

Bespoke Survey Research

April 2024

Temu

Volume 6 | Quarterly Survey

1,000+ US Consumers Balanced To Census

Tickers Covered: PDD, AMZN, WISH, ETSY, W, EBAY, WMT, TGT, etc.

Key Takeaways:

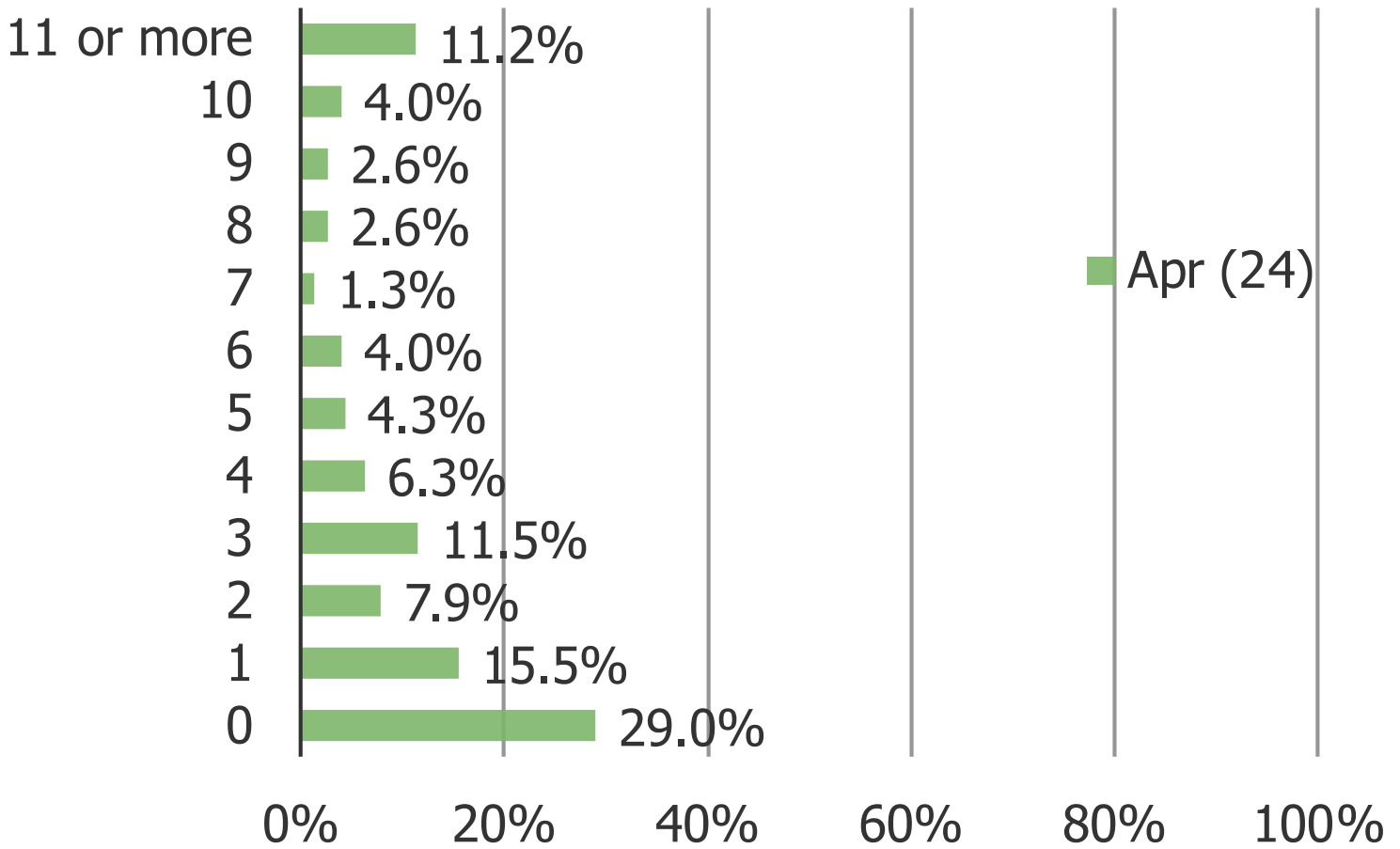
- Those who use both Amazon and Temu believe that Amazon has better delivery speeds by a wide margin.
- Those who use both Amazon and Temu believe that Temu has better prices.
- Consumers continue to express concerns around the quality of products found on Temu. Most think that Amazon does a better job on the quality front.
- Consumers are more evenly split on Amazon and Temu when it comes to which retailer is more fun to shop.
- Awareness of Temu has been more flat of late after a period of steady increases.
- The share who use Temu regularly and occasionally has also dropped a bit q/q.
- NPS focusing on those who shop Temu regularly remains strong at ~67.
- Overall NPS for those who have ever shopped Temu however continues to decline.
- Consumer opinions of Temu have steadily dropped when it comes to a number of aspects/dimensions we ask about including pricing of products, product selection, the website, the mobile app, and shipping speed. It is worth noting that with a disruptive platform gaining more and more users that earlier adopters are typically more enthusiastic about the platform than later adopters.

Temu

NEW QUESTIONS

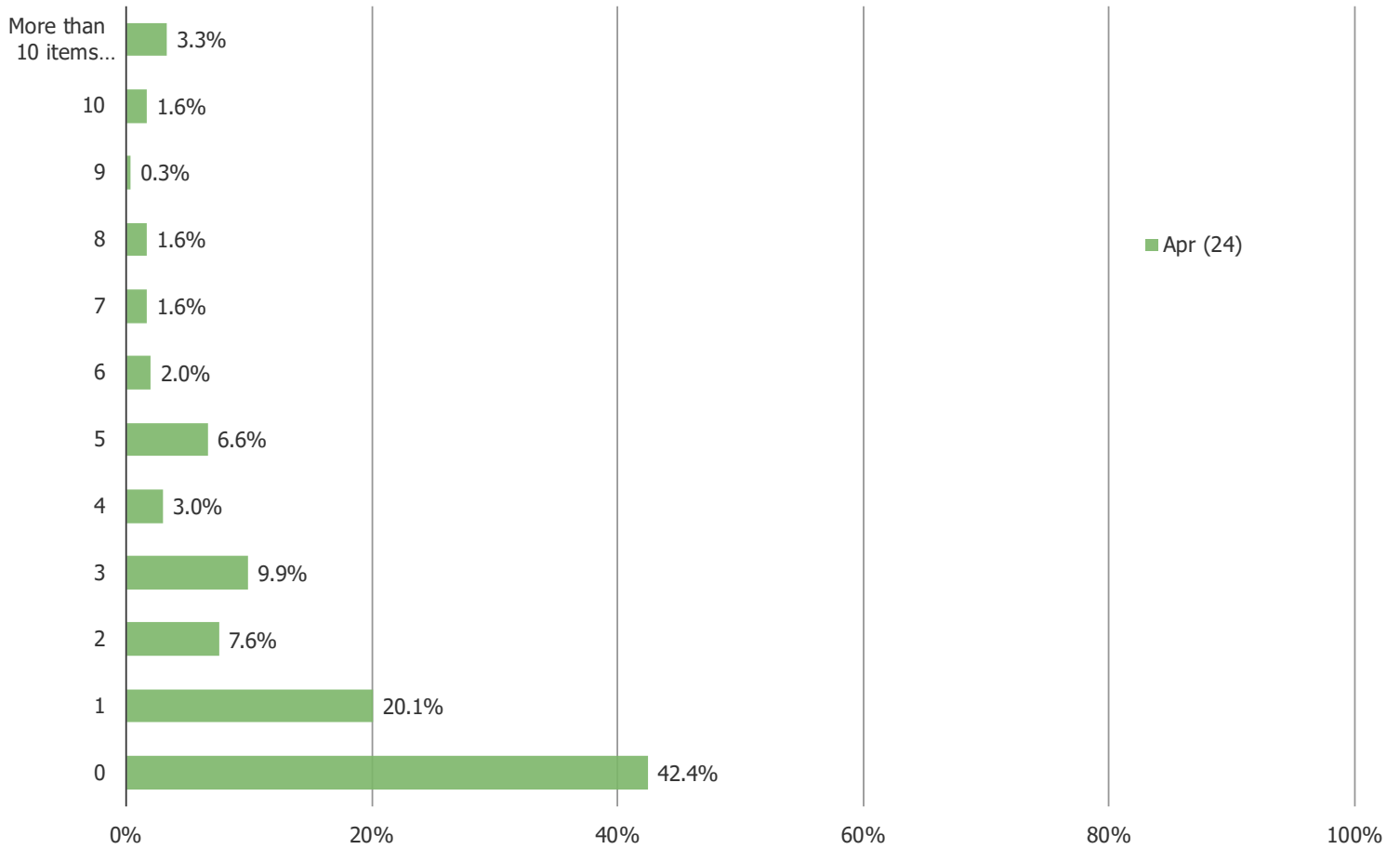
HOW MANY ITEMS HAVE YOU PURCHASED THROUGH TEMU IN THE LAST THREE MONTHS?

Posed to all respondents who have shopped Temu (N = 306).



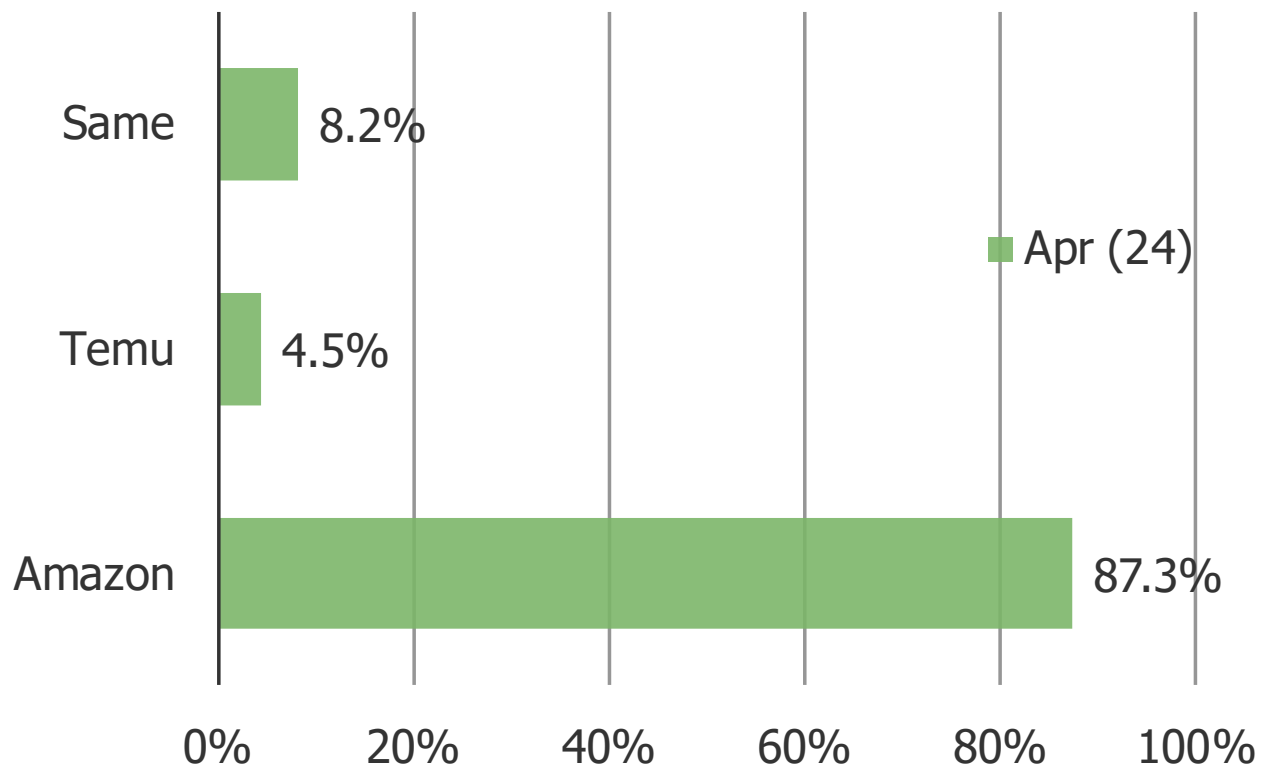
ON AVERAGE, HOW MANY ITEMS DO YOU BUY ON TEMU PER MONTH?

Posed to all respondents who have shopped Temu (N = 306).



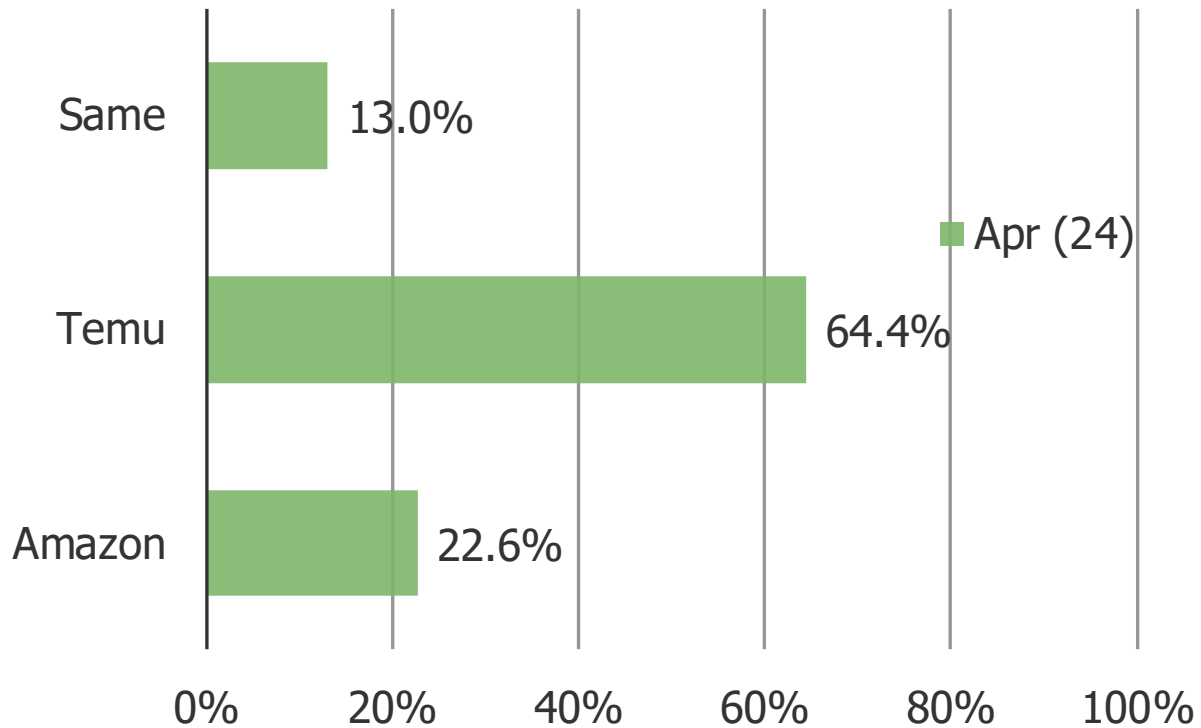
YOU MENTIONED EARLIER THAT YOU HAVE USED BOTH AMAZON AND TEMU...WHICH DO YOU THINK HAS BETTER DELIVERY SPEEDS?

Posed to all respondents who have used both Amazon and Temu (N = 294).



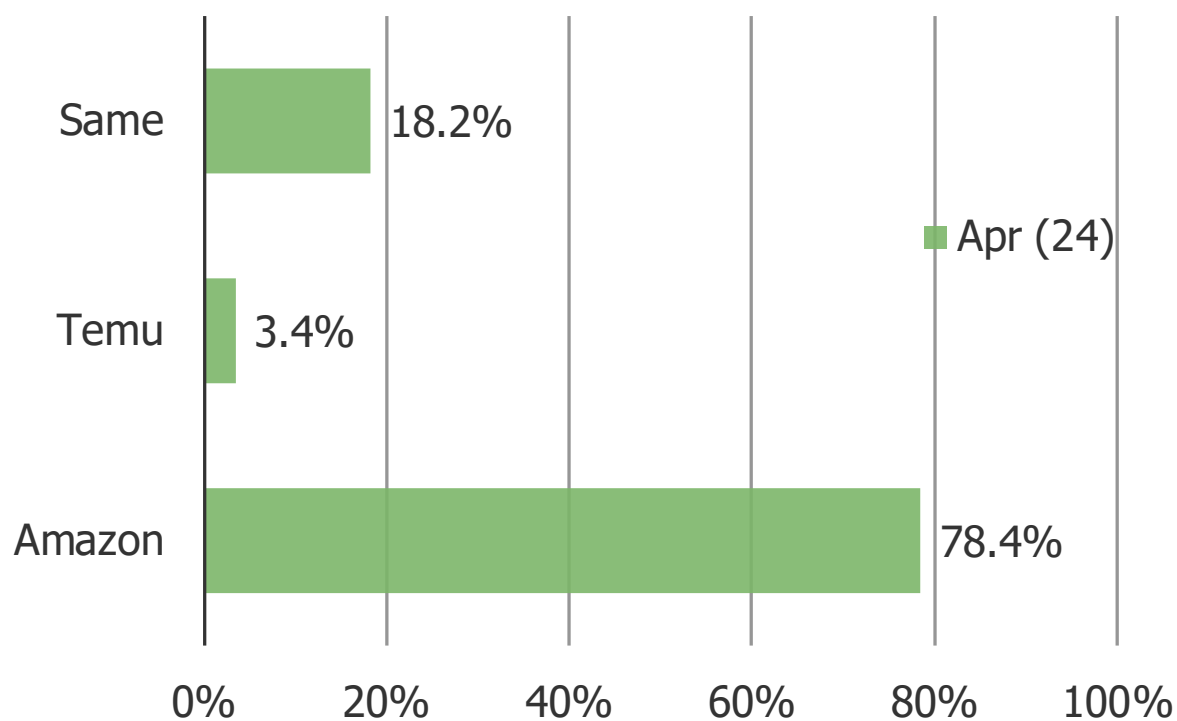
YOU MENTIONED EARLIER THAT YOU HAVE USED BOTH AMAZON AND TEMU...WHICH DO YOU THINK HAS BETTER PRICES?

Posed to all respondents who have used both Amazon and Temu (N = 294).



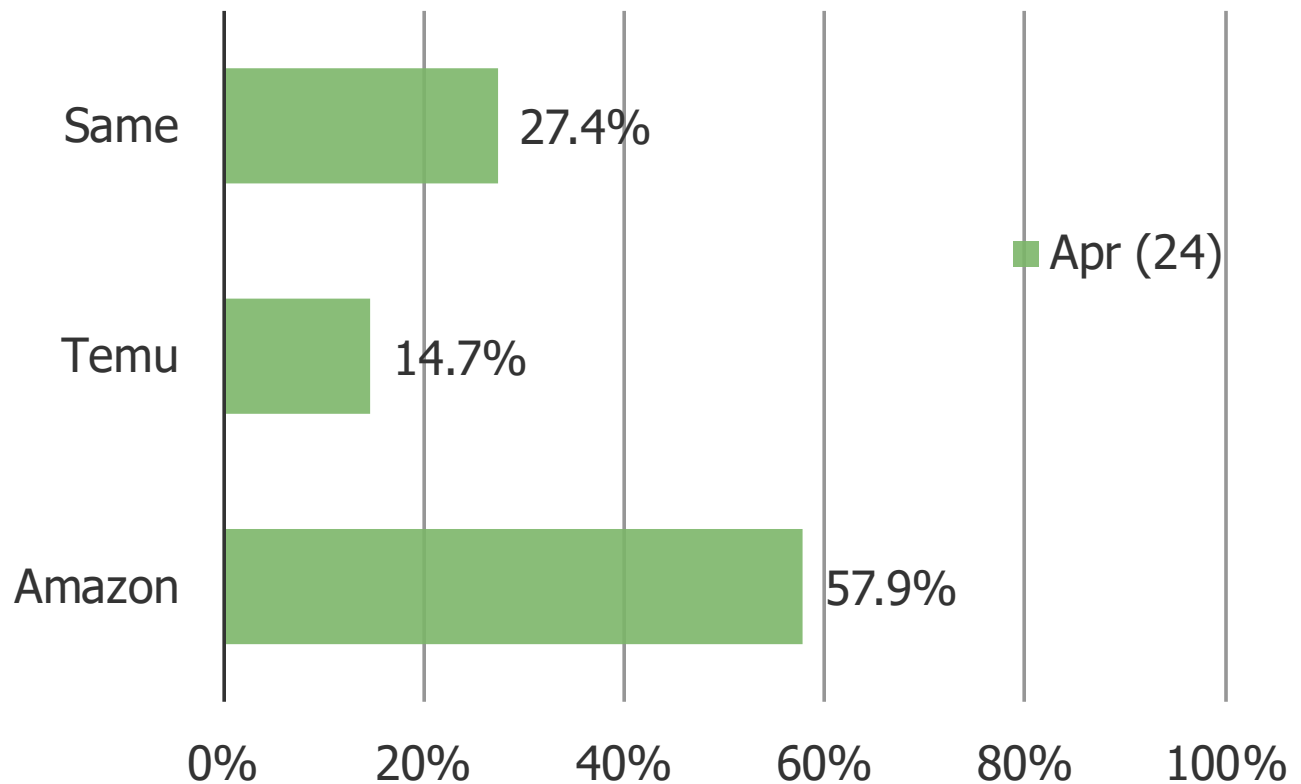
YOU MENTIONED EARLIER THAT YOU HAVE USED BOTH AMAZON AND TEMU...WHICH DO YOU THINK HAS BETTER QUALITY PRODUCTS?

Posed to all respondents who have used both Amazon and Temu (N = 294).



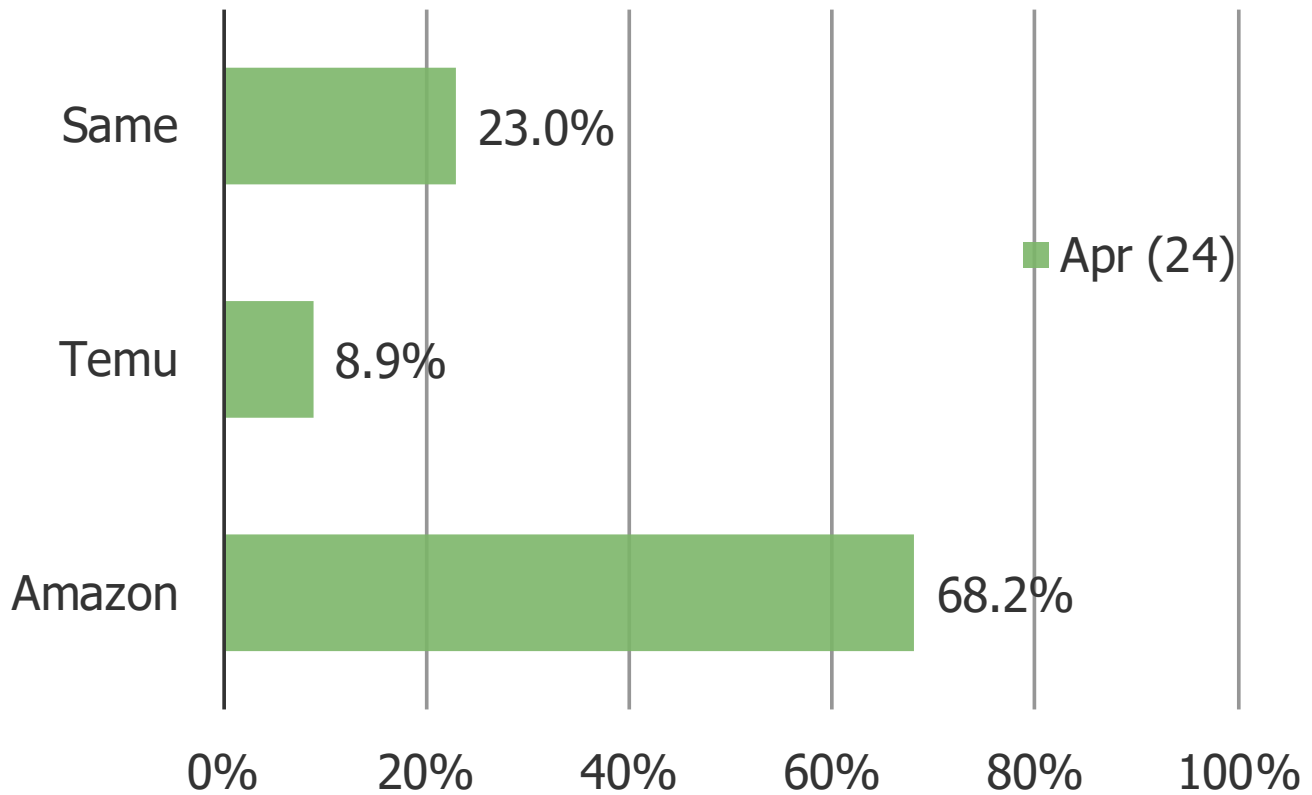
YOU MENTIONED EARLIER THAT YOU HAVE USED BOTH AMAZON AND TEMU...WHICH DO YOU THINK HAS BETTER SELECTION?

Posed to all respondents who have used both Amazon and Temu (N = 294).



