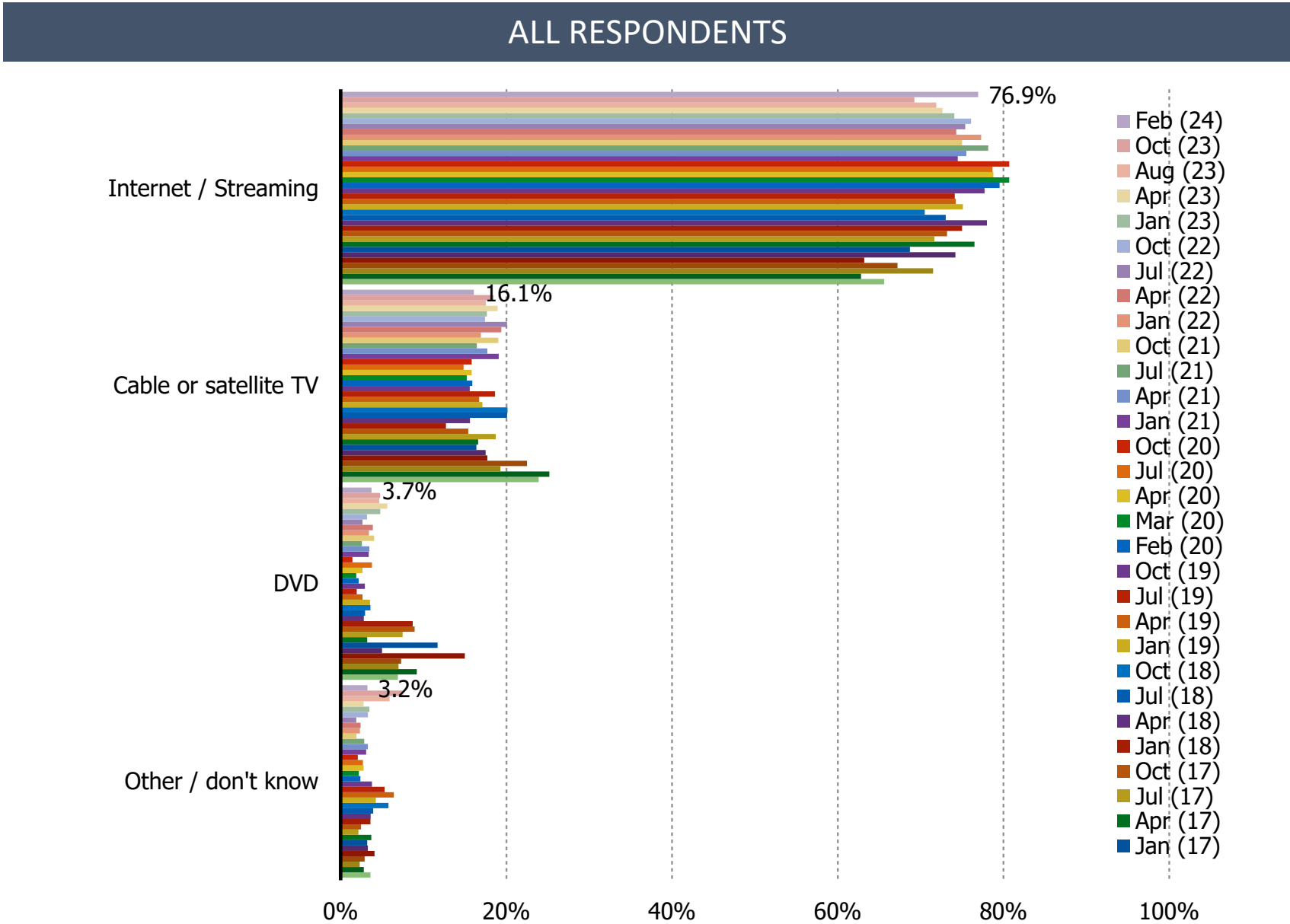
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What is your preference for watching TV shows?

ALL RESPONDENTS



What is your preference for watching movies?