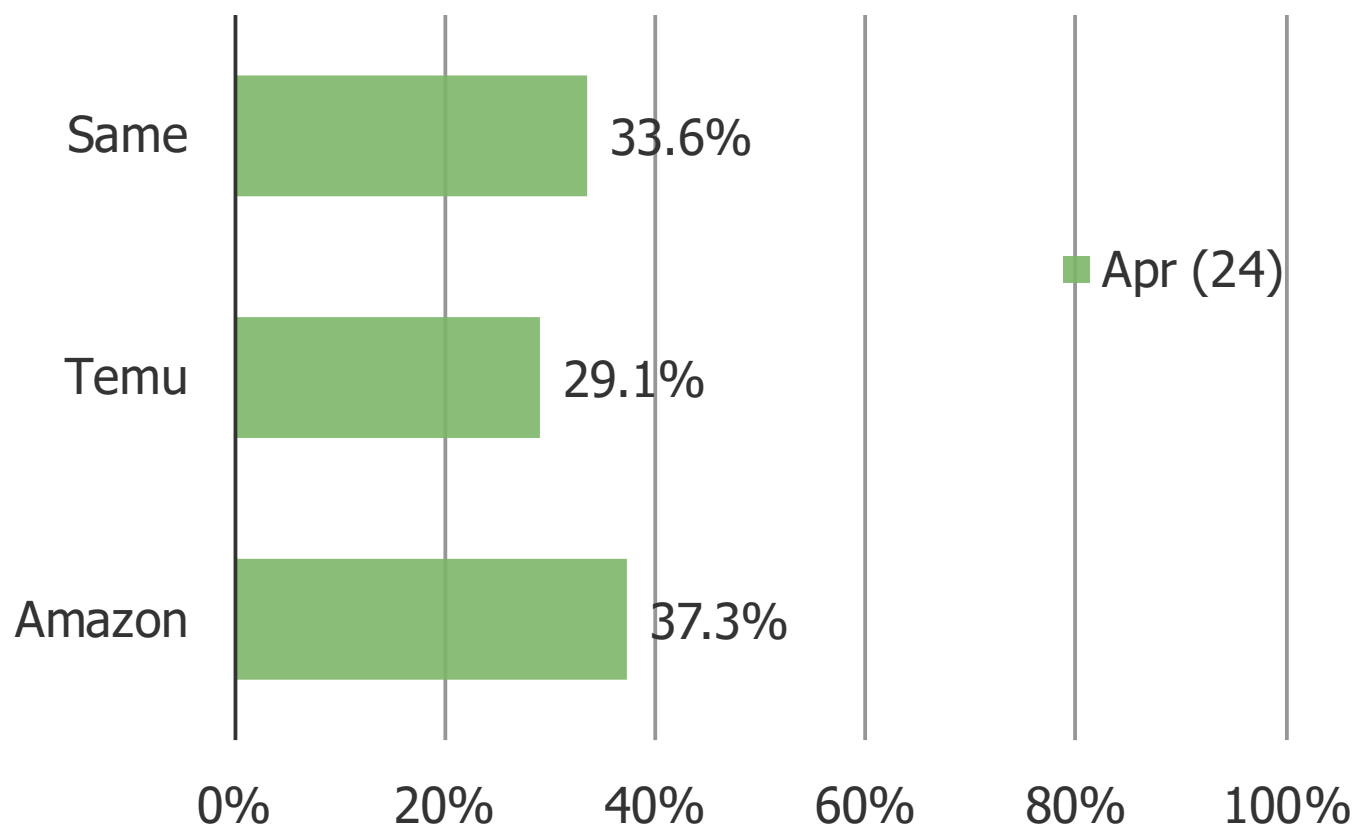
YOU MENTIONED EARLIER THAT YOU HAVE USED BOTH AMAZON AND TEMU...WHICH DO YOU THINK IS BETTER FOR RETURNS?

Posed to all respondents who have used both Amazon and Temu (N = 294).



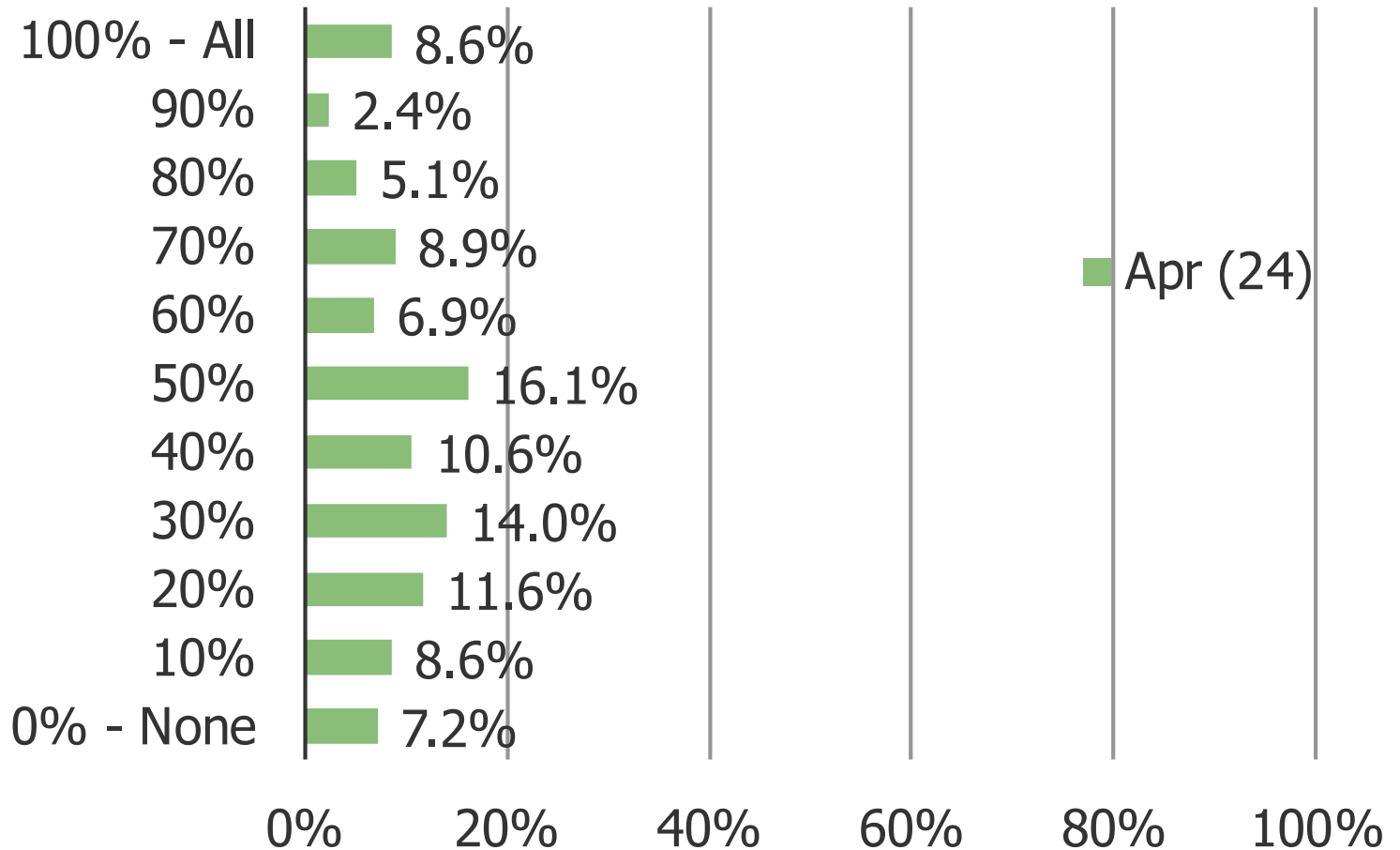
YOU MENTIONED EARLIER THAT YOU HAVE USED BOTH AMAZON AND TEMU...WHICH DO YOU THINK IS MORE FUN TO SHOP?

Posed to all respondents who have used both Amazon and Temu (N = 294).



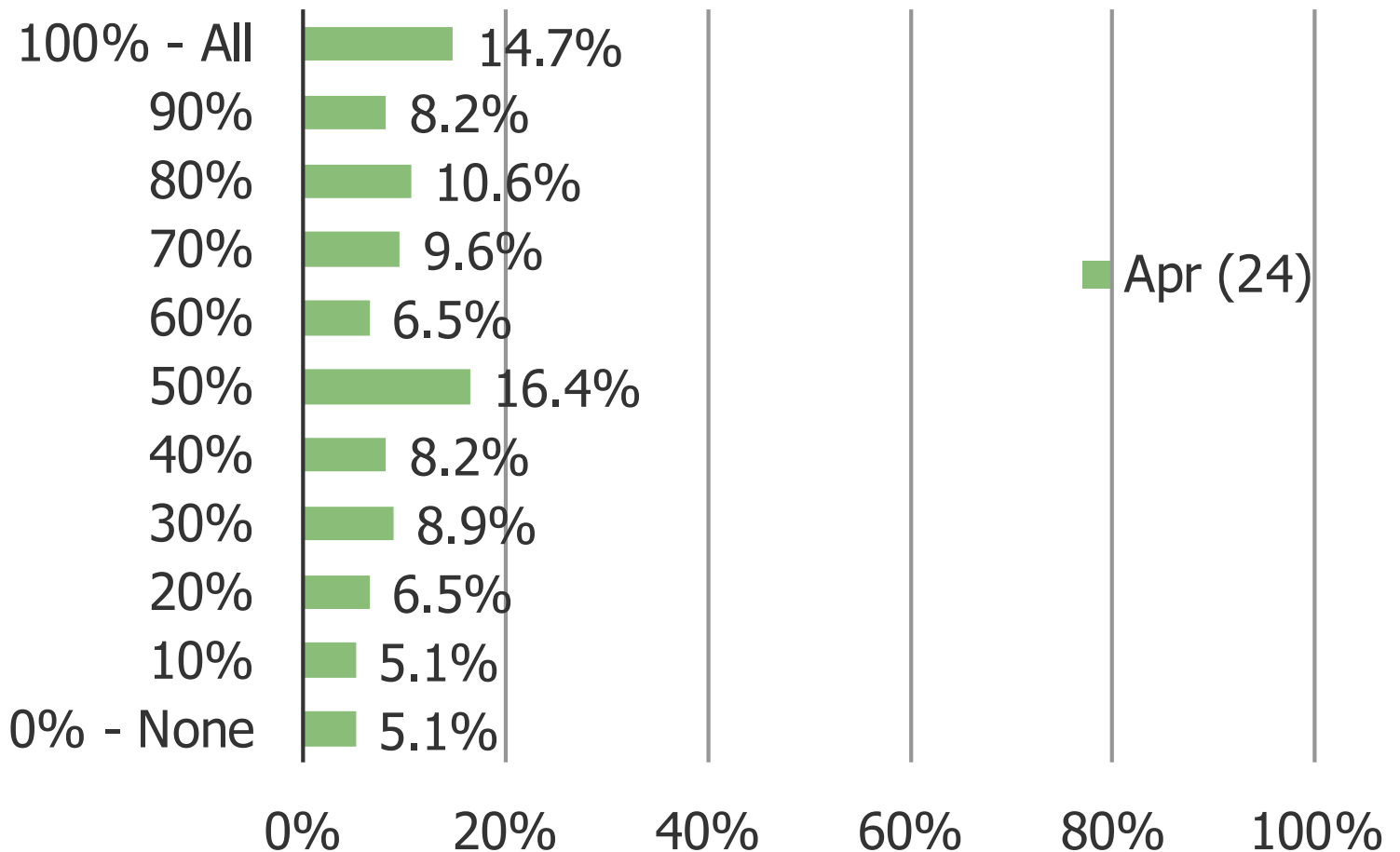
WHAT PERCENTAGE OF ITEMS THAT YOU WOULD TYPICALLY BUY ON AMAZON DO YOU THINK YOU COULD ALSO FIND ON TEMU?

Posed to all respondents who have used both Amazon and Temu (N = 294).



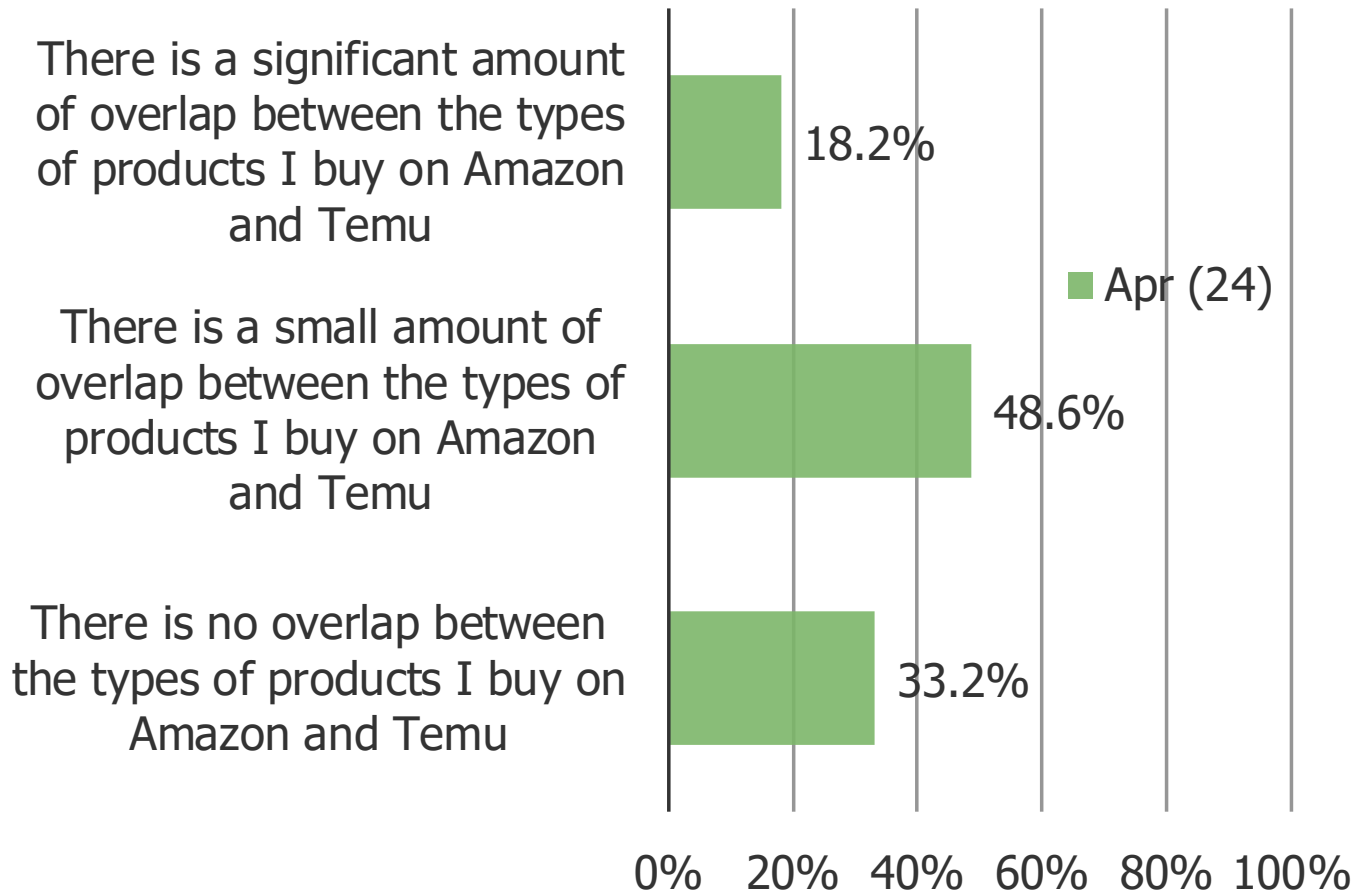
WHAT PERCENTAGE OF ITEMS THAT YOU WOULD TYPICALLY BUY ON TEMU DO YOU THINK YOU COULD ALSO FIND ON AMAZON?

Posed to all respondents who have used both Amazon and Temu (N = 294).



WHICH OF THE FOLLOWING BEST DESCRIBES YOU?

Posed to all respondents who have used both Amazon and Temu (N = 294).

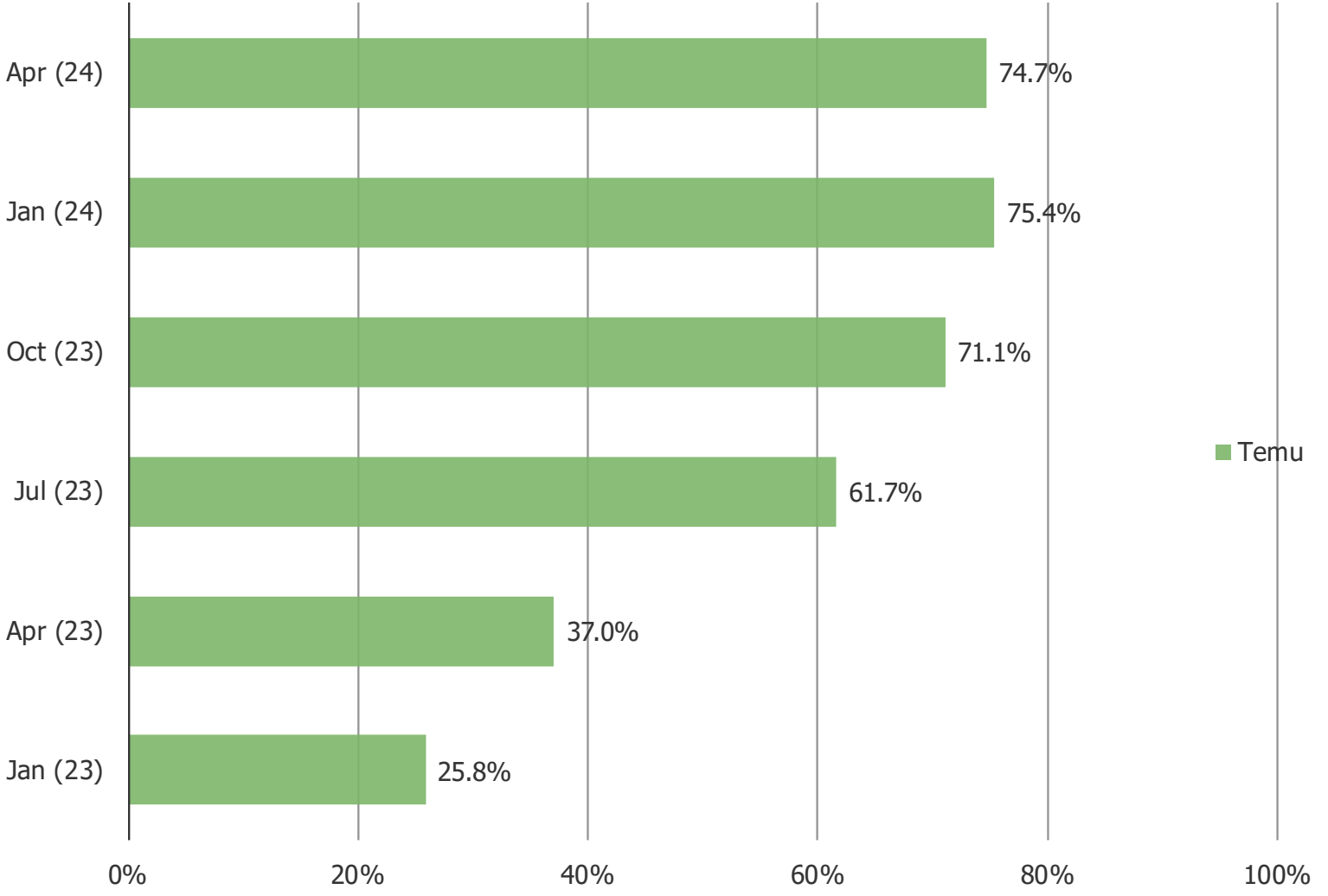


Temu

TEMU ENGAGEMENT AND SENTIMENT

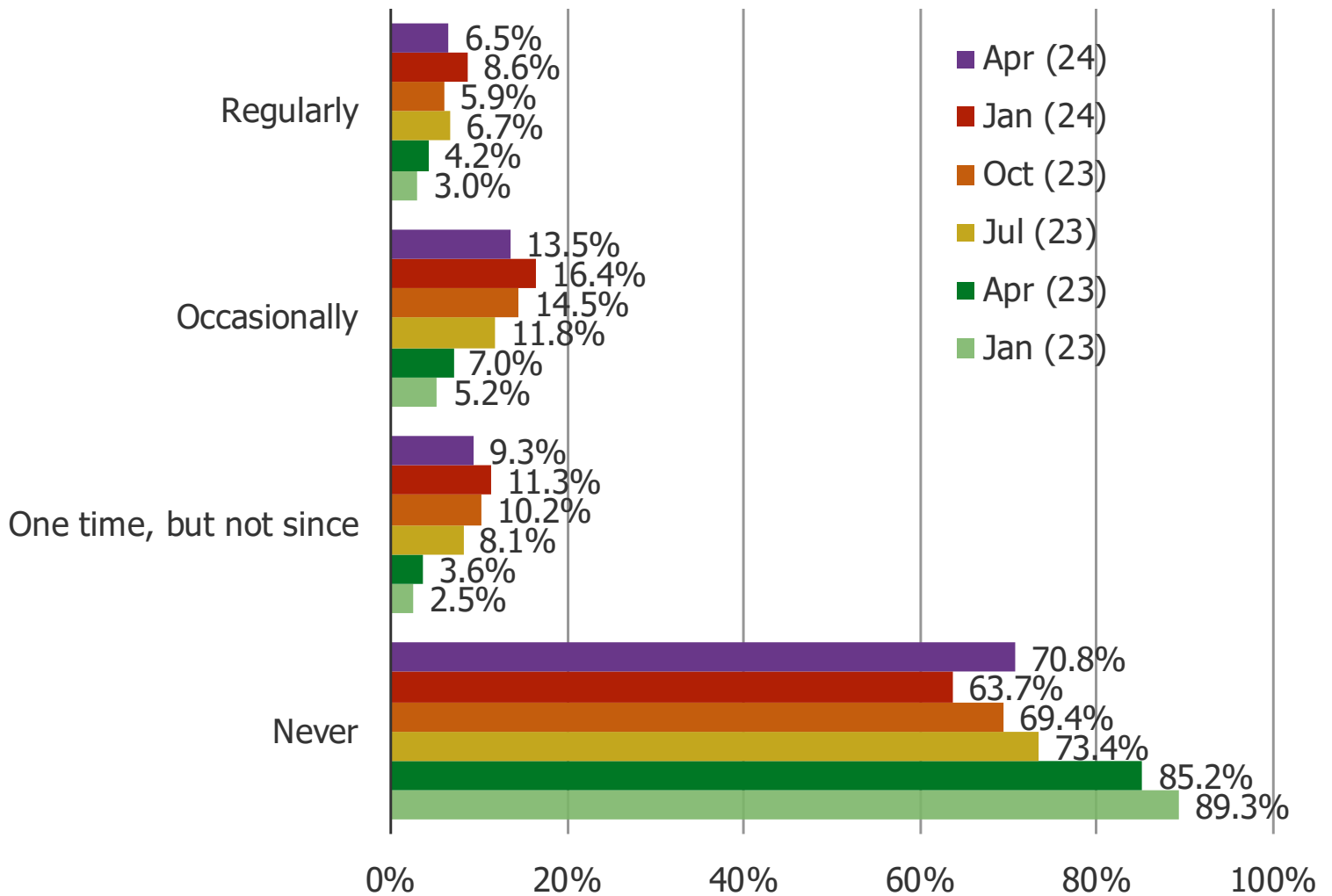
% AWARE OF TEMU

Posed to all respondents



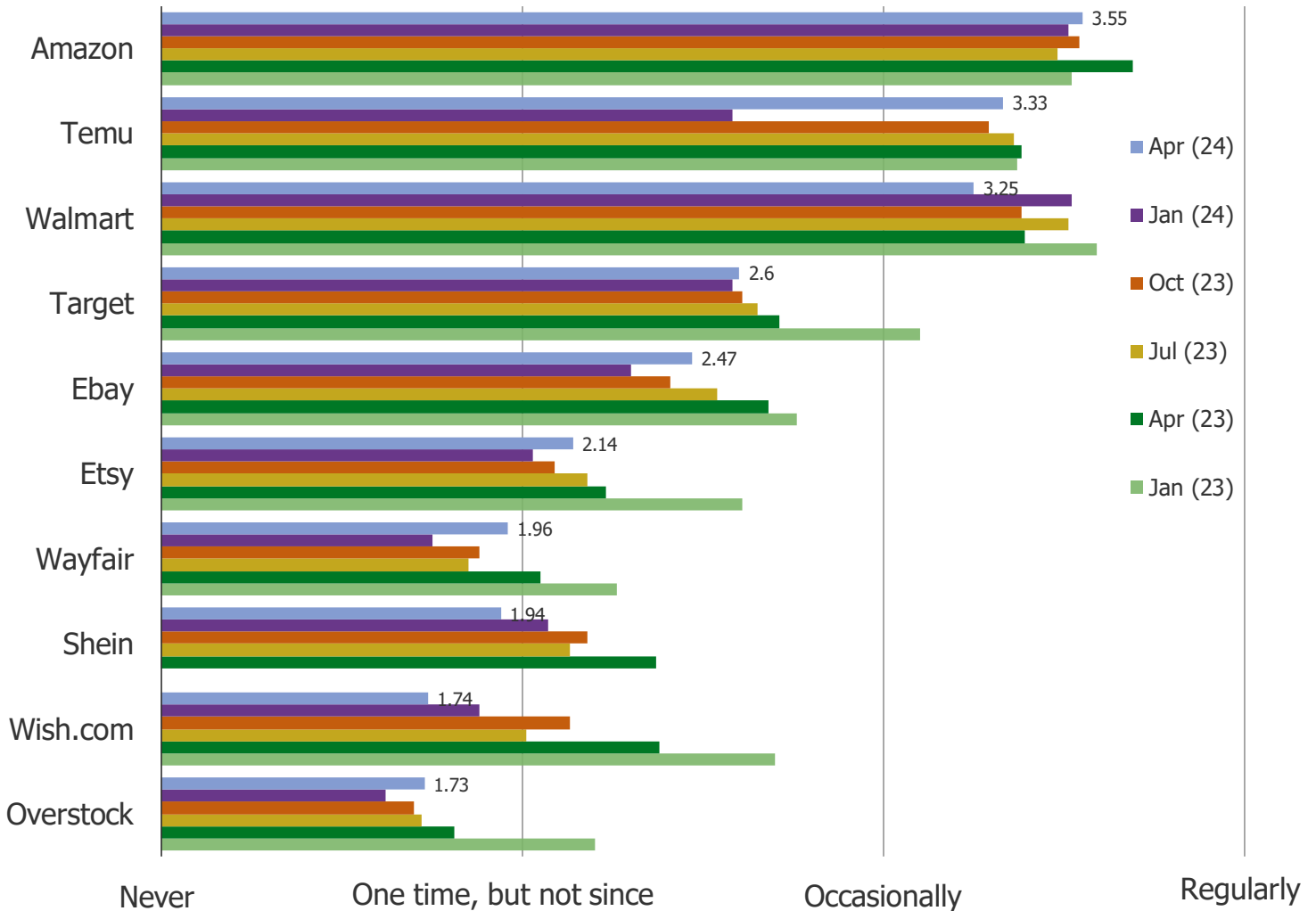
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH TEMU?

Posed to all respondents



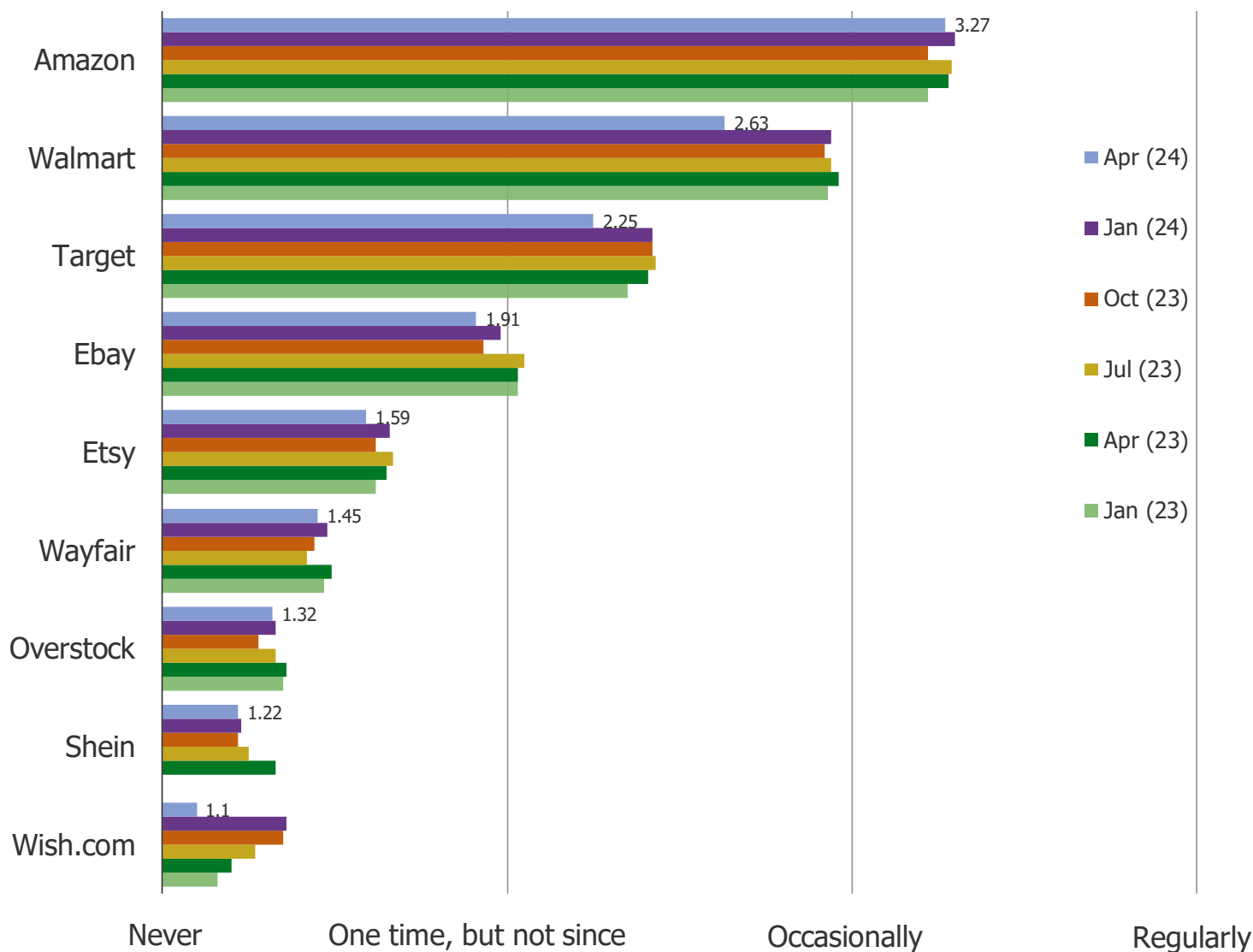
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH THE FOLLOWING PLATFORMS?

Posed to respondents **who said they shop Temu Regularly or Occasionally** (N = ~200 per wave, less in the earlier waves)



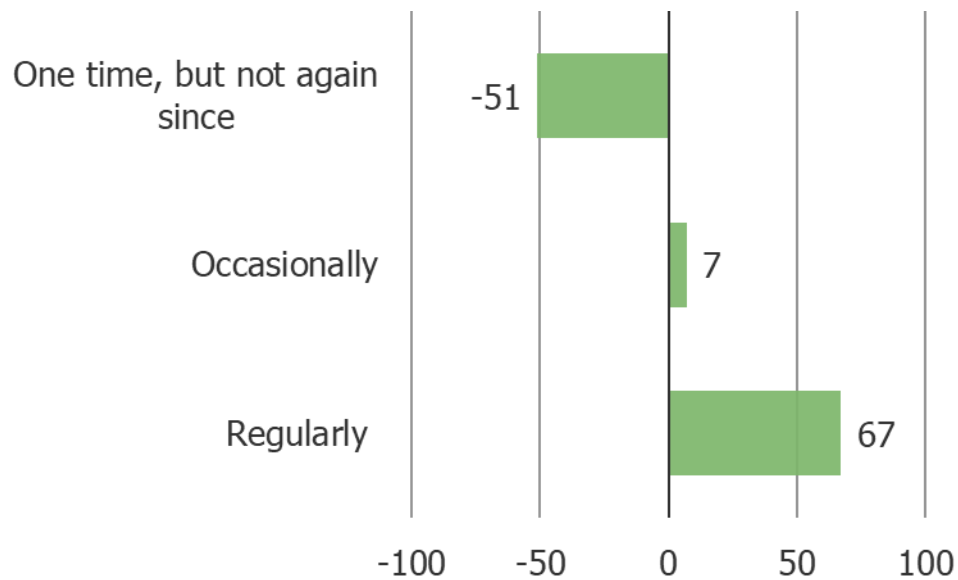
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH THE FOLLOWING PLATFORMS?

Posed to respondents **who said they have never shopped Temu** (N = ~600 per wave, less in the earlier waves)

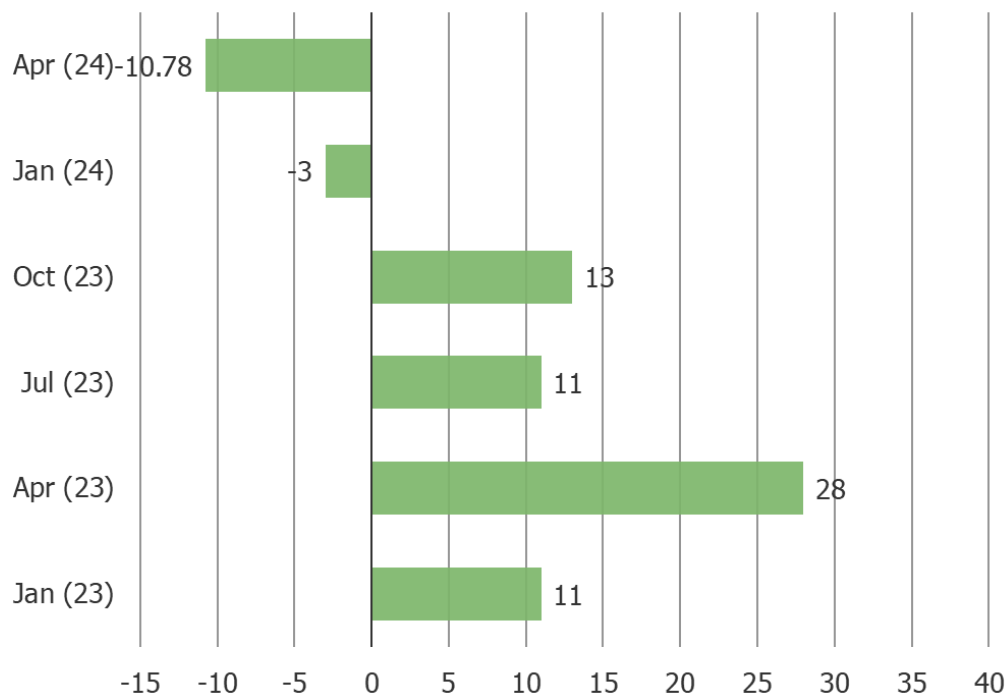


HOW LIKELY IS IT THAT YOU WOULD RECOMMEND TEMU TO A FRIEND OR COLLEAGUE?

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

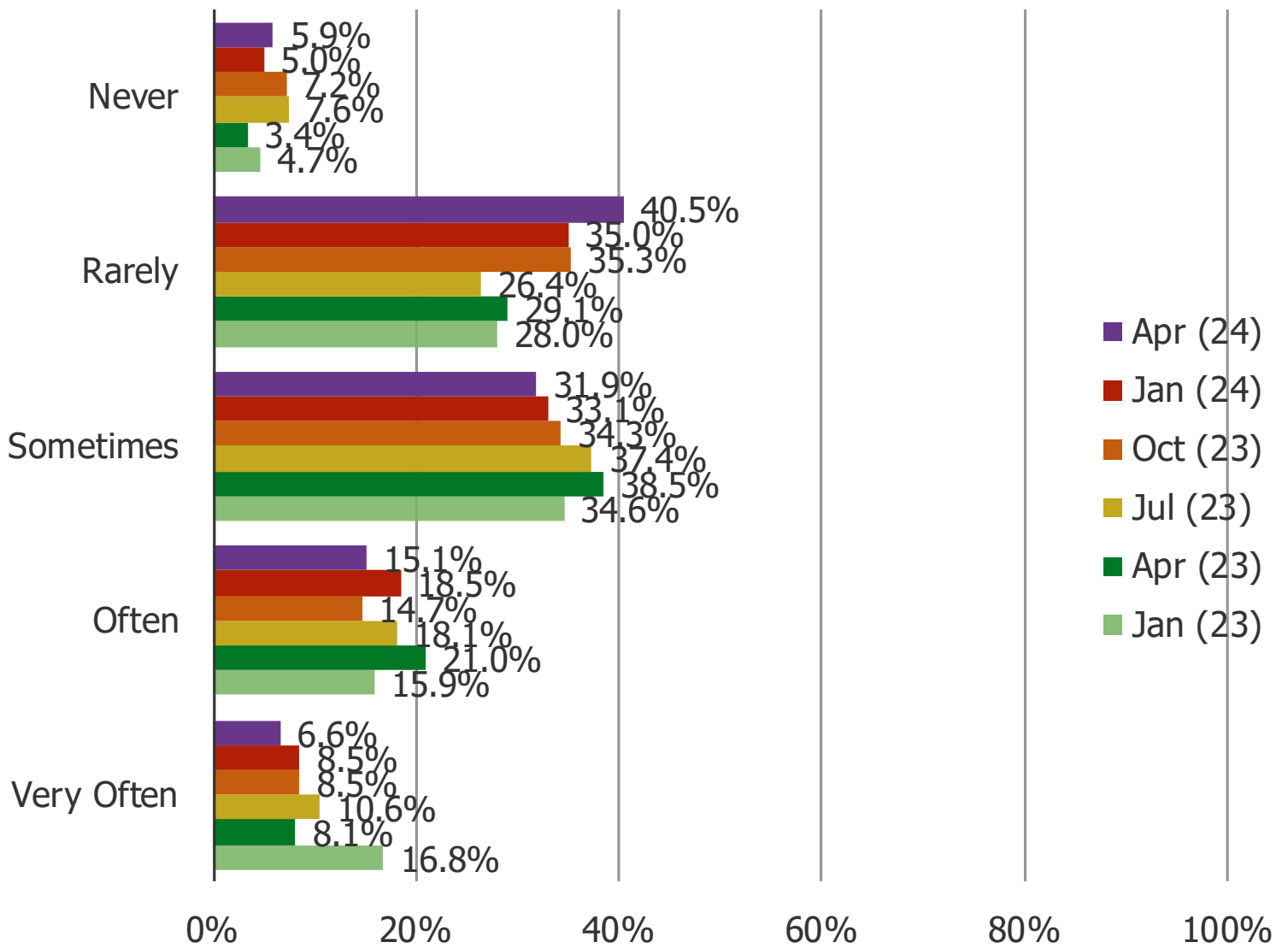


All who have shopped Temu (ever), wave by wave.



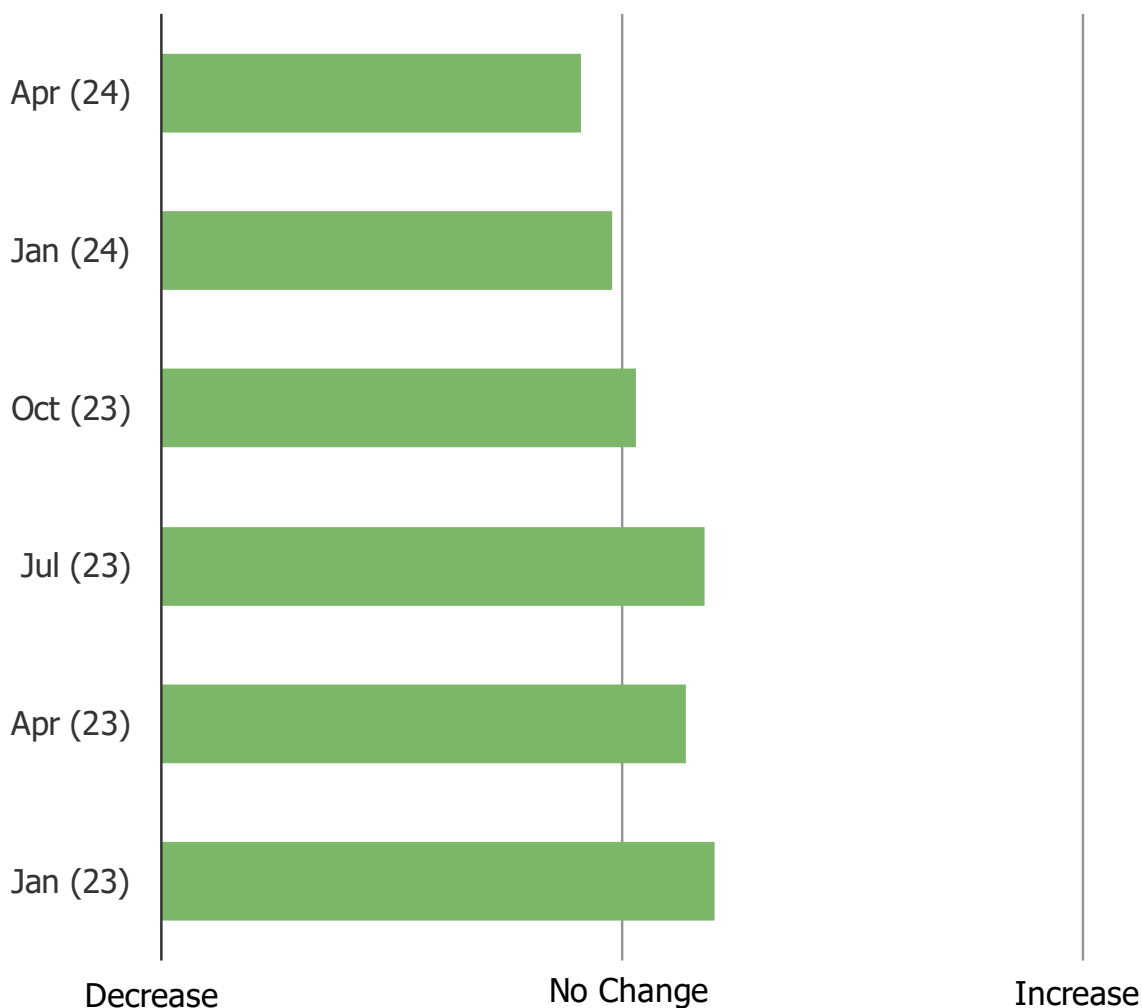
HOW OFTEN DO YOU BUY PRODUCTS ON TEMU?

Posed to all respondents who have shopped Temu (N = 306)



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

Posed to all respondents who have shopped Temu (N = 306)



Reasons cited for decreasing:

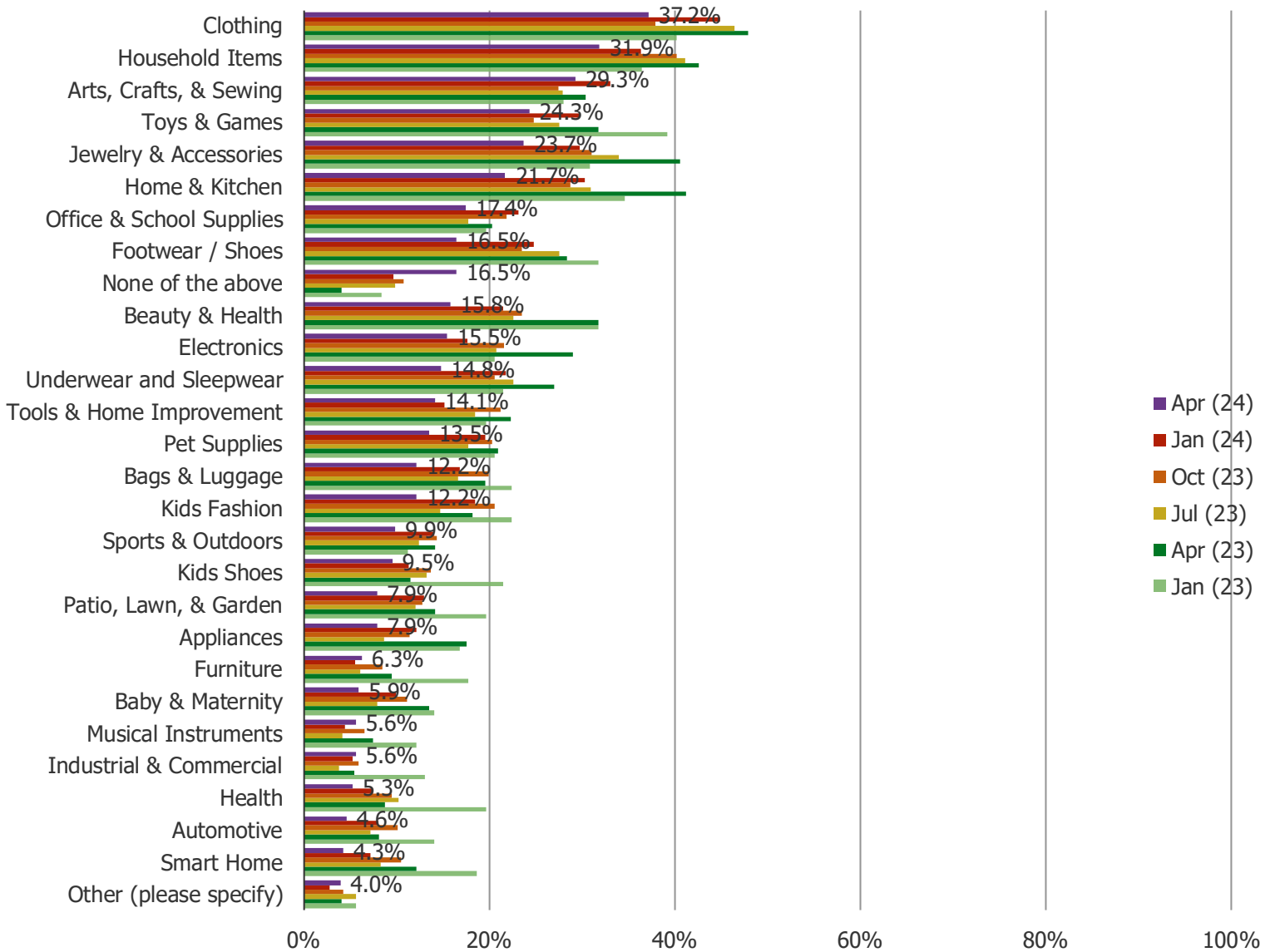
- Poor quality
- Made in China
- Slow shipping
- Cutting back spending in general

Reasons cited for increasing:

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

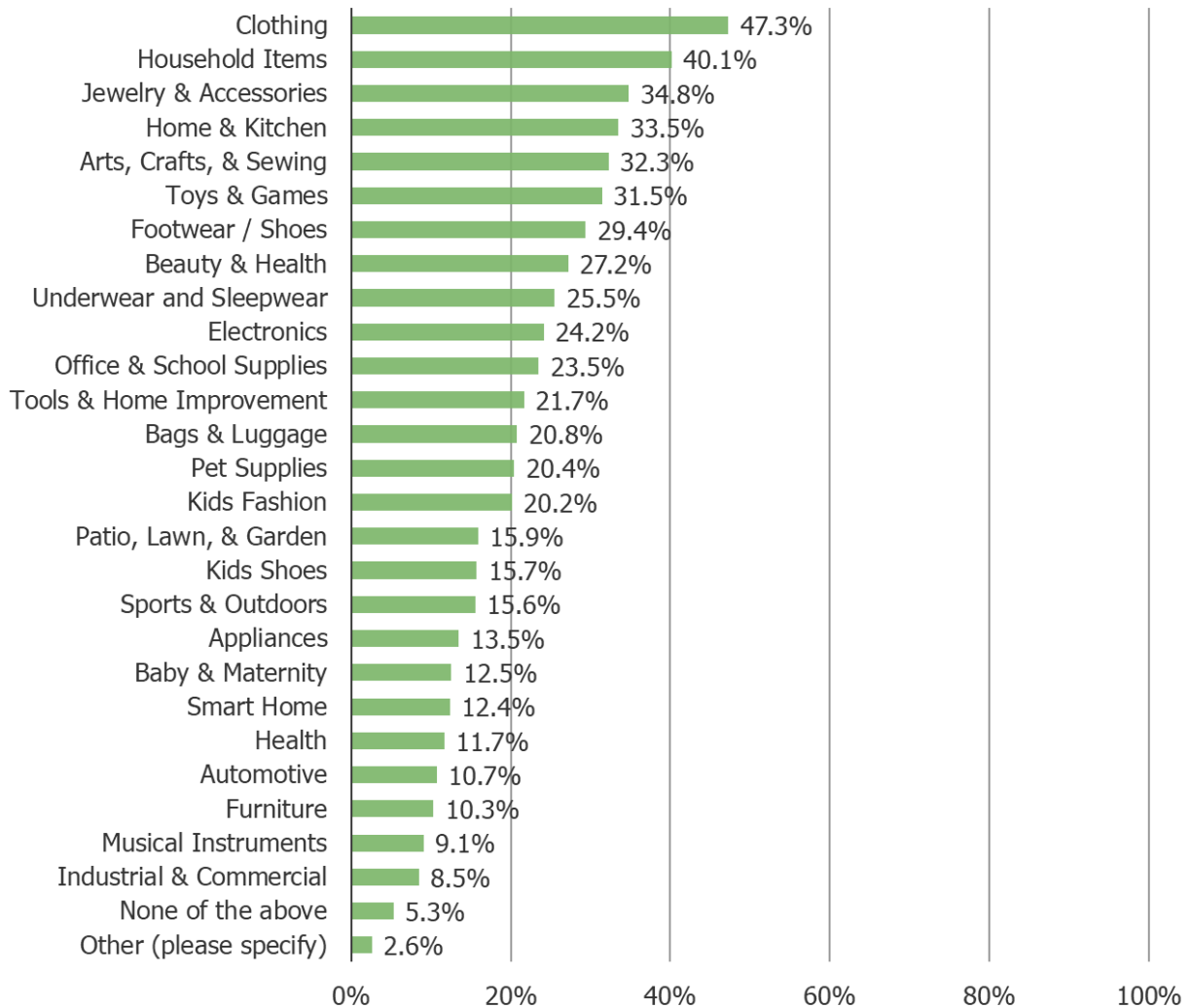
WHICH TYPES OF PRODUCTS DO YOU FEEL TEMU IS BEST FOR? SELECT ALL THAT APPLY

Posed to all respondents who have shopped Temu (N = 306)