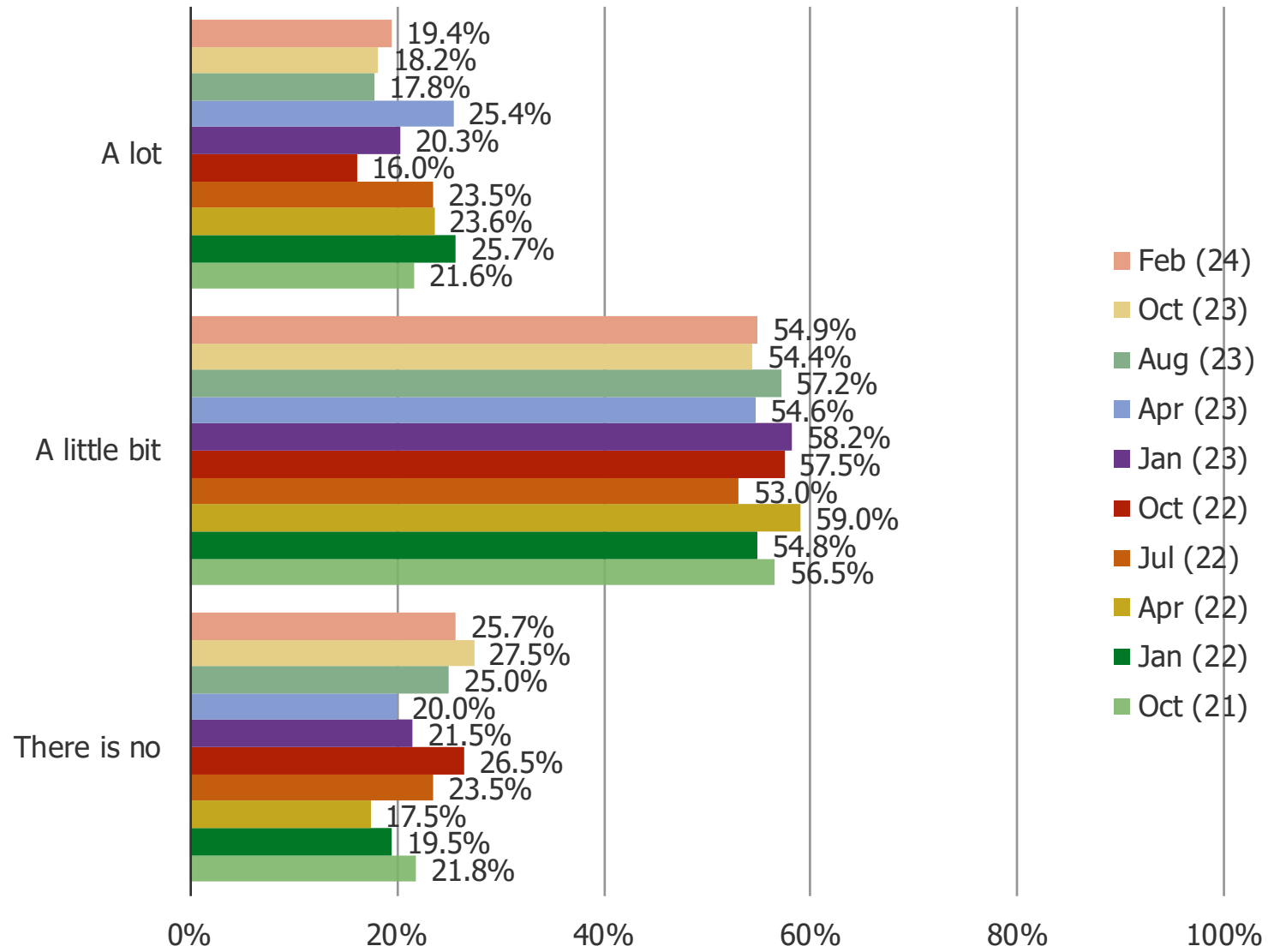


VIII

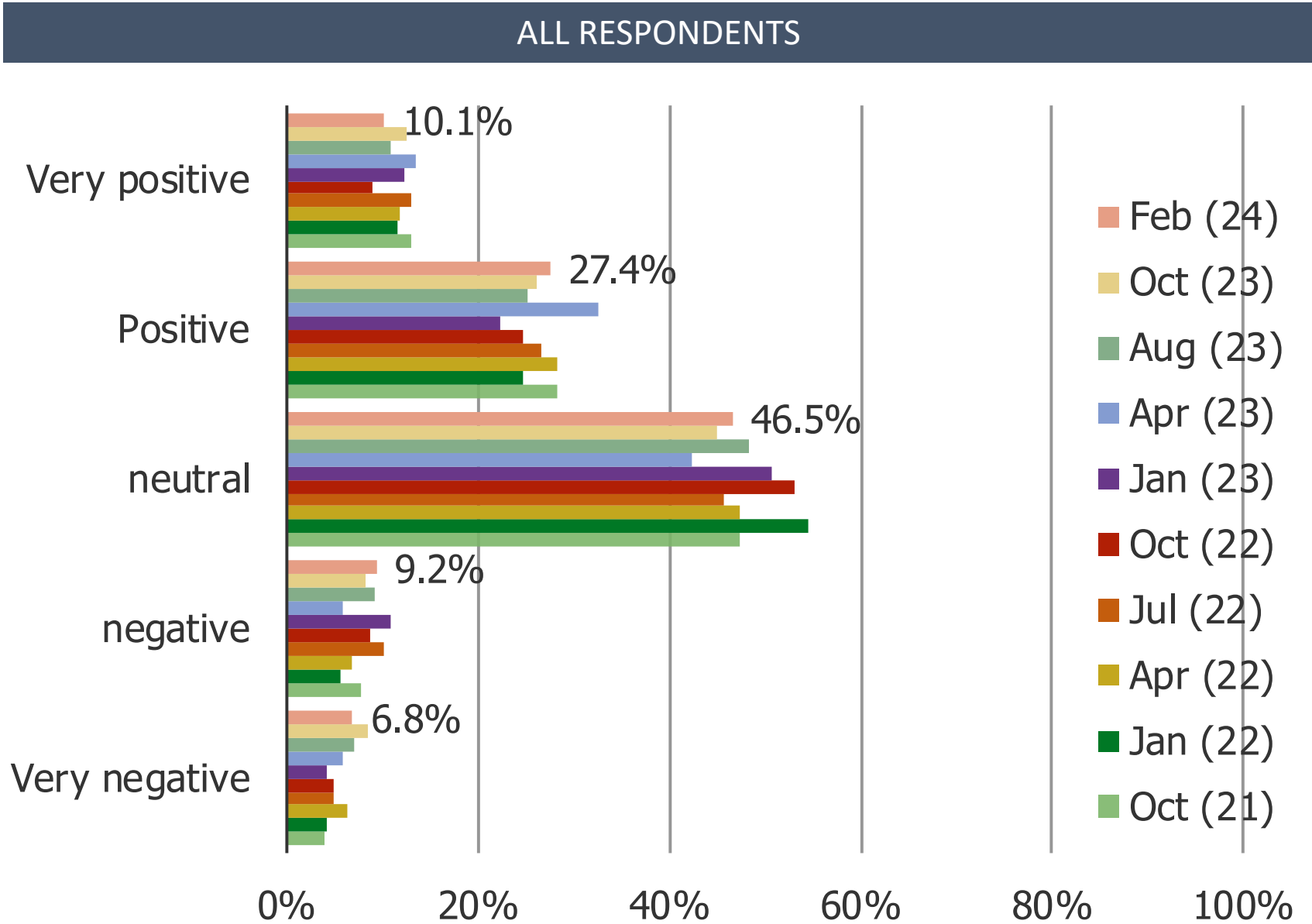
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Do you own luxury goods?