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

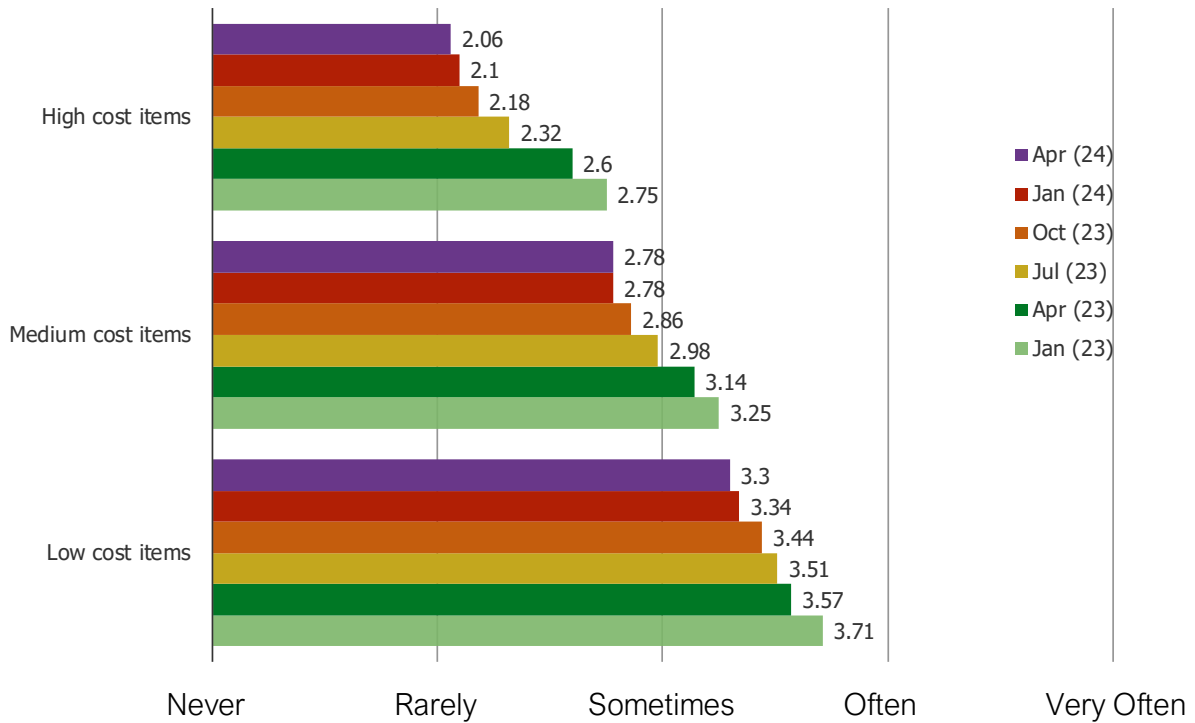
Posed to respondents who said they shop Temu regularly/occasionally (N = 1221)



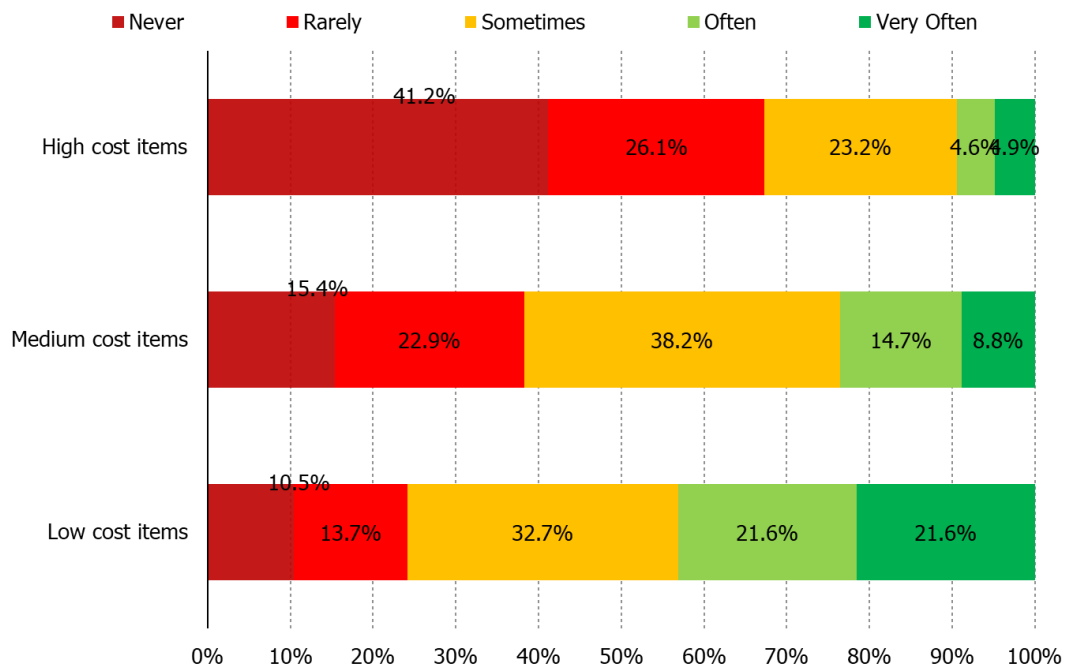
*Combining all responses from all waves to date (2023+2024 ytd) to increase N size for the most frequent Temu customers...

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

Posed to all respondents who have shopped Temu (N = 306)



April 2024 Breakout

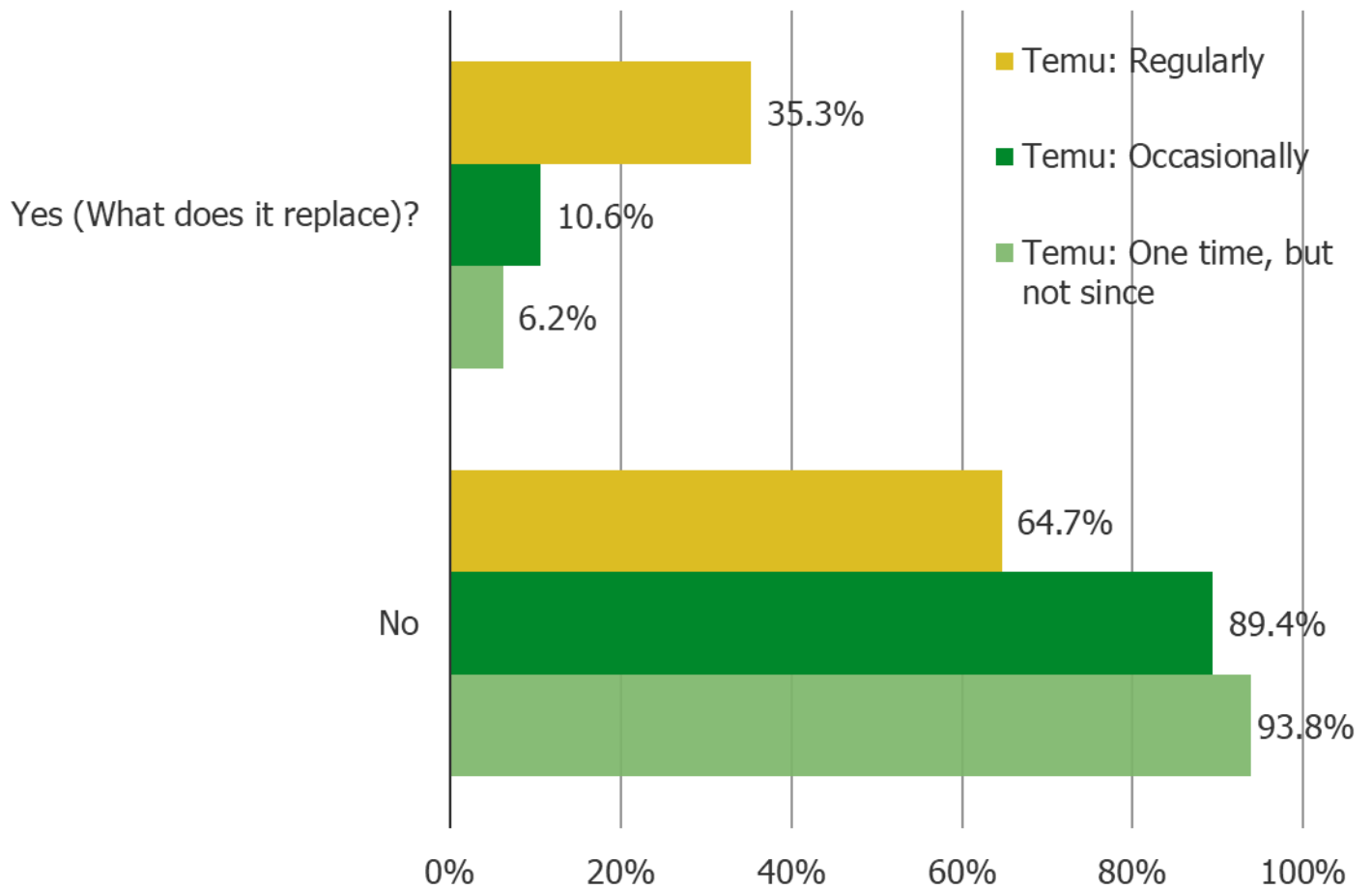


Temu

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?

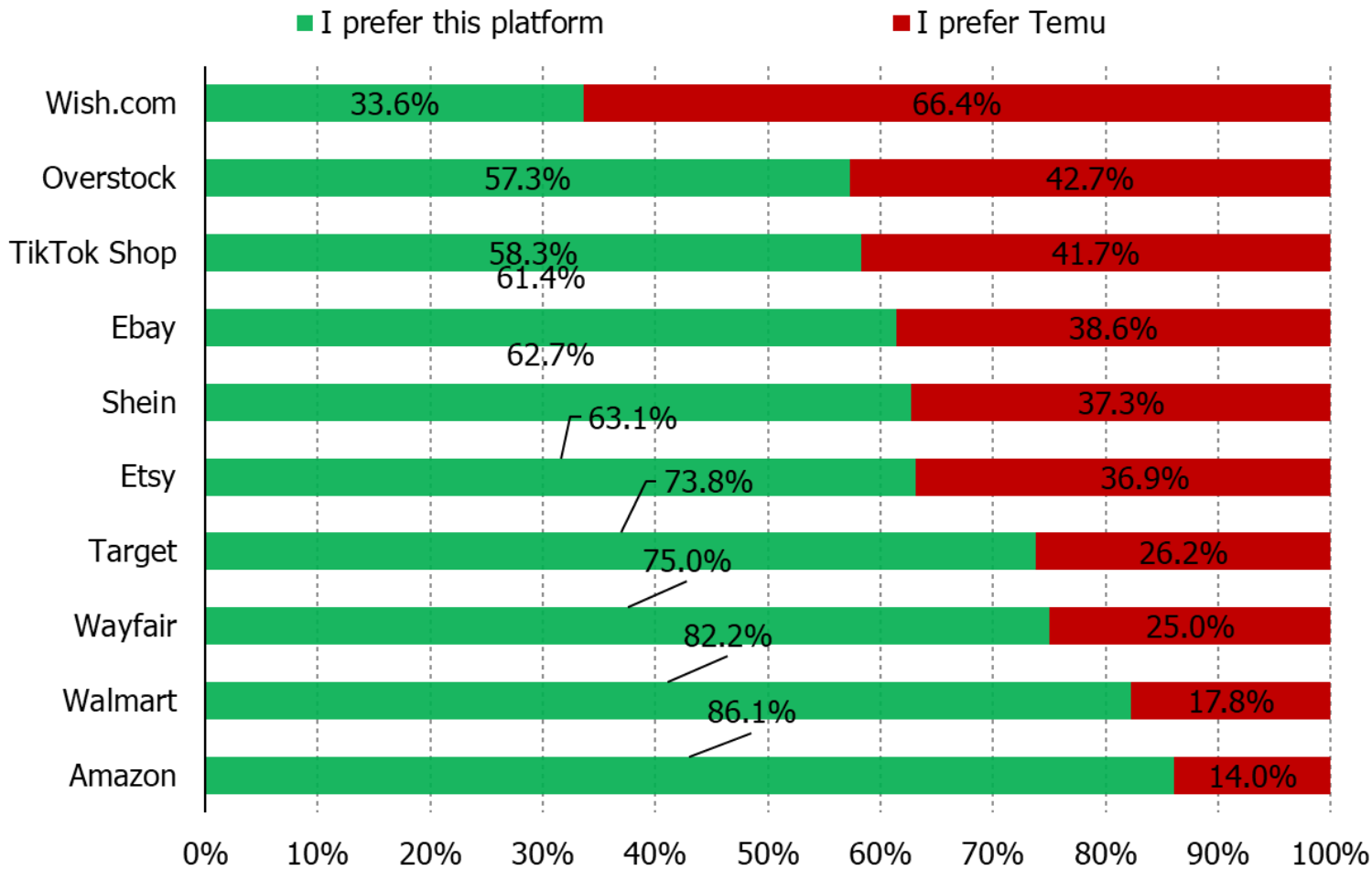
Cross-Tab Analysis – by how often respondents shop Temu.



Ie, 35.3% 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?

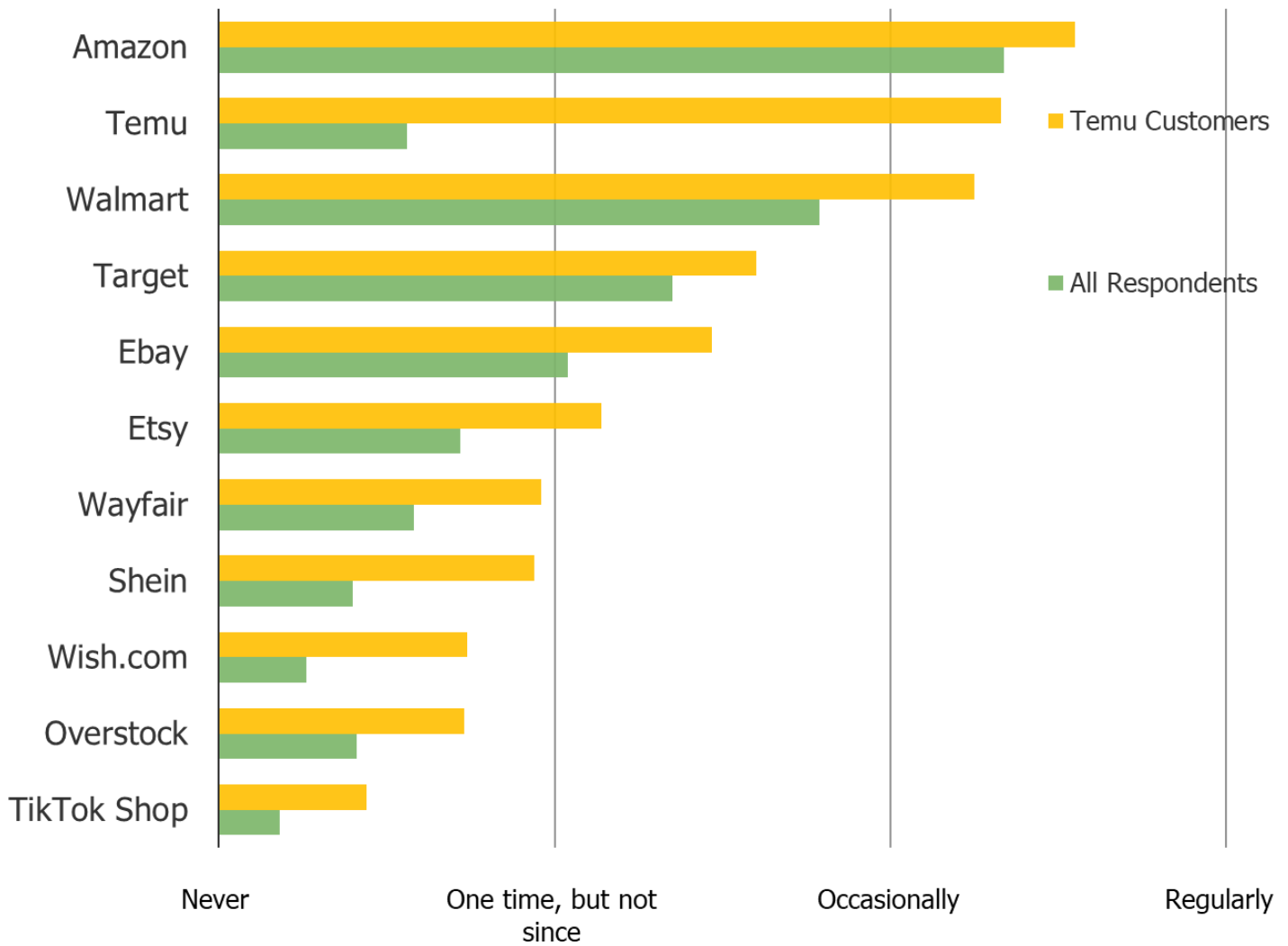
Posed to all respondents who have shopped Temu AND also shop the following.



	N=
Amazon	294
Walmart	270
Wayfair	148
Target	225
Etsy	168
Shein	134
Ebay	215
TikTok Shop	60
Overstock	117
Wish.com	113

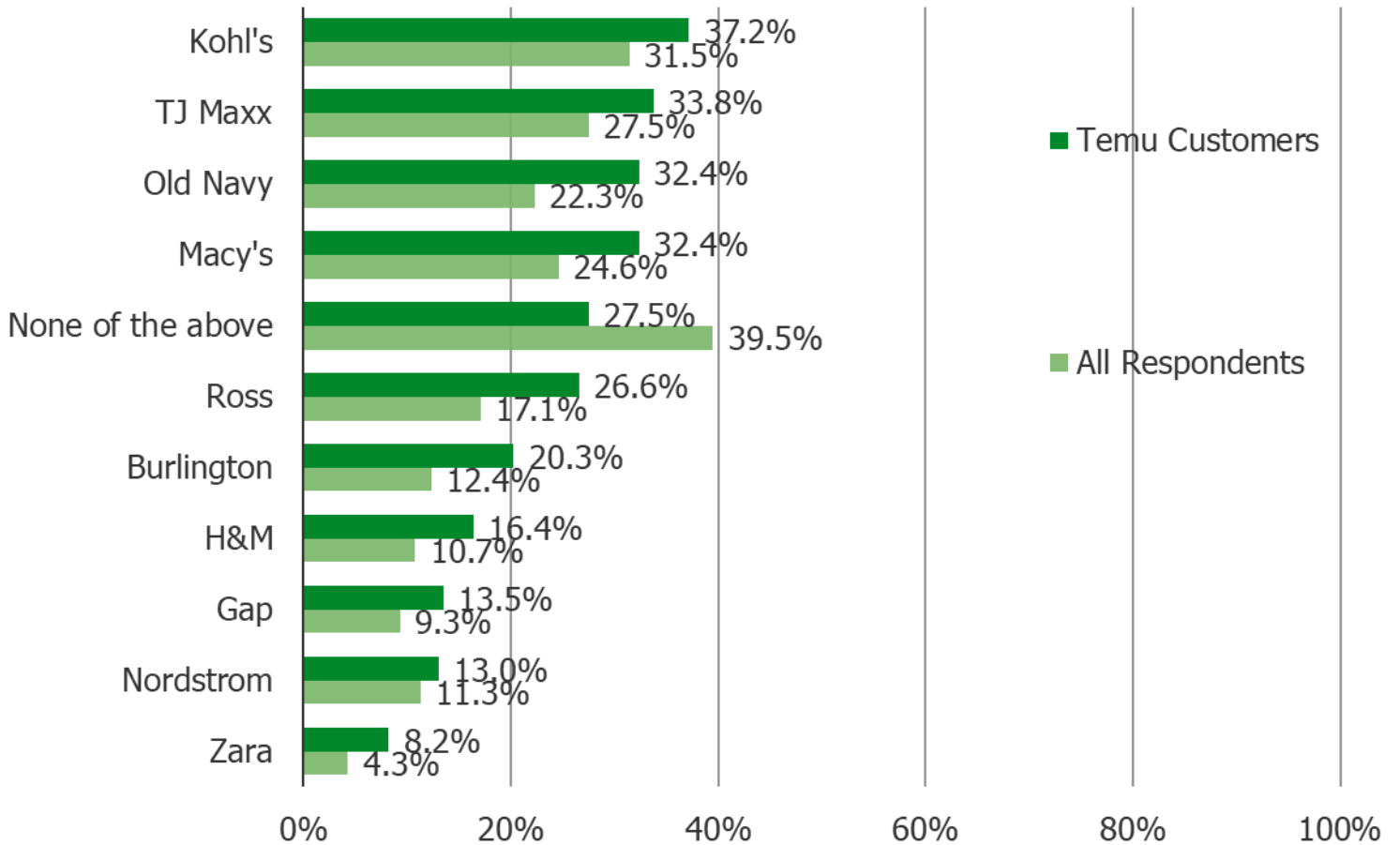
WHICH OF THE FOLLOWING DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH EACH OF THE FOLLOWING WEBSITES/APPS?

Posed to all respondents vs. respondents who are regular **Temu customers**. (N= 209)



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 regular **Temu customers**. (N= 209)

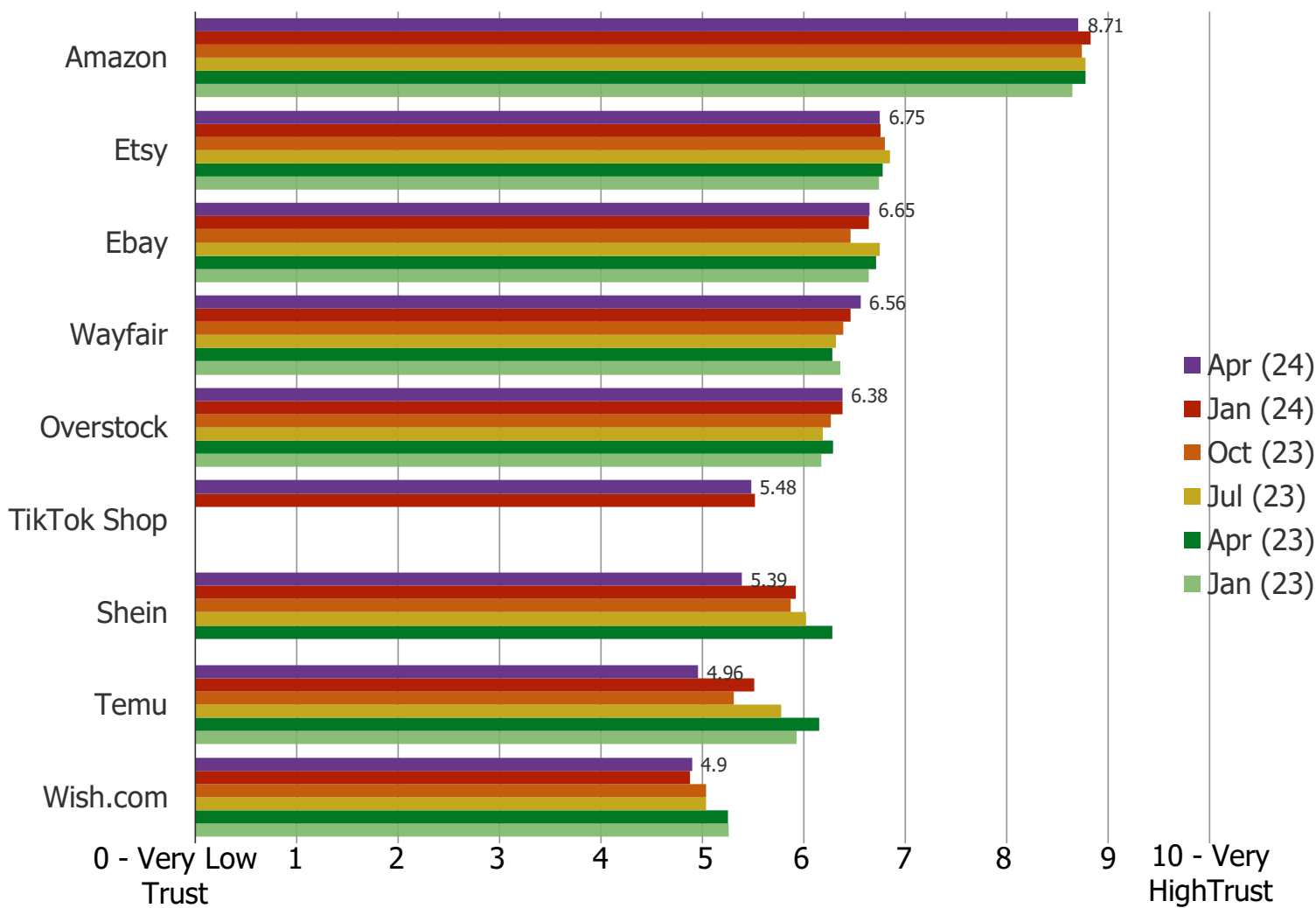


Temu

COMPETITIVE DYNAMICS

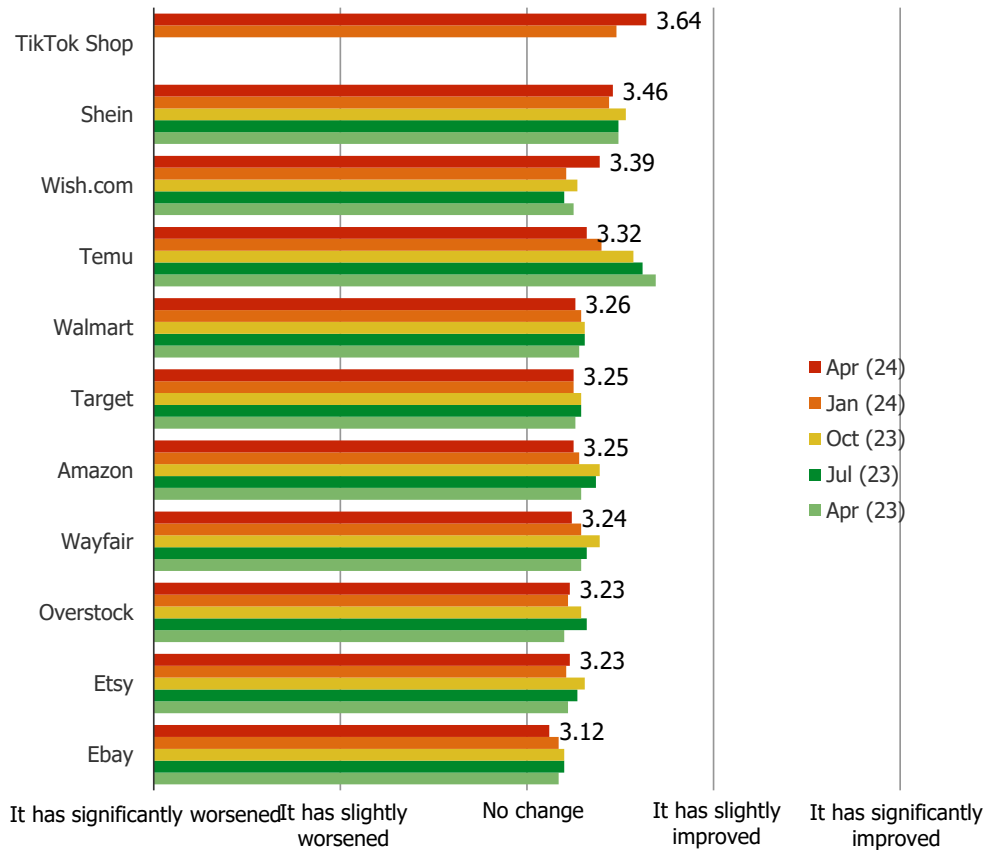
HOW MUCH TRUST DO YOU HAVE IN THE FOLLOWING?

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

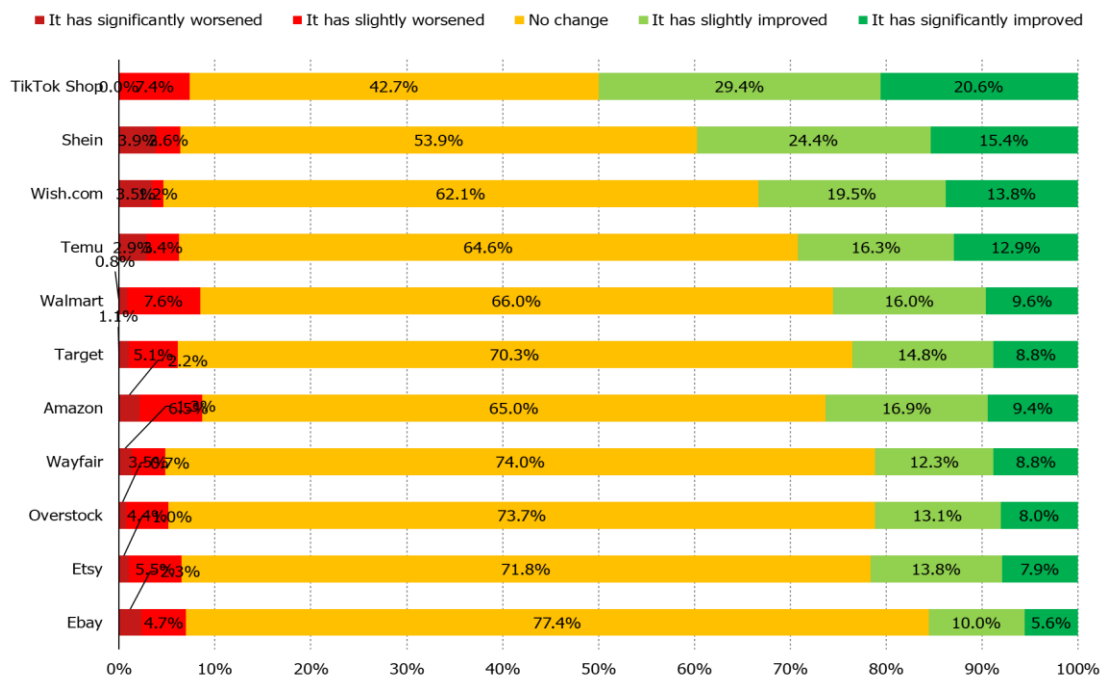


HAVE YOU NOTICED ANY CHANGES TO HOW GOOD THE SALES / PROMOTIONAL OFFERS ARE ON THESE PLATFORMS RECENTLY?

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

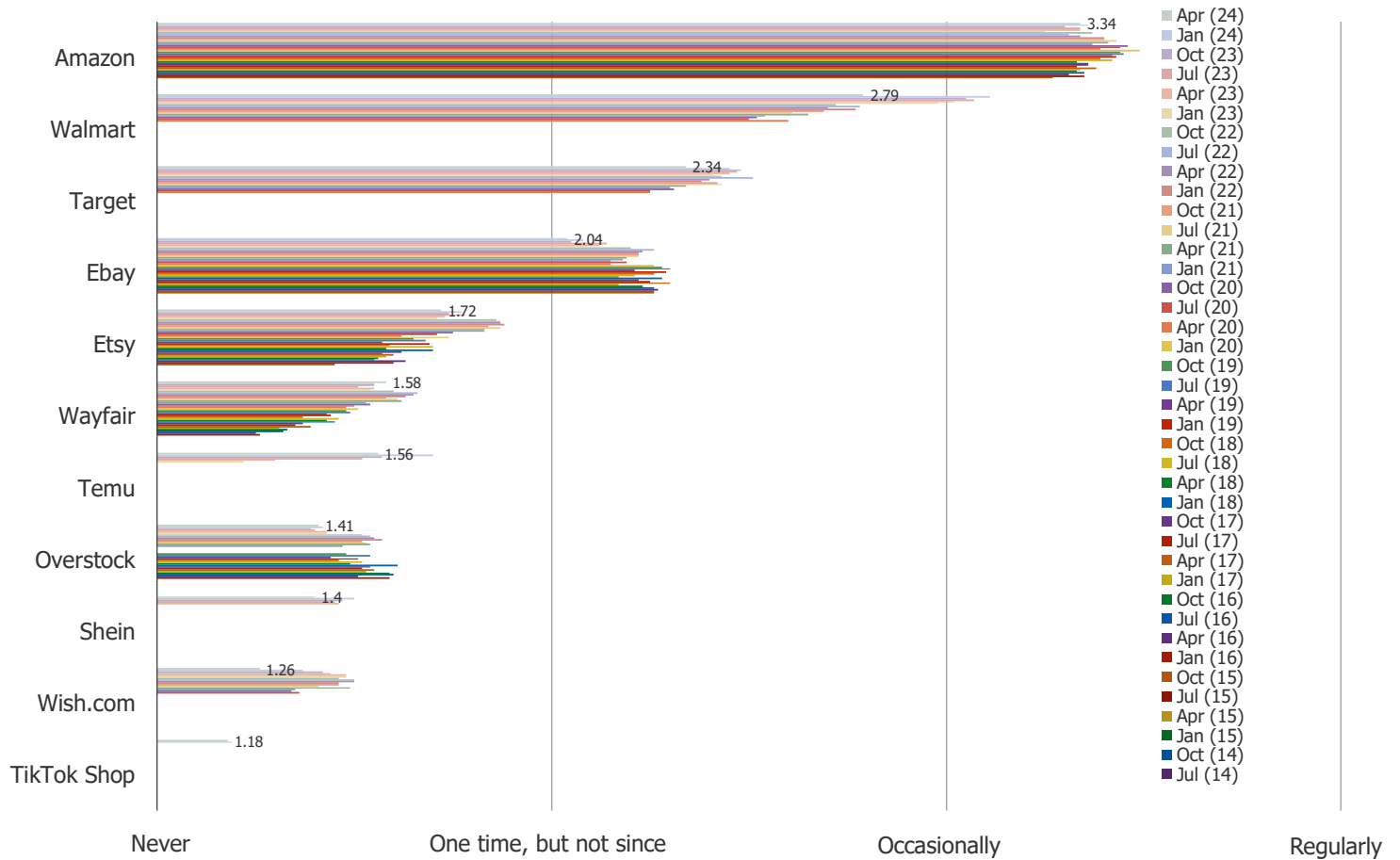


April 2024 Breakout



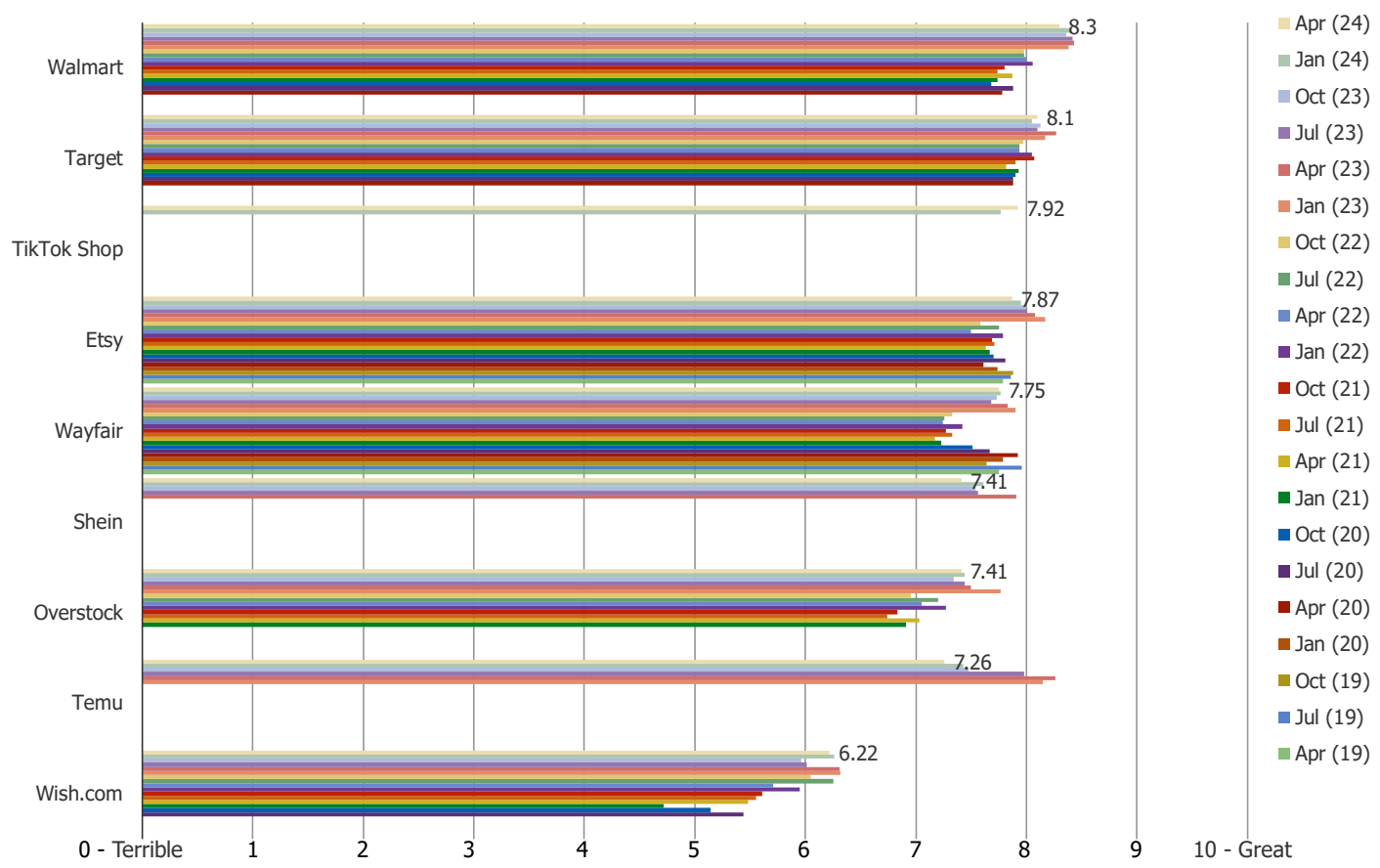
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH EACH OF THE FOLLOWING WEBSITES/APPS?

Posed to all respondents



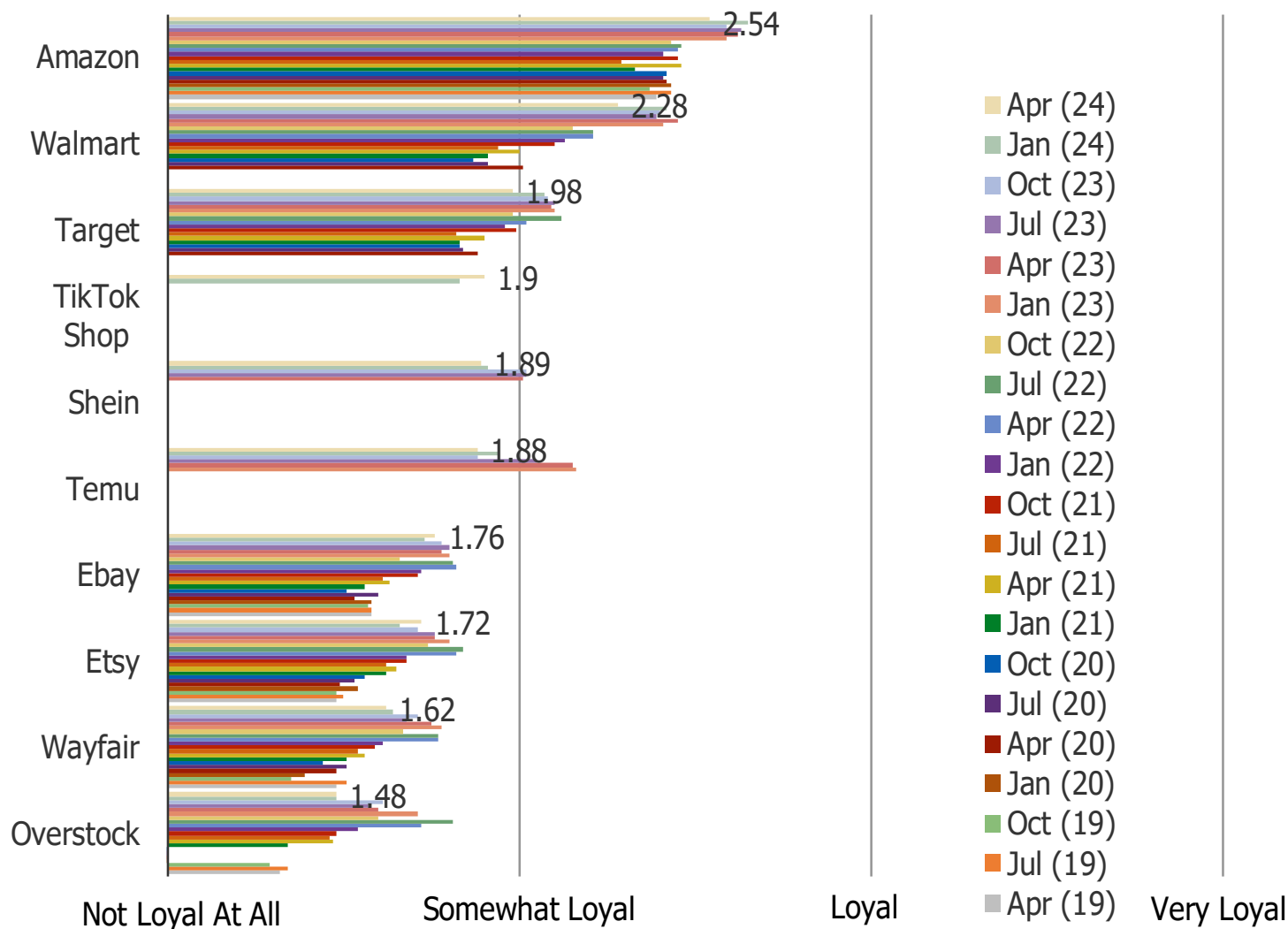
HOW DO YOU FIND THE SHIPPING EXPERIENCE WITH THIS APP/SITE?

Posed to users of each site/app



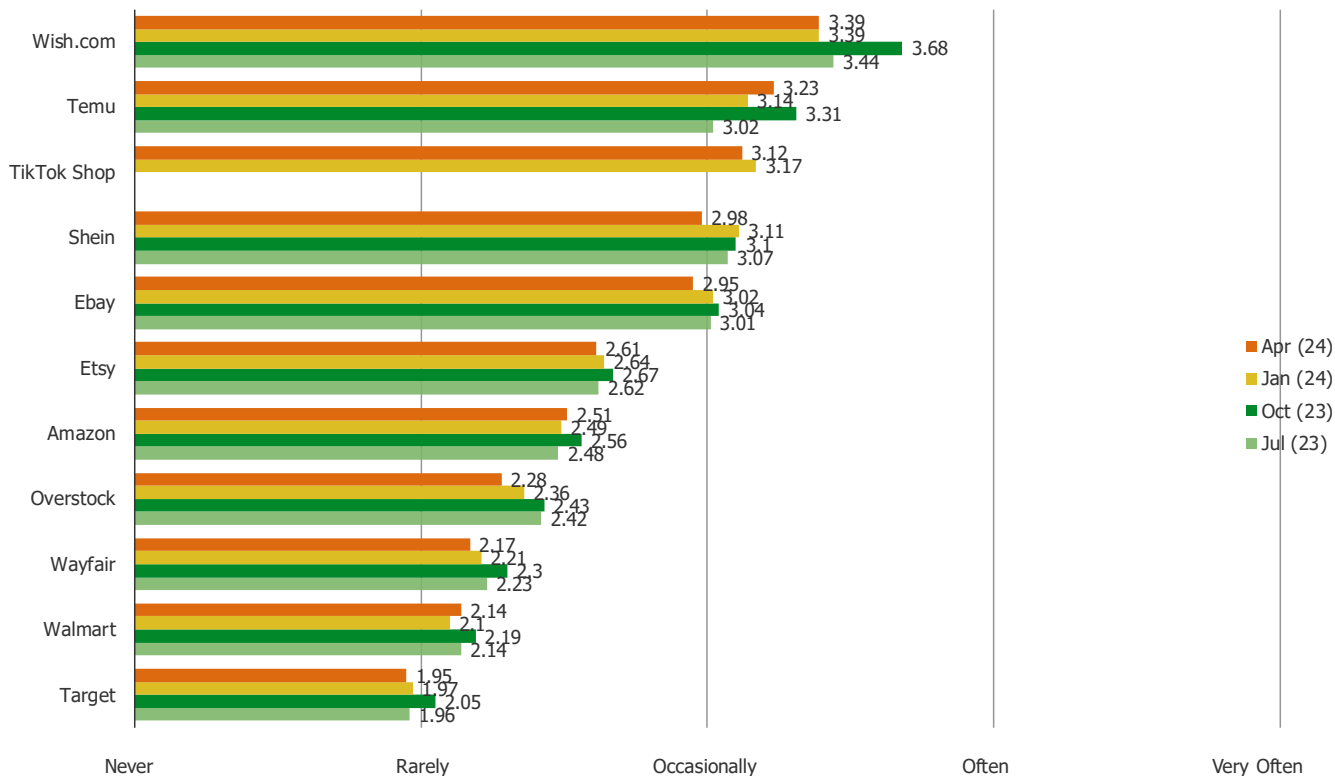
PLEASE RATE HOW LOYAL YOU ARE TO THIS APP/SITE FOR THE TYPES OF ITEMS YOU BUY FROM THEM:

Posed to users of each site/app

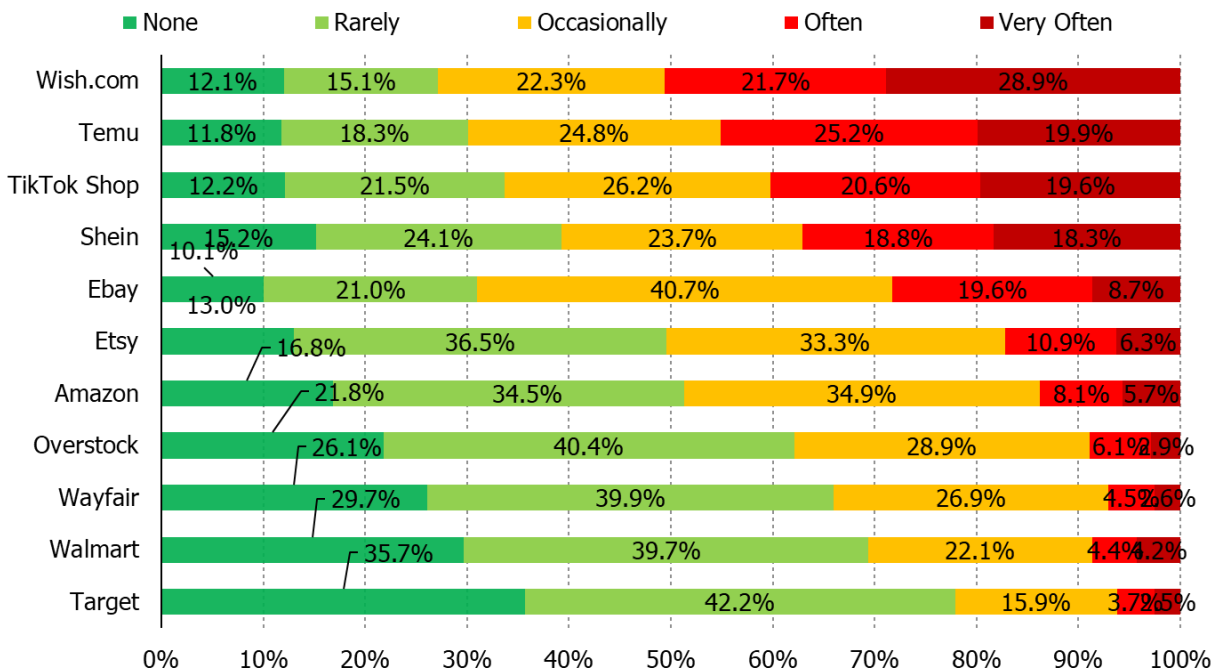


HOW OFTEN DO YOU THINK THERE ARE COUNTERFEIT / FAKE ITEMS BEING SOLD ON THIS PLATFORM?

Posed to all respondents who shop the below.

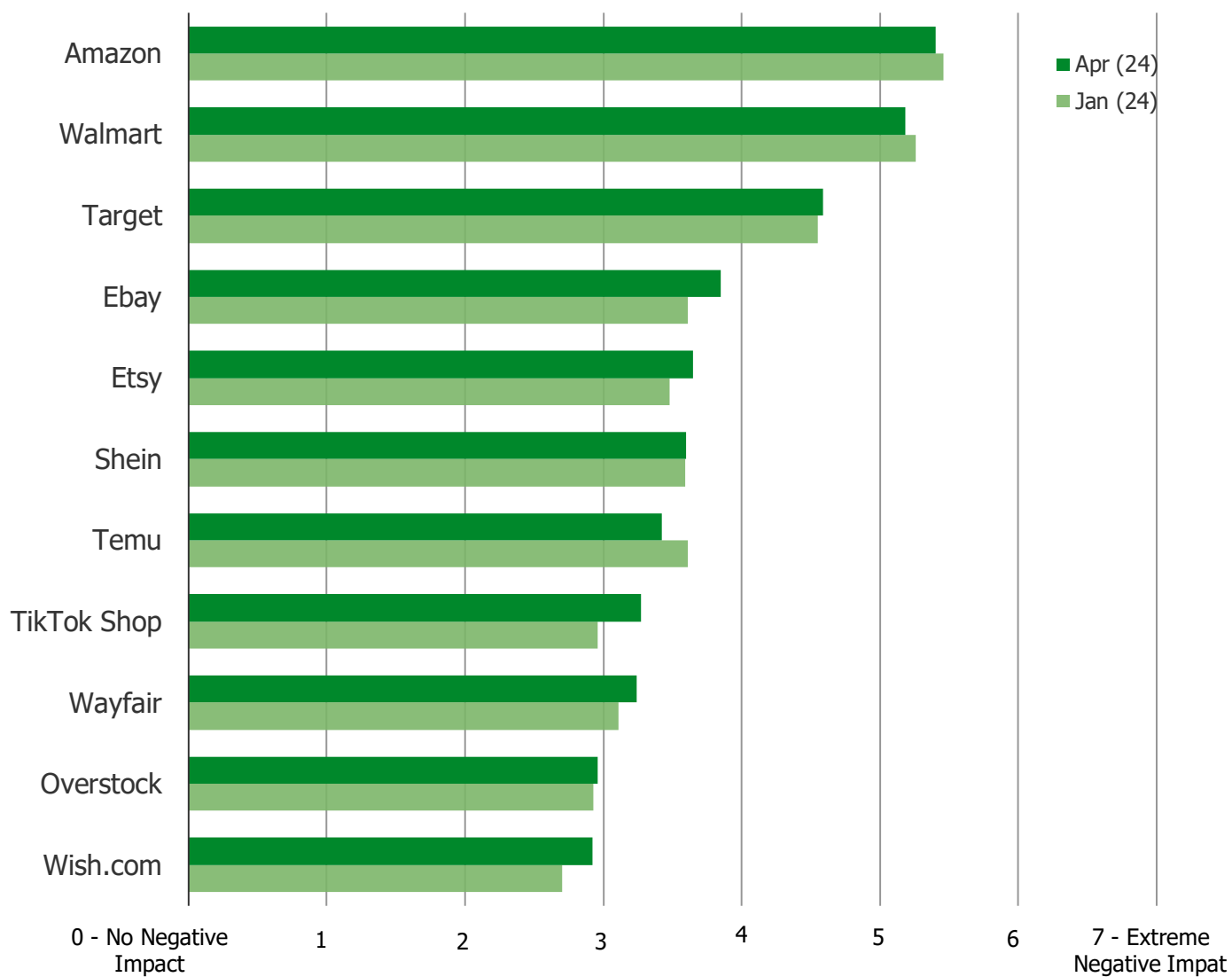


April 2024 Breakout



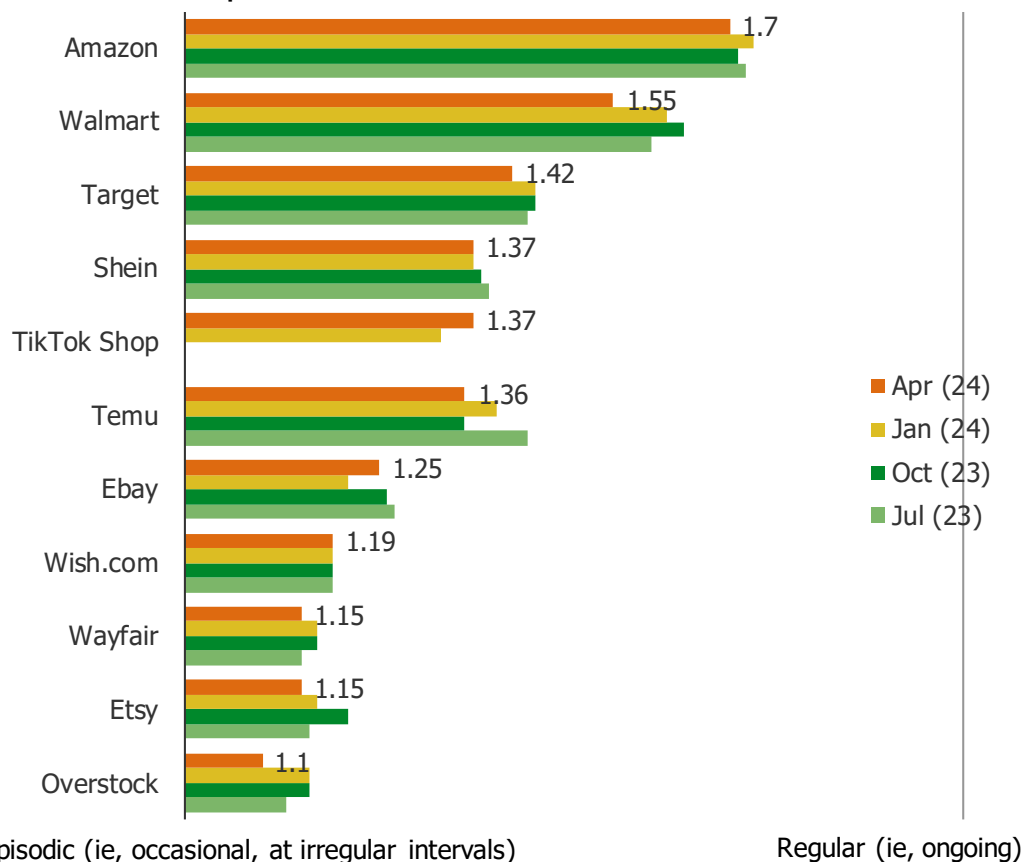
WOULD IT IMPACT YOUR LIFE IF THE FOLLOWING WENT OUT OF EXISTENCE TODAY?