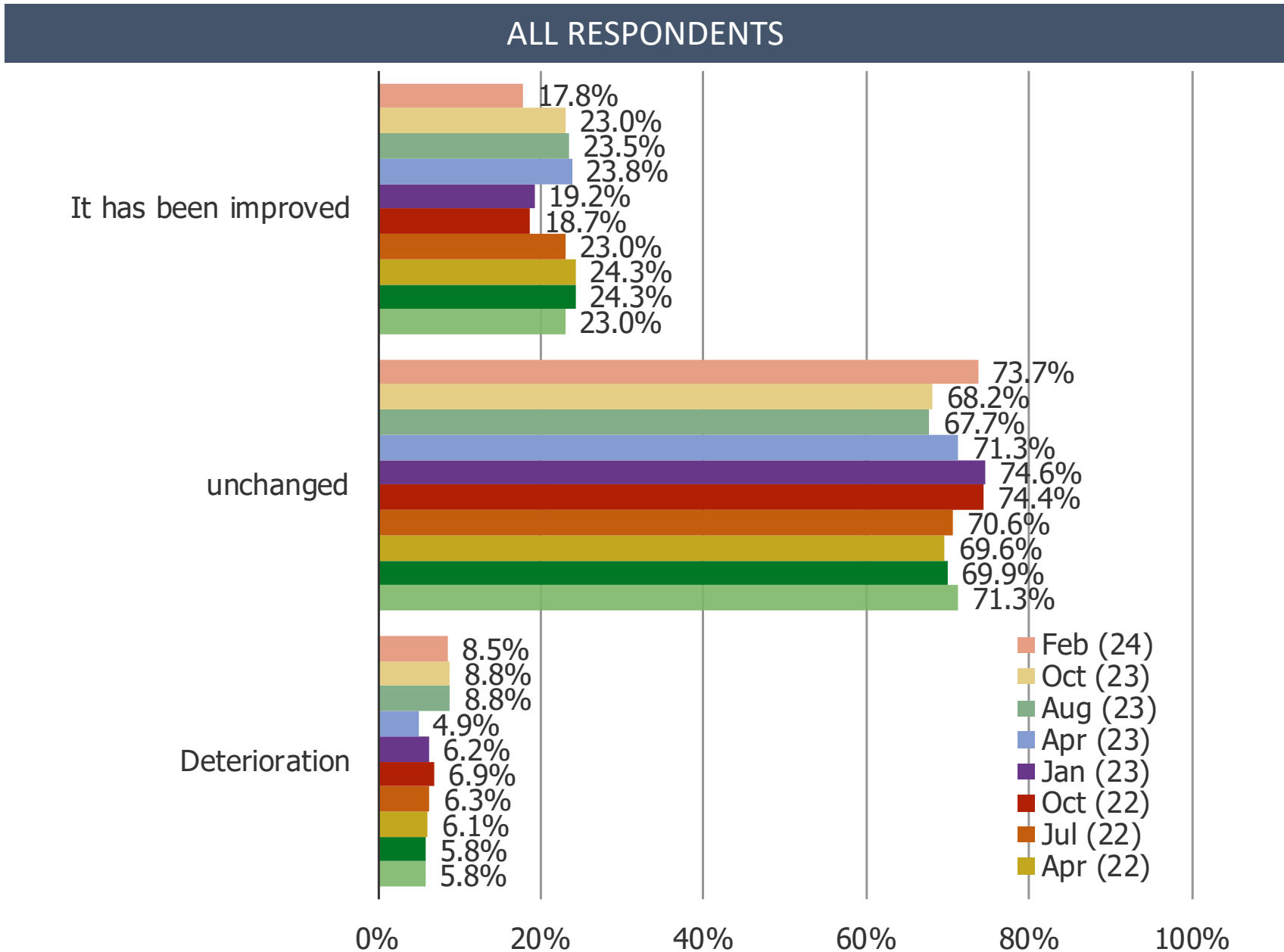
ALL RESPONDENTS



What is your opinion on luxury goods?