Posed to all respondents who have shopped each of the following at least once...

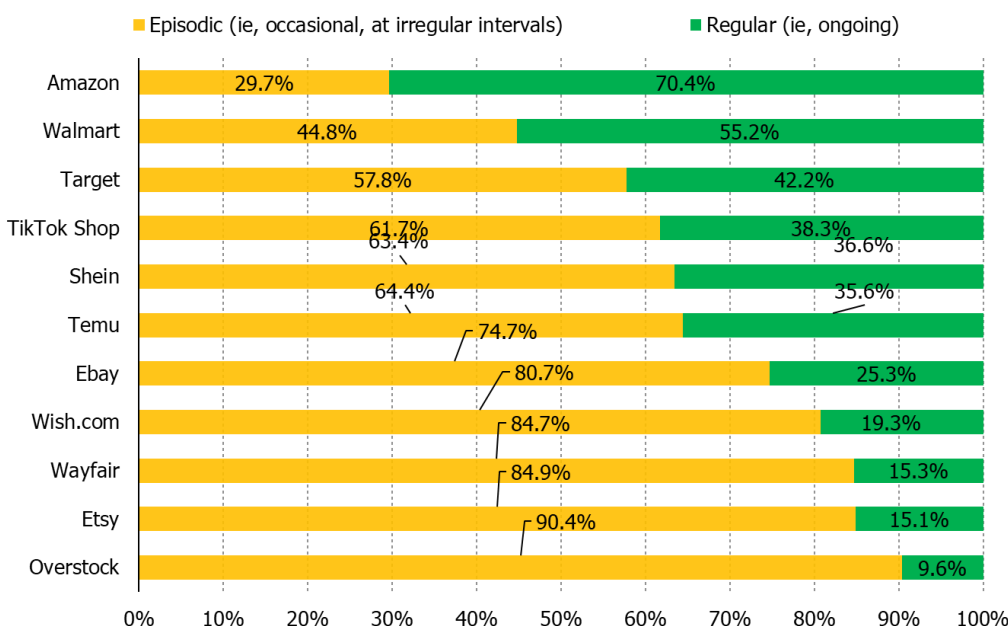


WOULD YOU DESCRIBE YOUR USAGE OF THIS PLATFORM AS REGULAR (IE, ONGOING) OR EPISODIC (OCCASIONAL, AT IRREGULAR INTERVALS)

Posed to all respondents who shop the below.

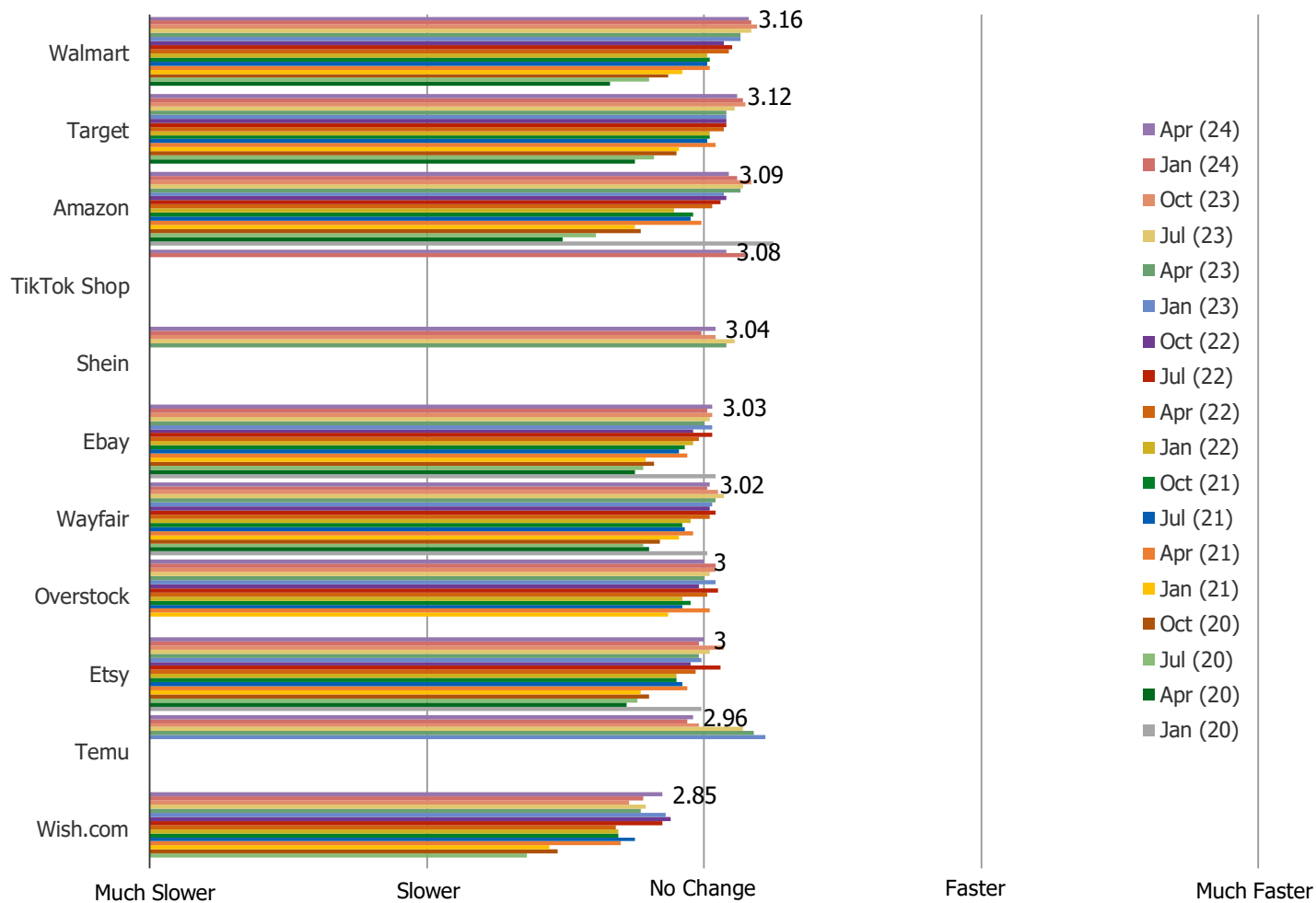


April 2024 Breakout



HAVE YOU NOTICED ANY CHANGES IN AVAILABLE SHIPPING TIMES WHEN USING THIS PLATFORM RECENTLY?

Posed to users of each site/app.

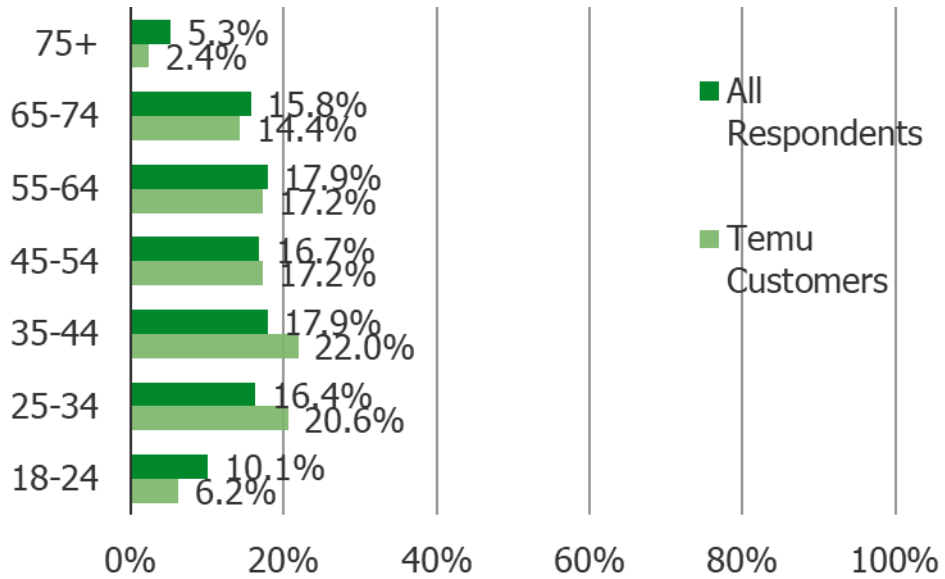


Temu

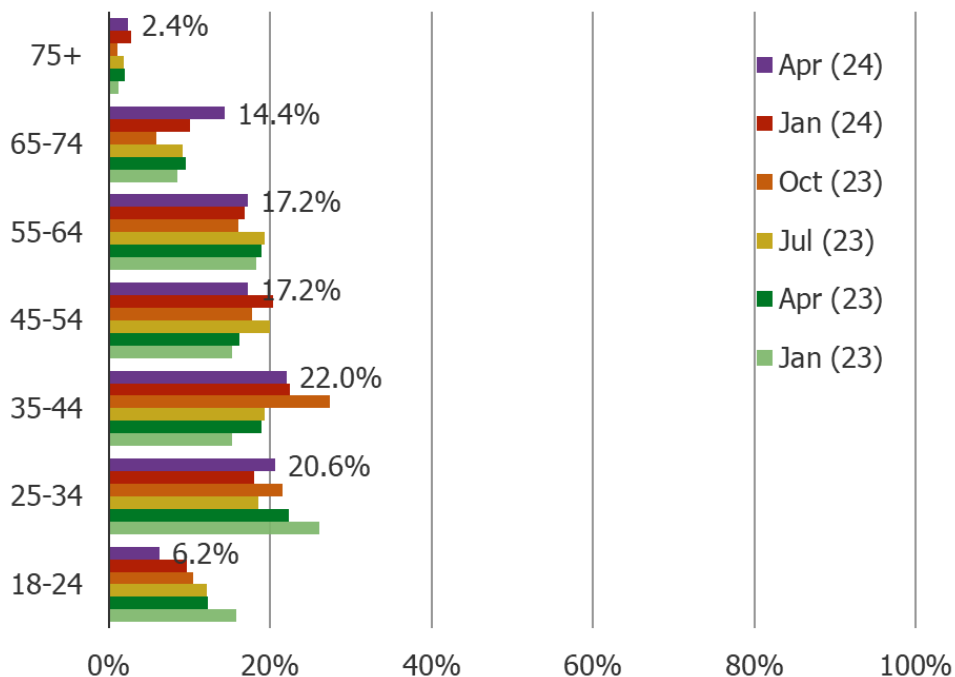
TEMU CUSTOMER DEMOGRAPHICS

TEMU CUSTOMERS - AGE

All respondents vs. respondents who shop **Temu regularly or occasionally**. (N= 209)

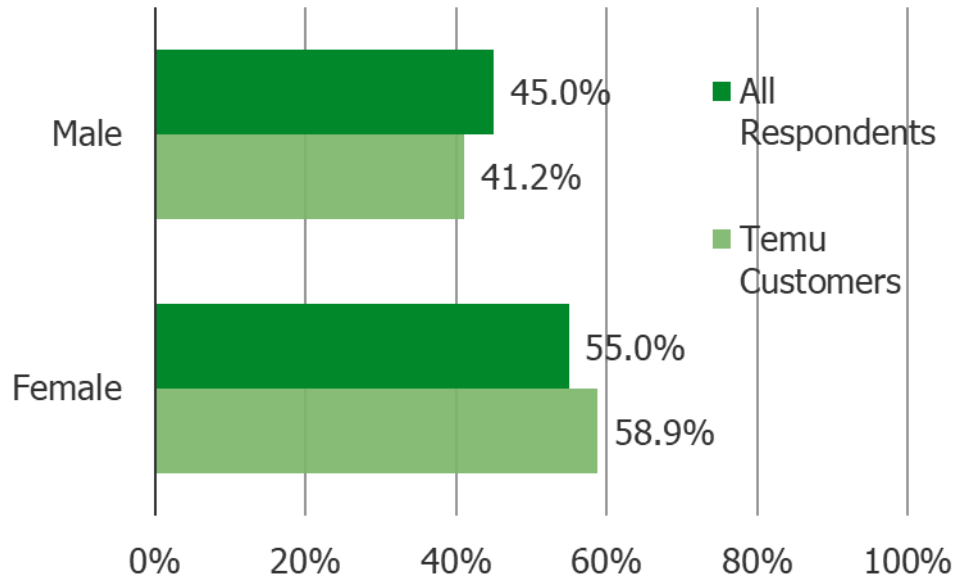


Time series (Regular or occasional Temu Customers)

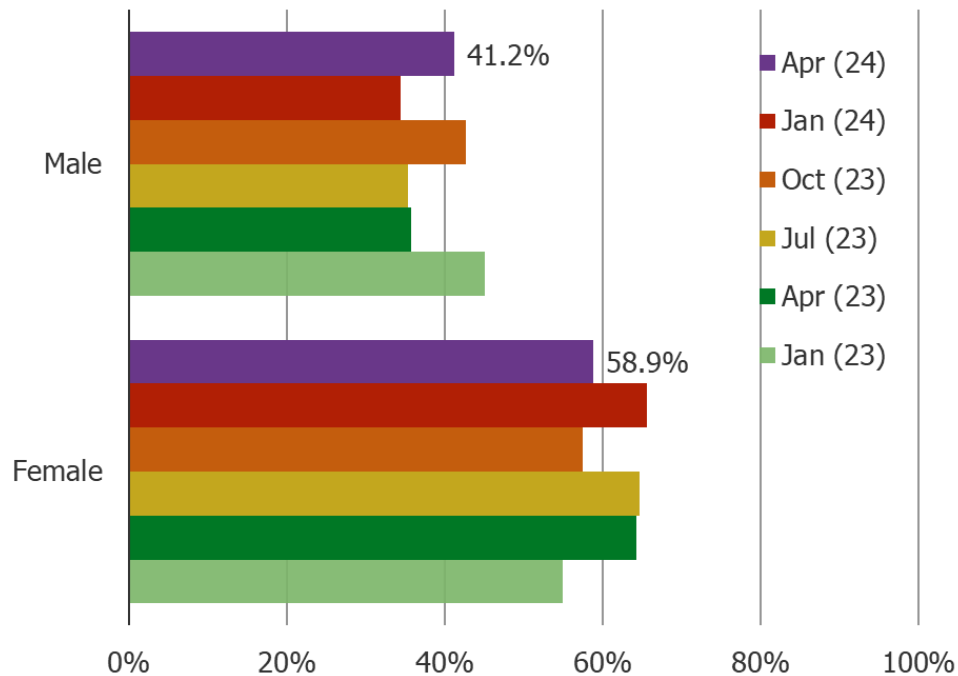


TEMU CUSTOMERS - GENDER

All respondents vs. respondents who shop **Temu regularly or occasionally**. (N= 209)

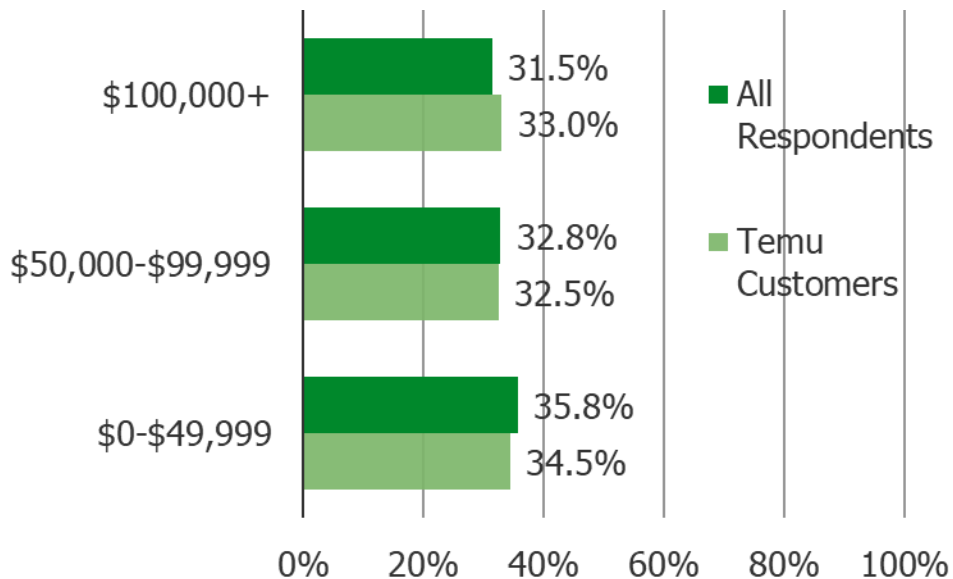


Time series (Regular or occasional Temu Customers)

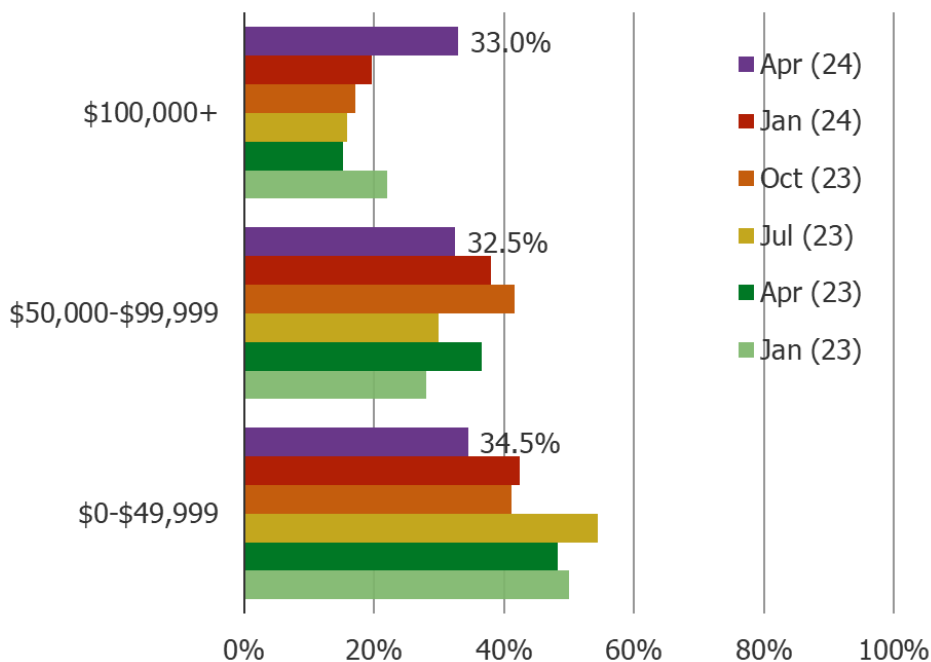


TEMU CUSTOMERS - INCOME

All respondents vs. respondents who shop **Temu regularly or occasionally**. (N= 209)



Time series (Regular or occasional Temu Customers)

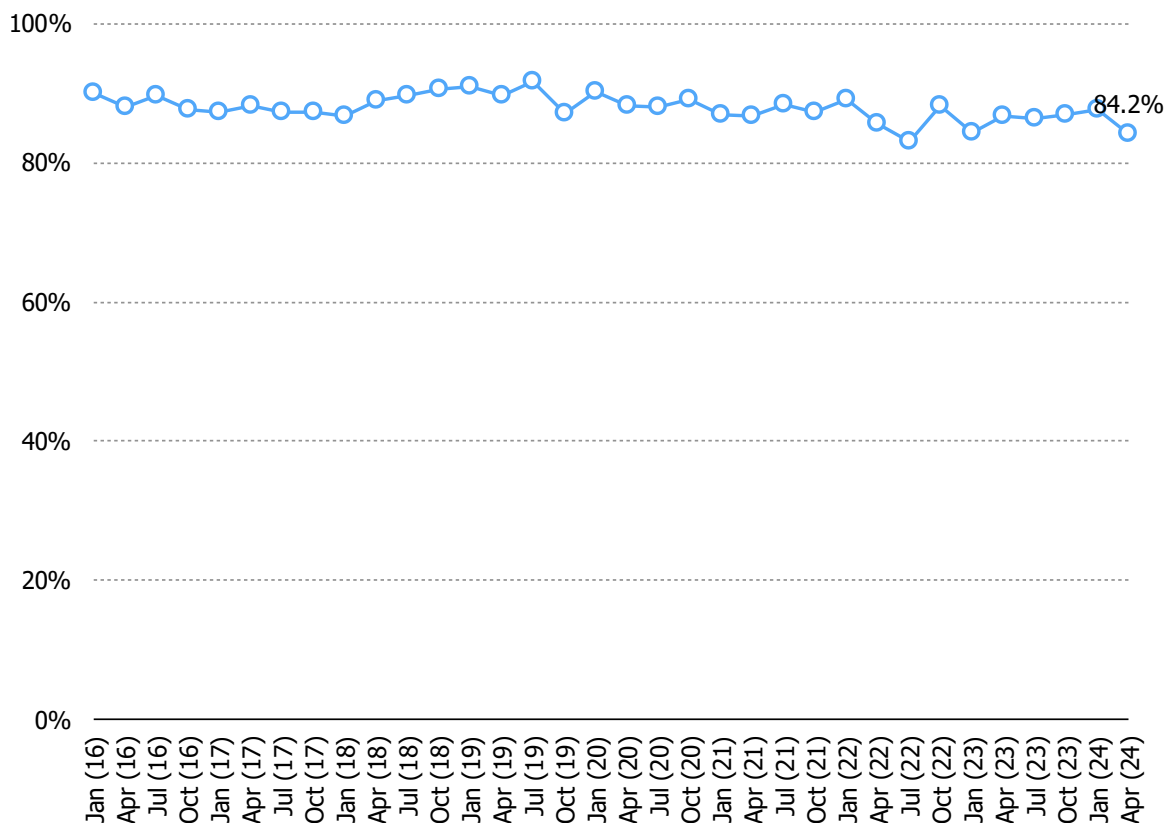


Temu

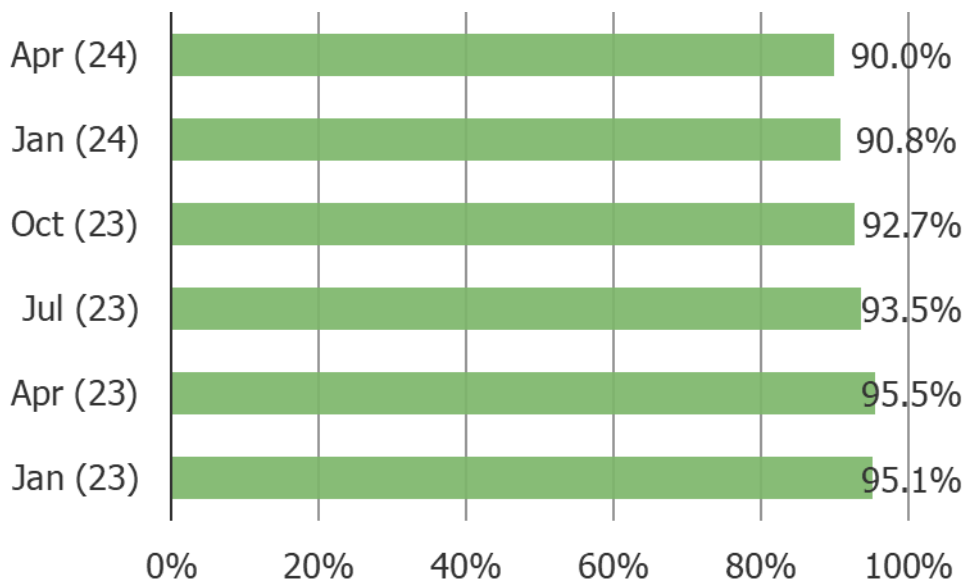
APPENDIX – AMZN <> TEMU

DO YOU EVER USE OR VISIT AMAZON (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?

Posed to all respondents.