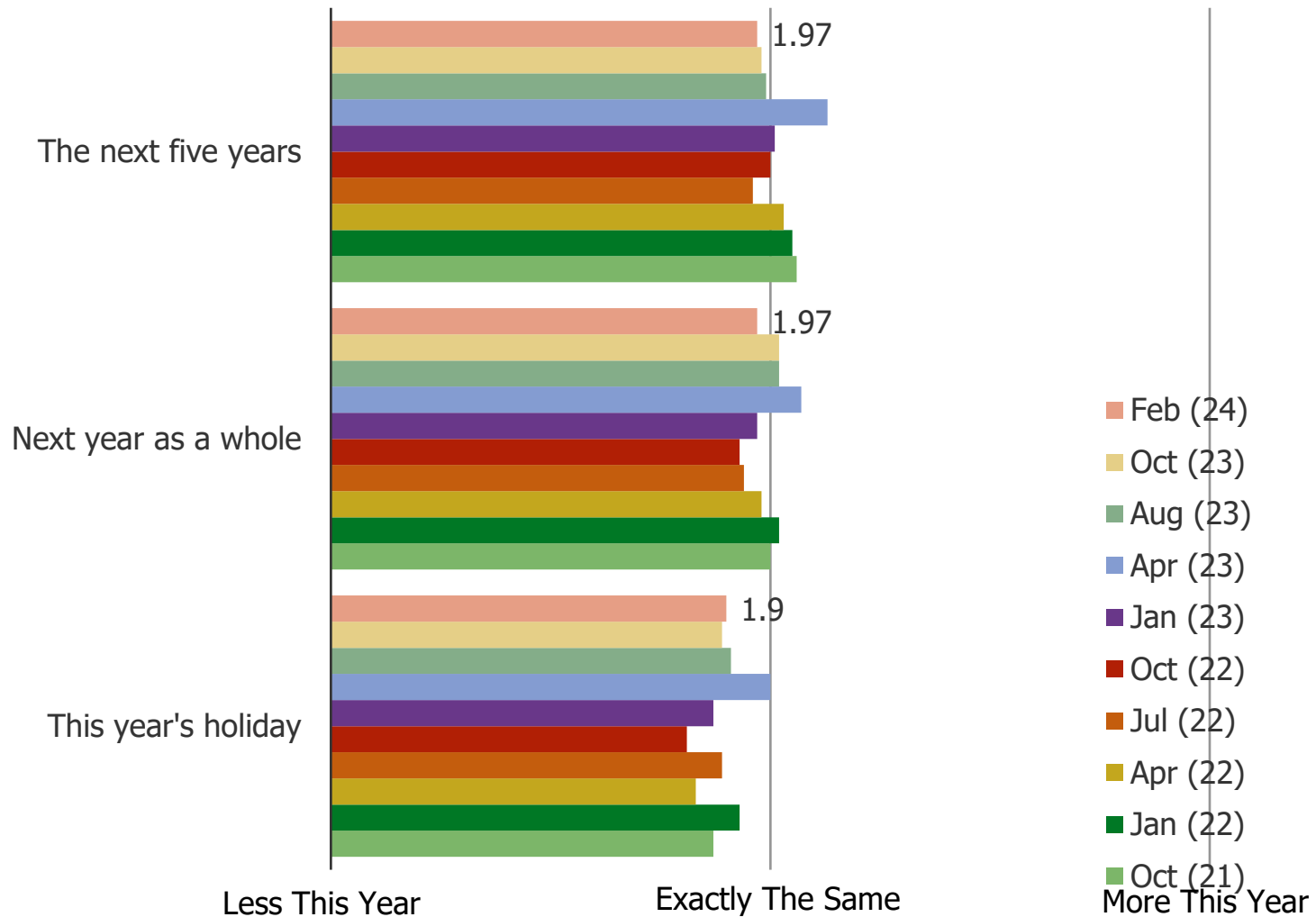


Has your opinion on luxury goods changed recently?



Compared with the amount you usually spend on luxury goods during the following periods, do you think you will spend more, less, or the same?