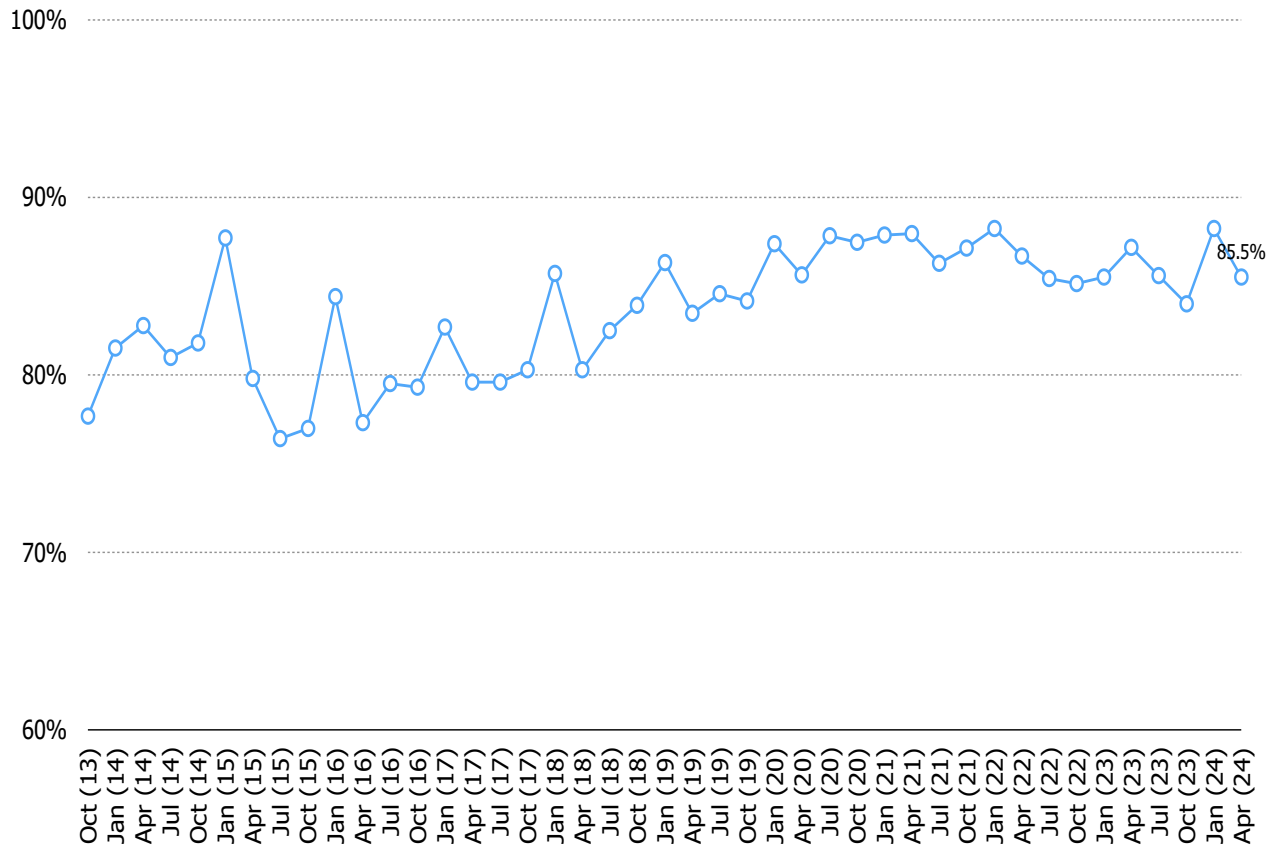


Posed to respondents who shop Temu regularly or occasionally...

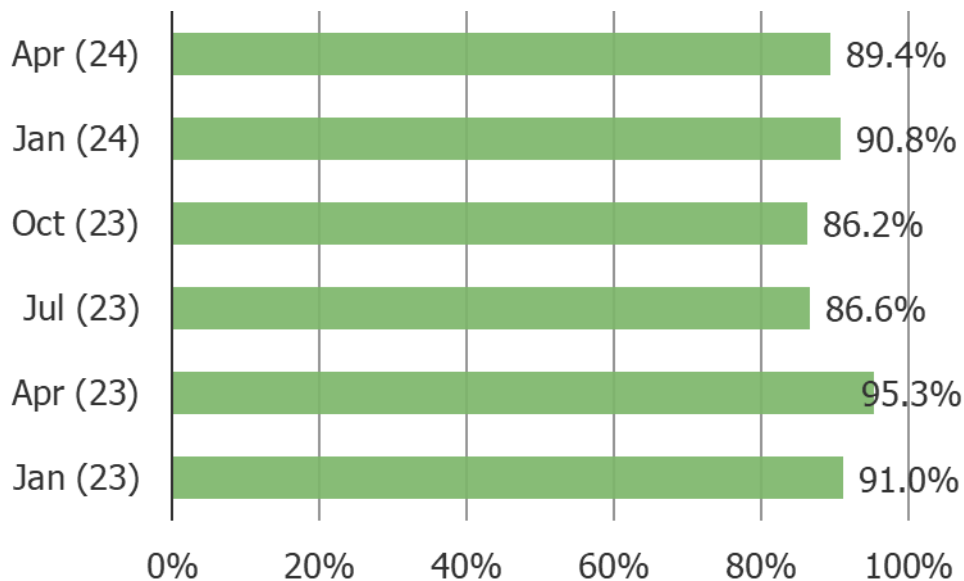


AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM AMAZON DURING THE PAST THREE MONTHS?

Posed to Amazon users

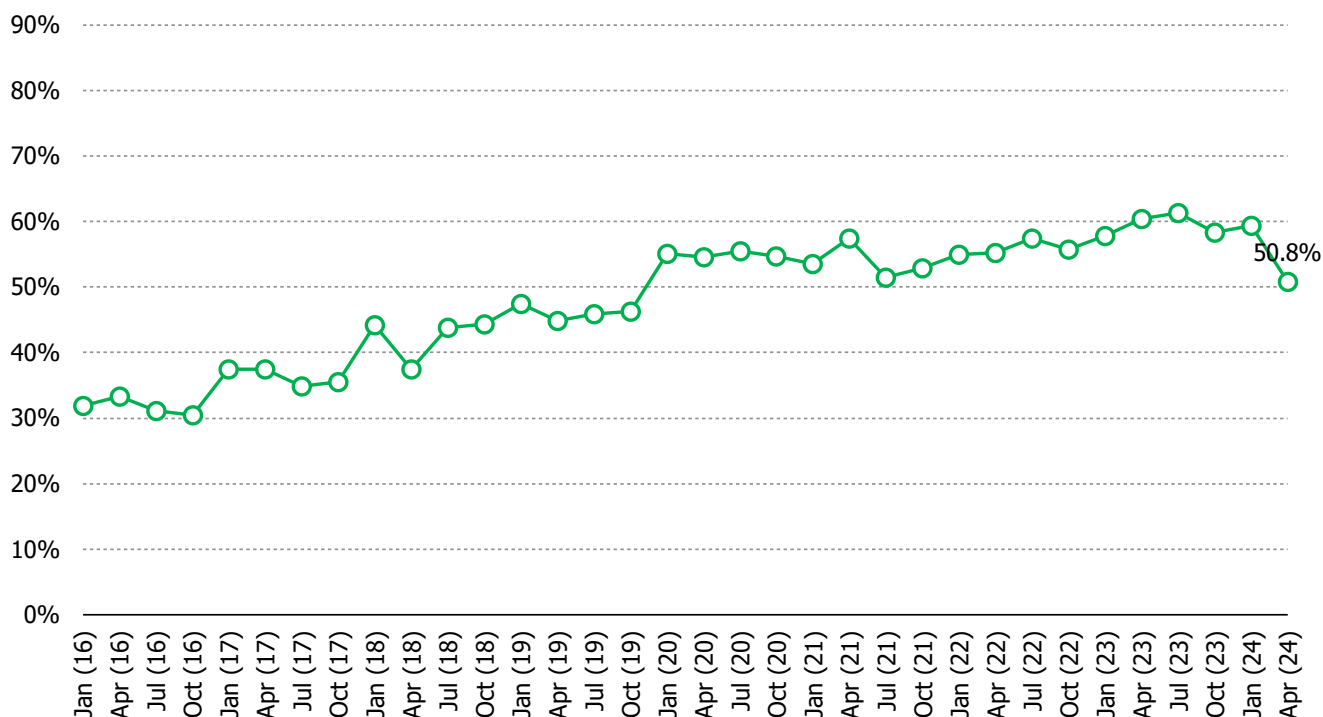


Posed to respondents who shop Temu regularly or occasionally and shop Amazon...

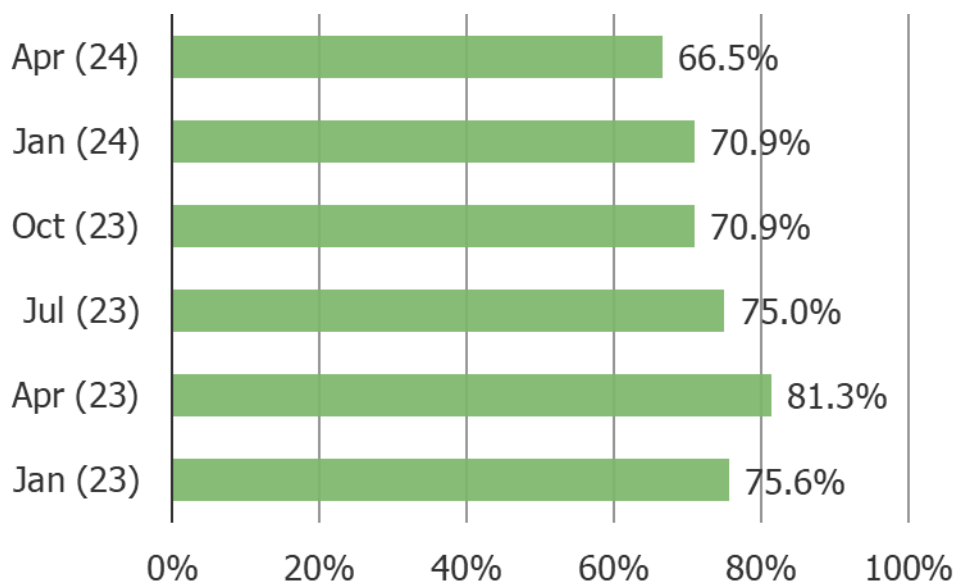


AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM THE AMAZON MOBILE APP IN THE PAST THREE MONTHS?

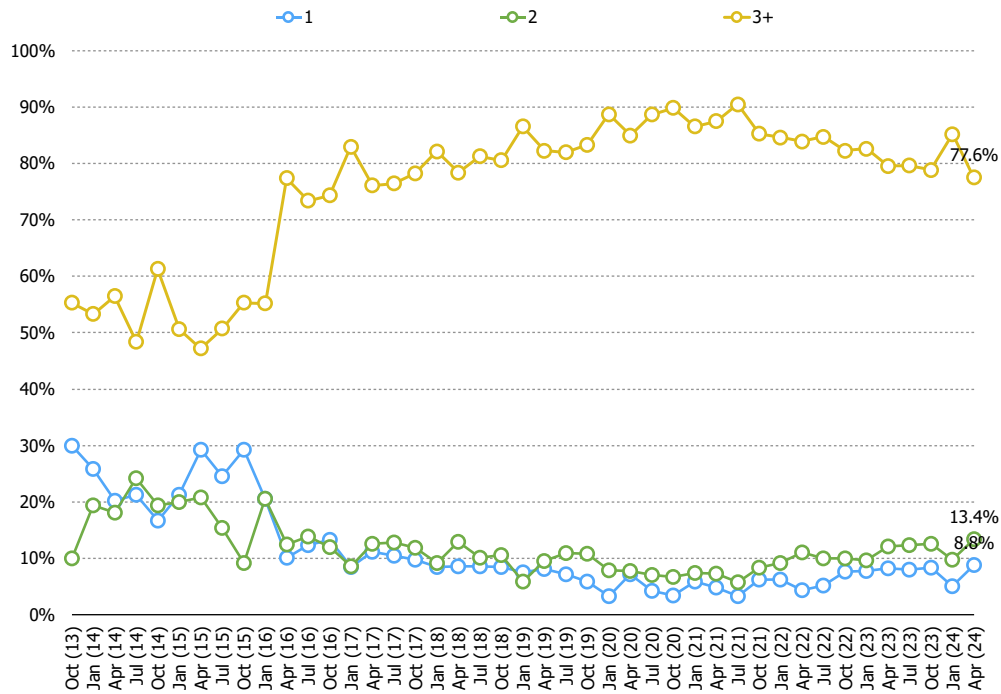
Posed to Amazon users



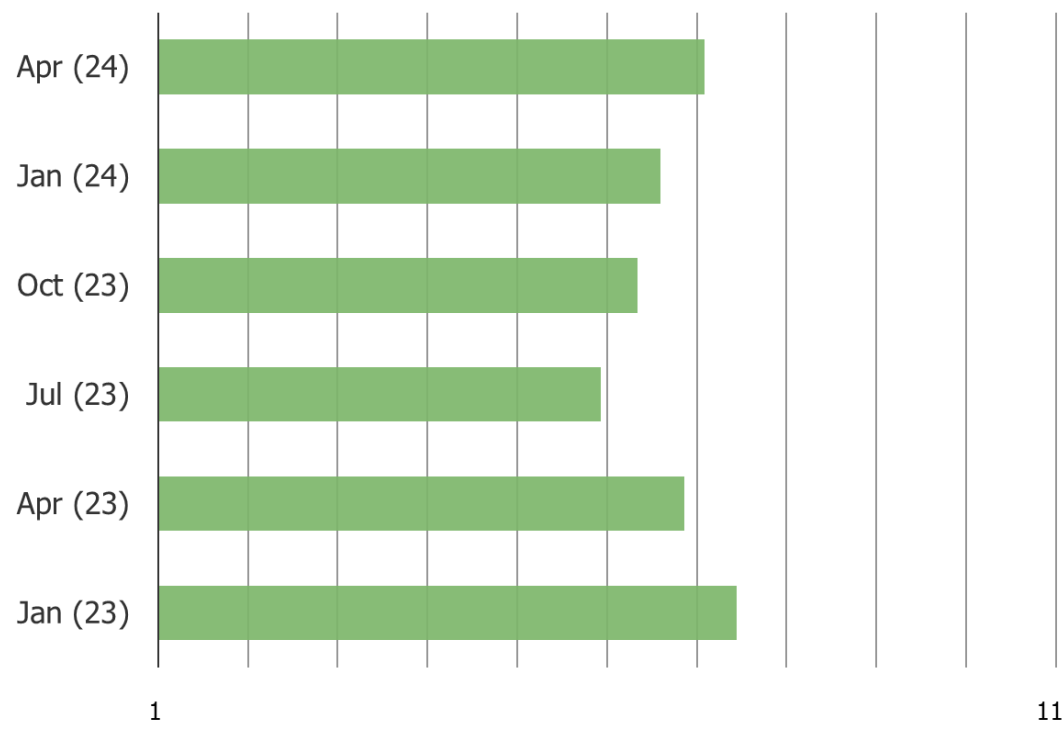
Posed to respondents who shop Temu regularly or occasionally and shop Amazon...



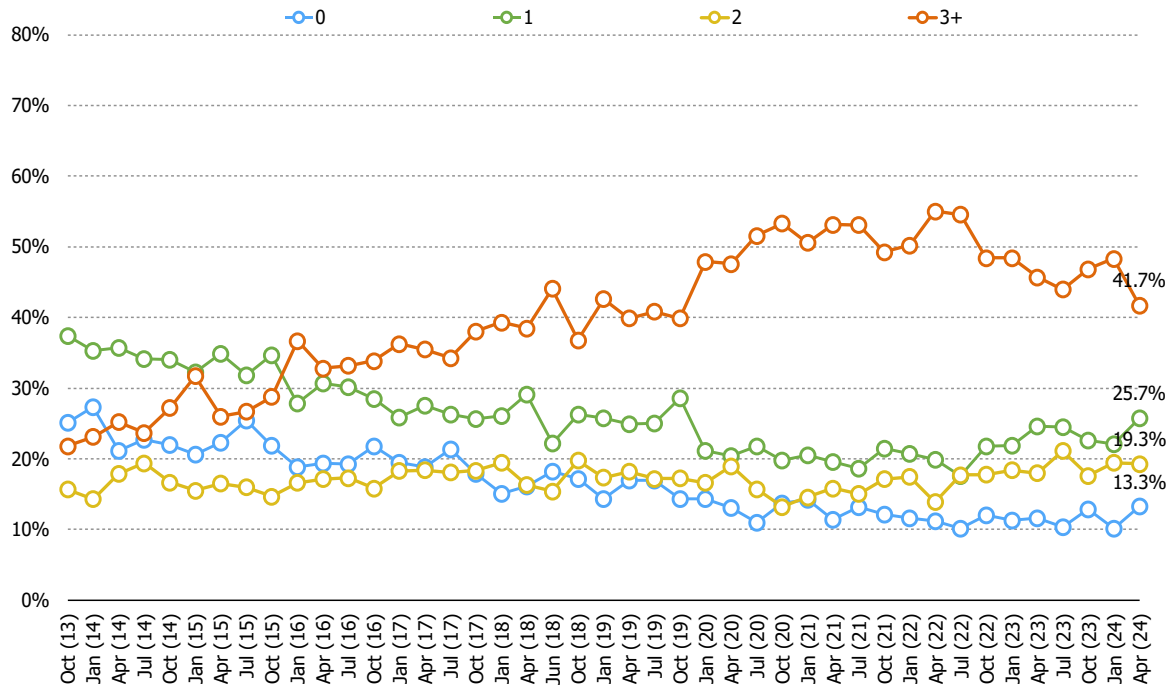
PURCHASED THROUGH AMAZON IN THE PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH AMAZON IN THE LAST THREE MONTHS?



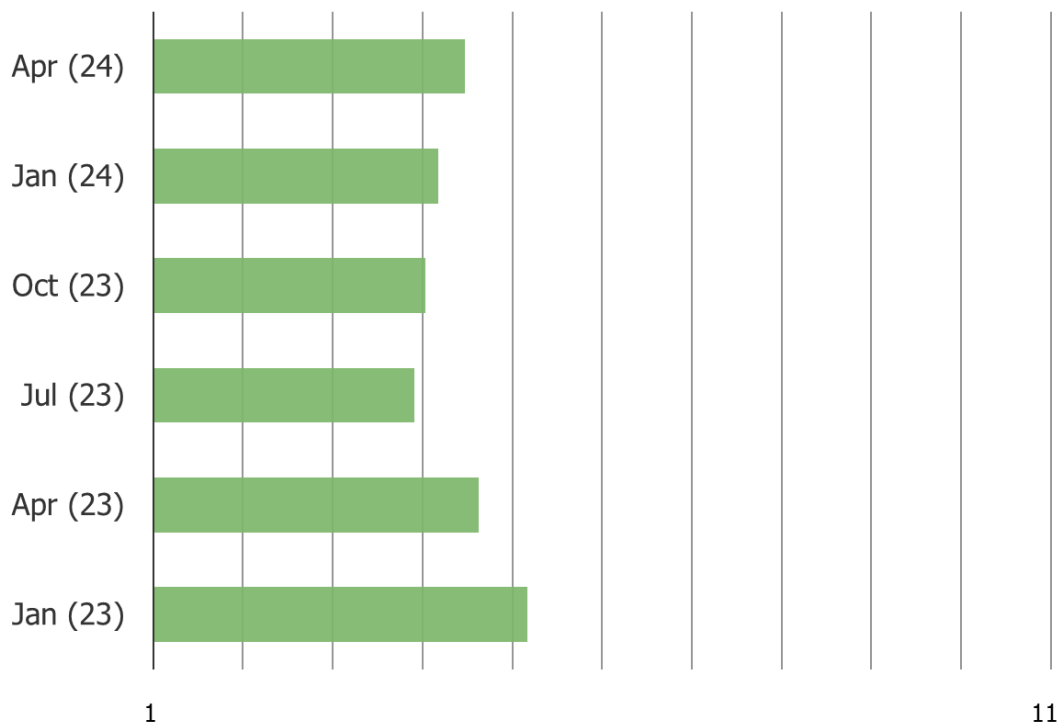
Posed to respondents who shop Temu regularly or occasionally and shop Amazon...



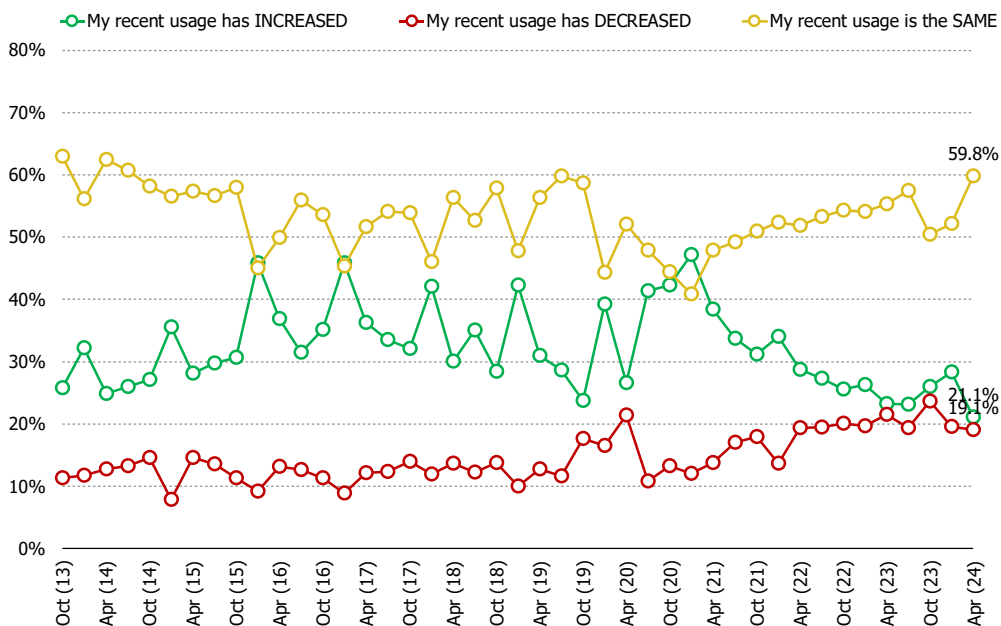
AMAZON USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH AMAZON A MONTH?



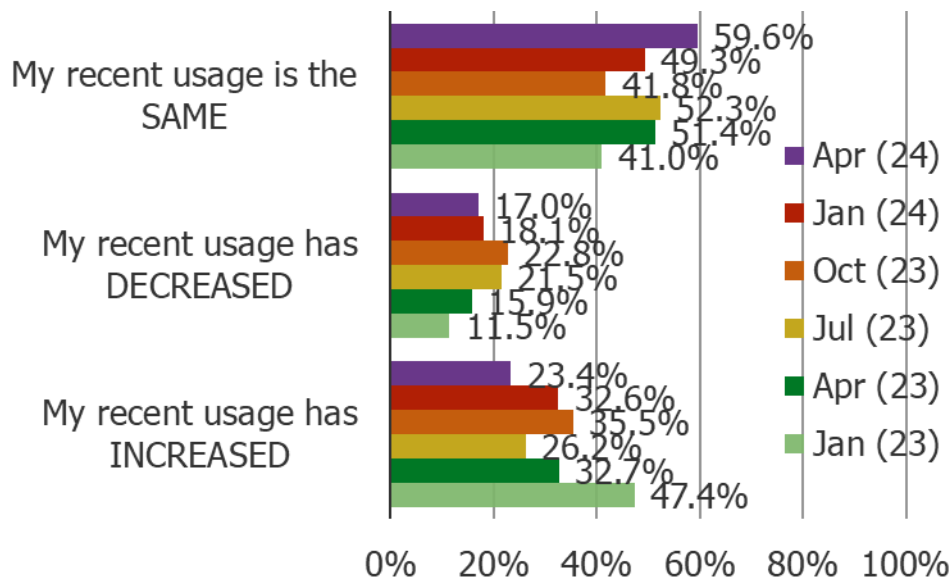
Posed to respondents who shop Temu regularly or occasionally and shop Amazon...