ALL RESPONDENTS

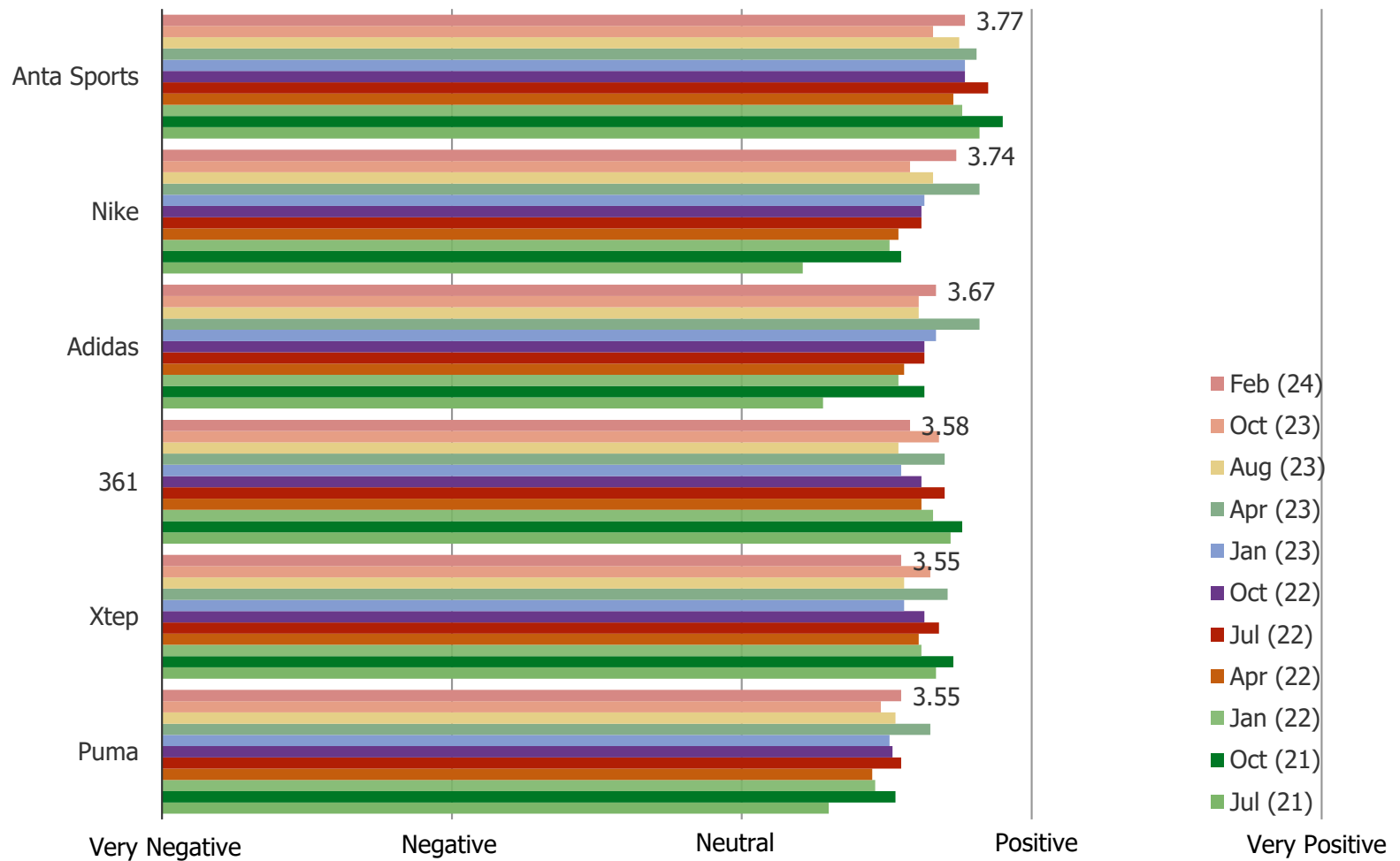


IV

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What is your opinion of the following brands?

ALL RESPONDENTS



Has your opinion of the following changed recently?

ALL RESPONDENTS