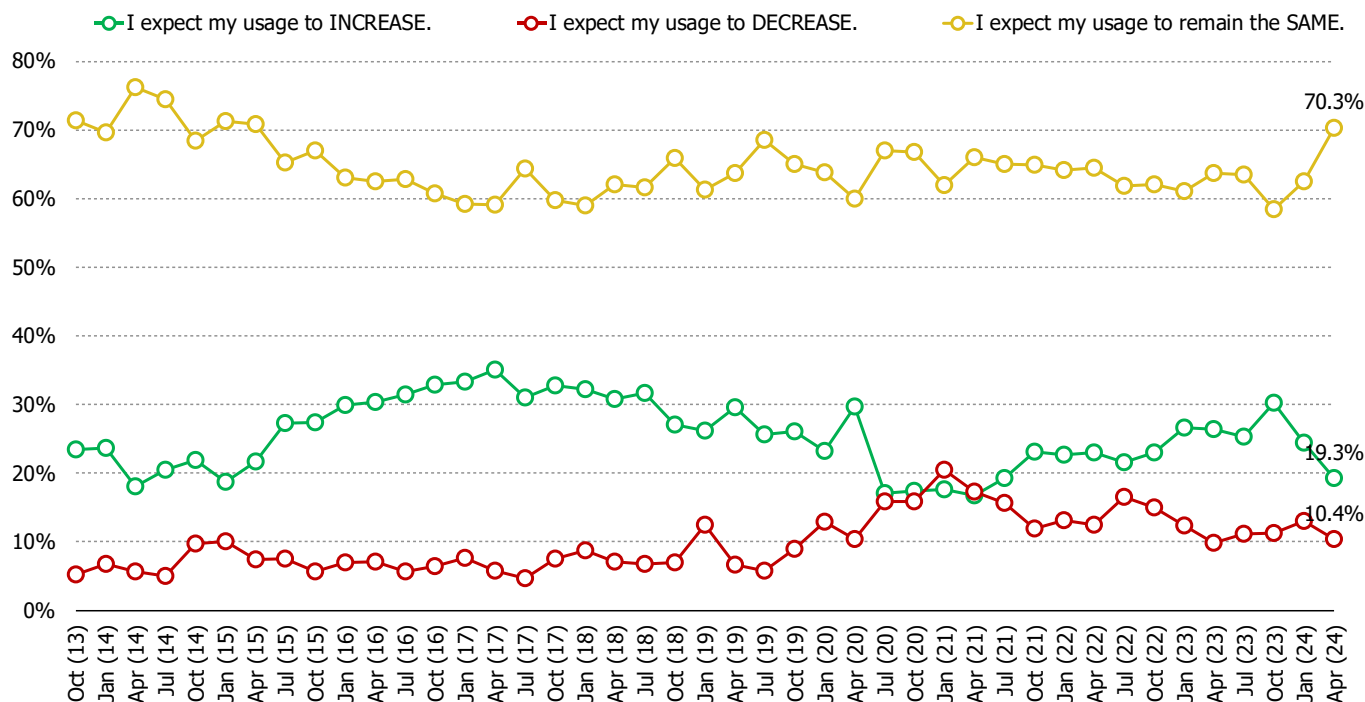
AMAZON USERS – RECENT USAGE



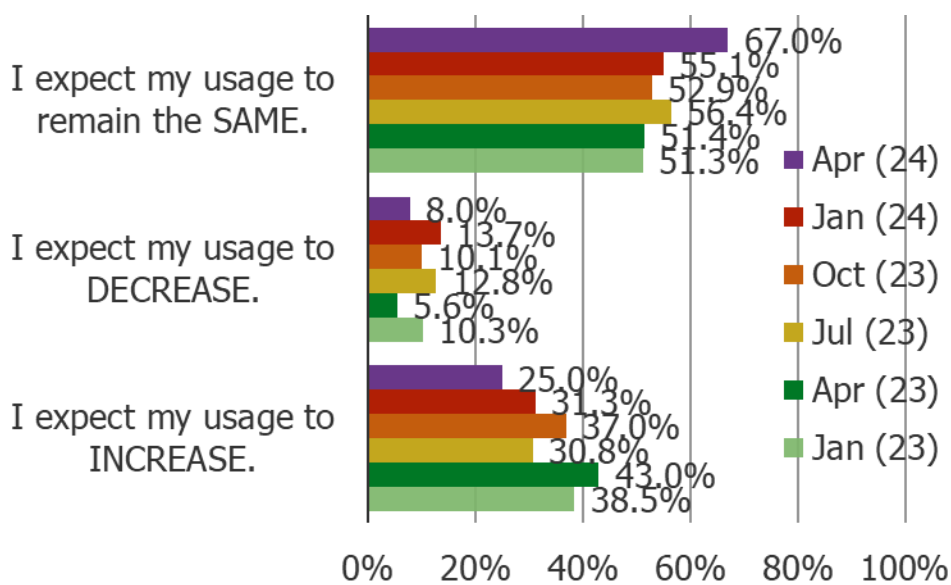
Posed to respondents who shop Temu regularly or occasionally and shop Amazon...



AMAZON USERS – EXPECTED USAGE

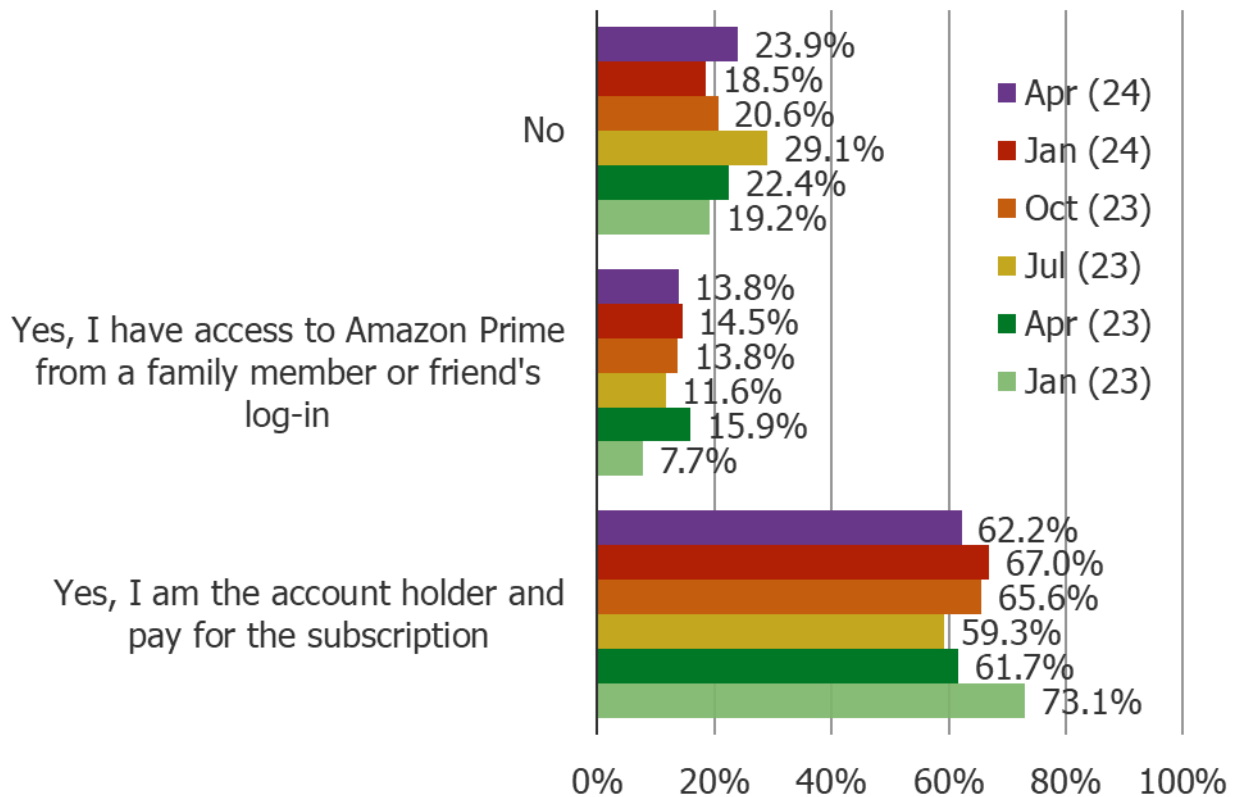


Posed to respondents who shop Temu regularly or occasionally and shop Amazon...



ARE YOU CURRENTLY A SUBSCRIBER OF AMAZON PRIME?

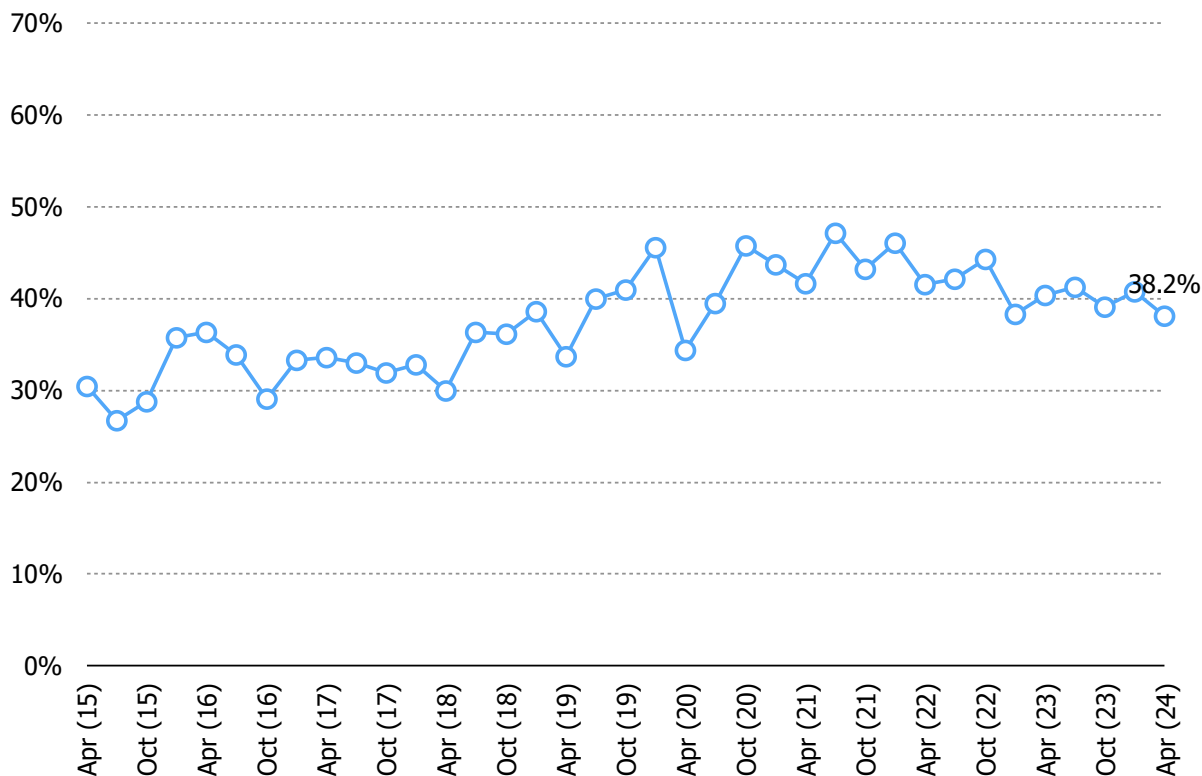
Posed to respondents who shop Temu regularly or occasionally who shop Amazon...



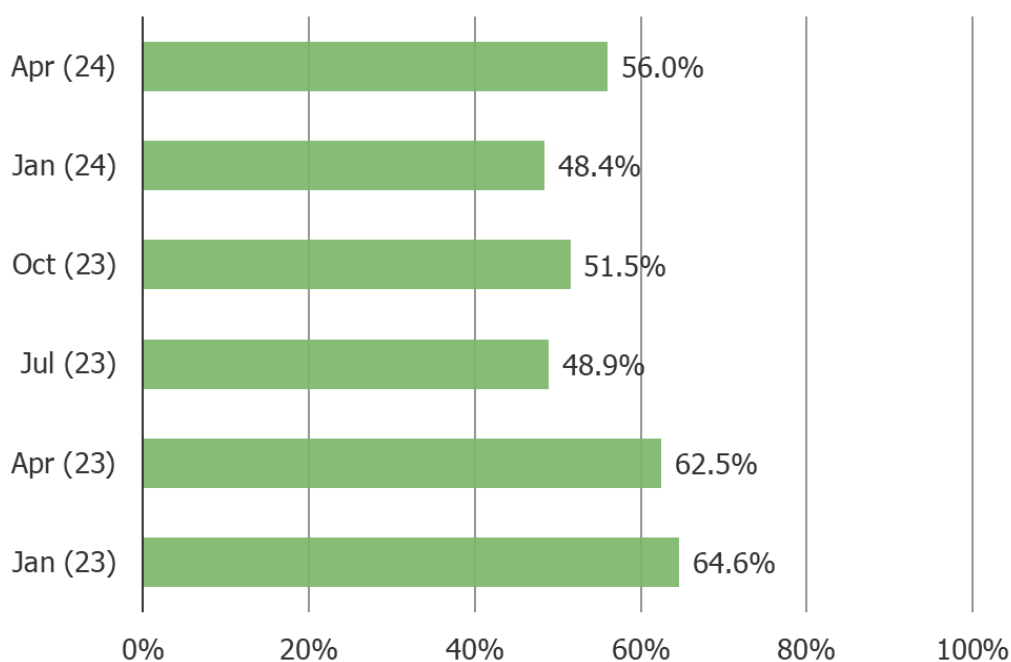
Temu

APPENDIX – ETSY <> TEMU

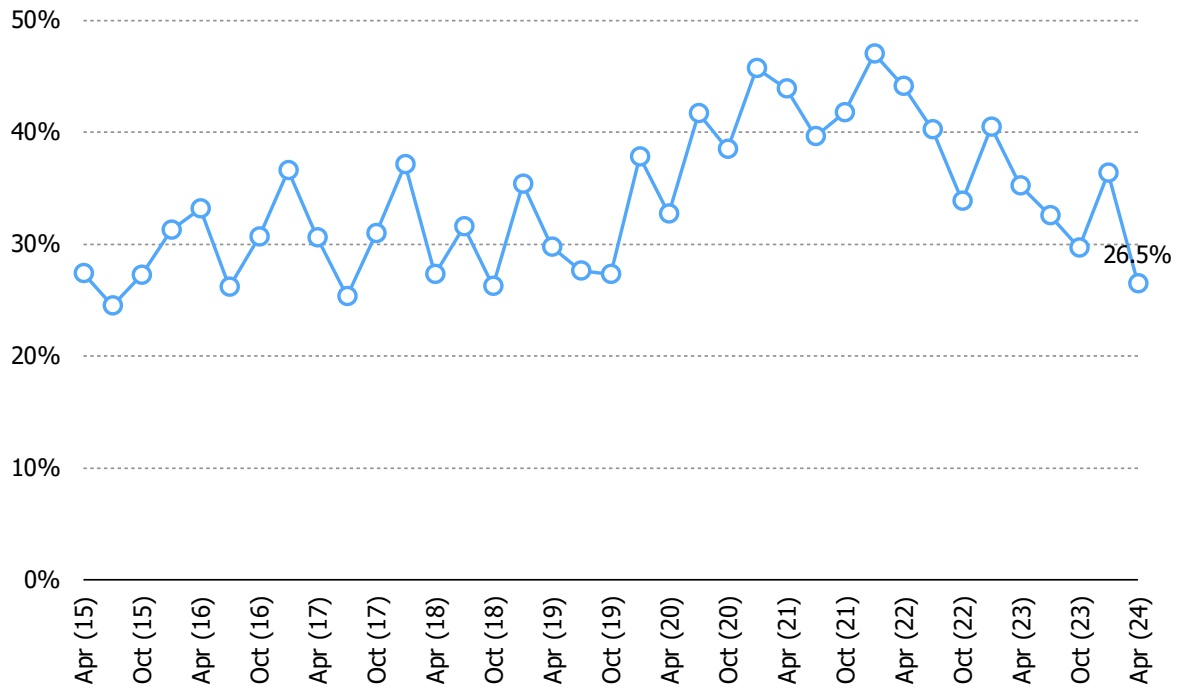
ALL RESPONDENTS – DO YOU EVER USE OR VISIT ETSY (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?



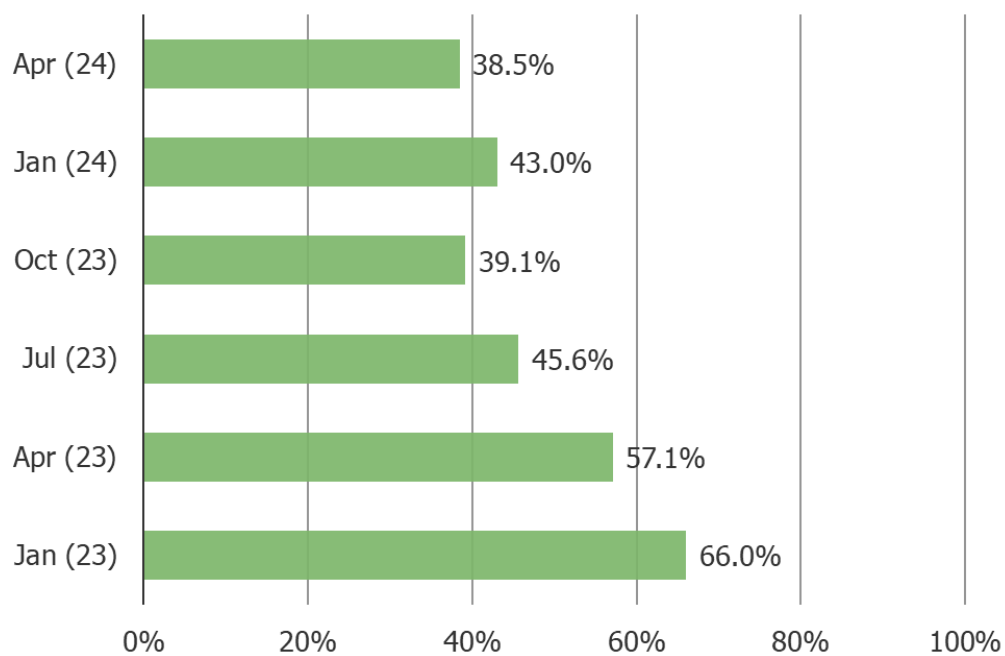
Posed to respondents who shop Temu regularly or occasionally...



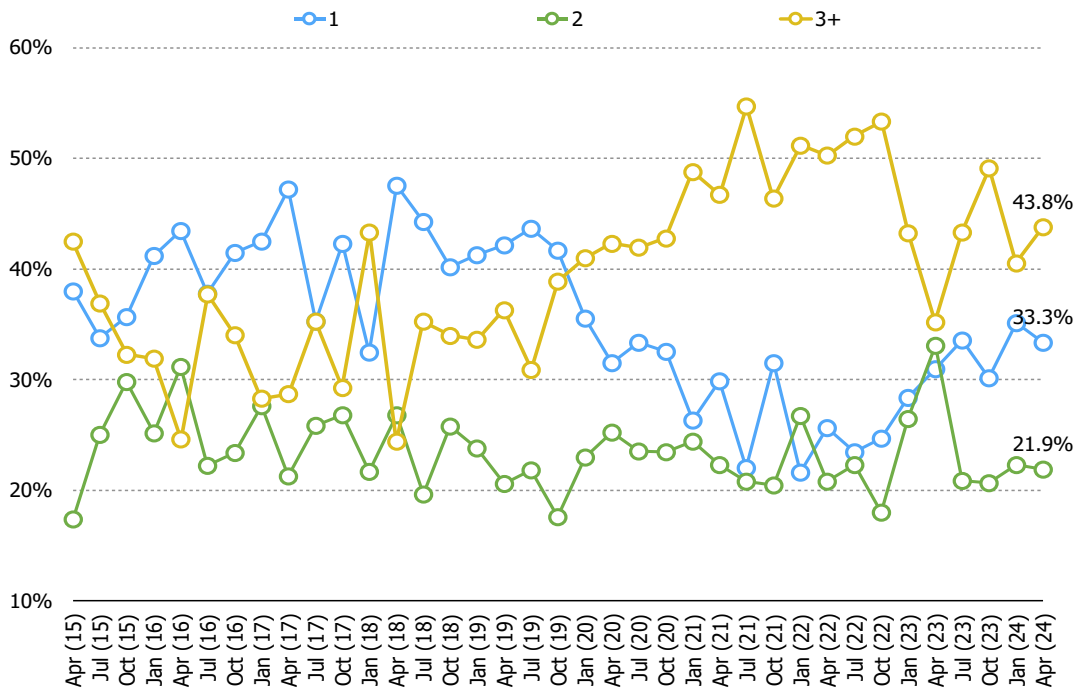
ETSY USERS – HAVE YOU PURCHASED AN ITEM FROM ETSY IN THE LAST THREE MONTHS?



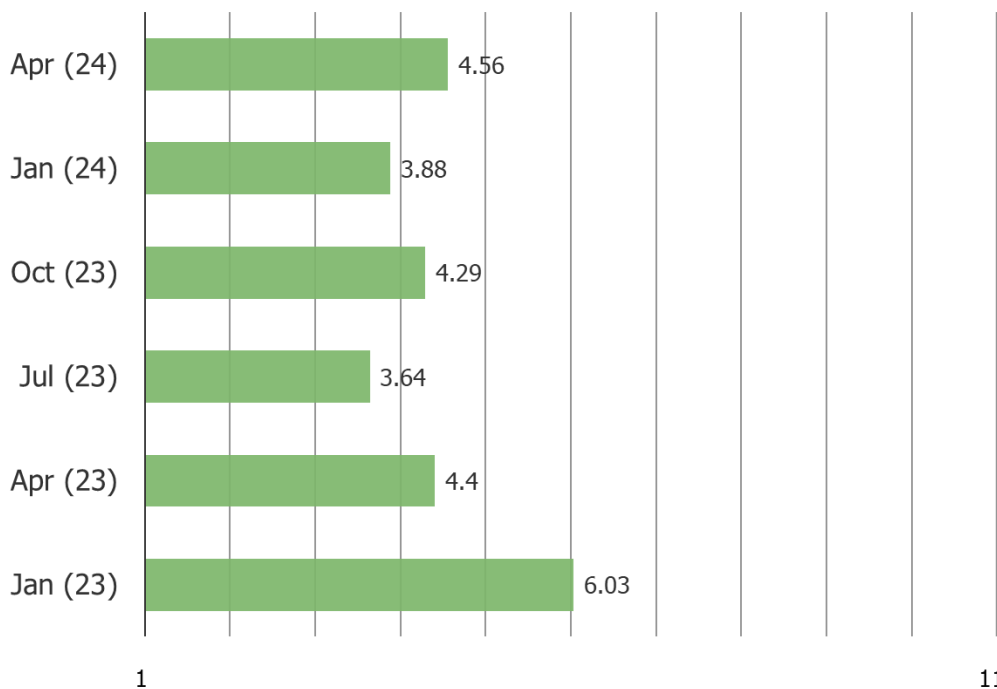
Posed to respondents who shop Temu regularly or occasionally and shop Etsy...



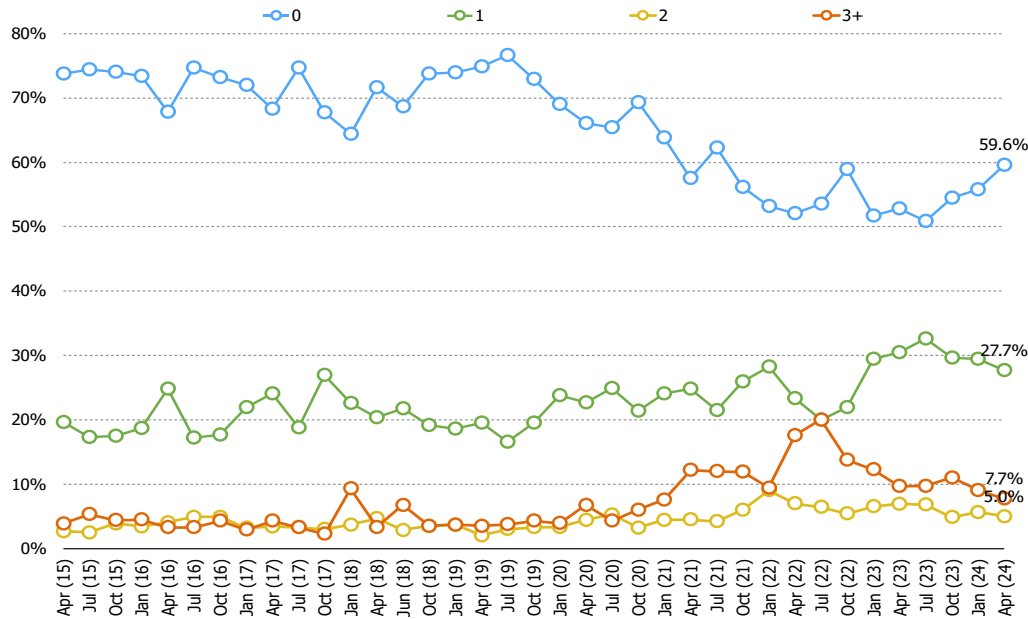
PURCHASED THROUGH ETSY IN PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH ETSY IN THE LAST THREE MONTHS?



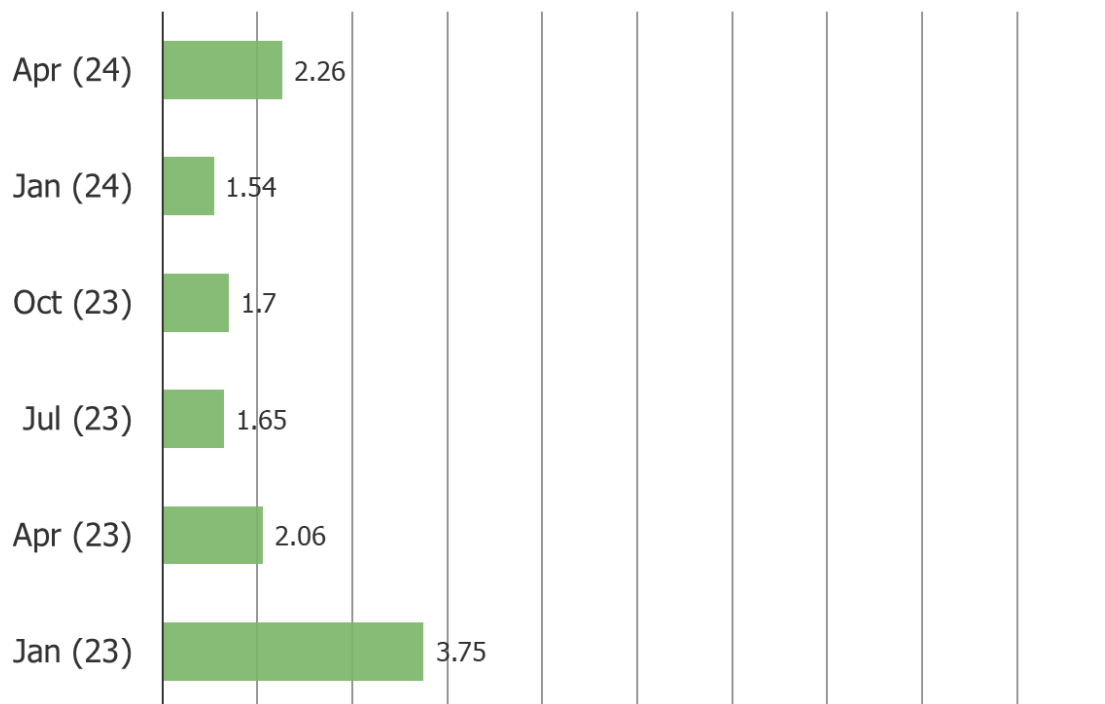
Posed to respondents who shop Temu regularly or occasionally and shop Etsy...



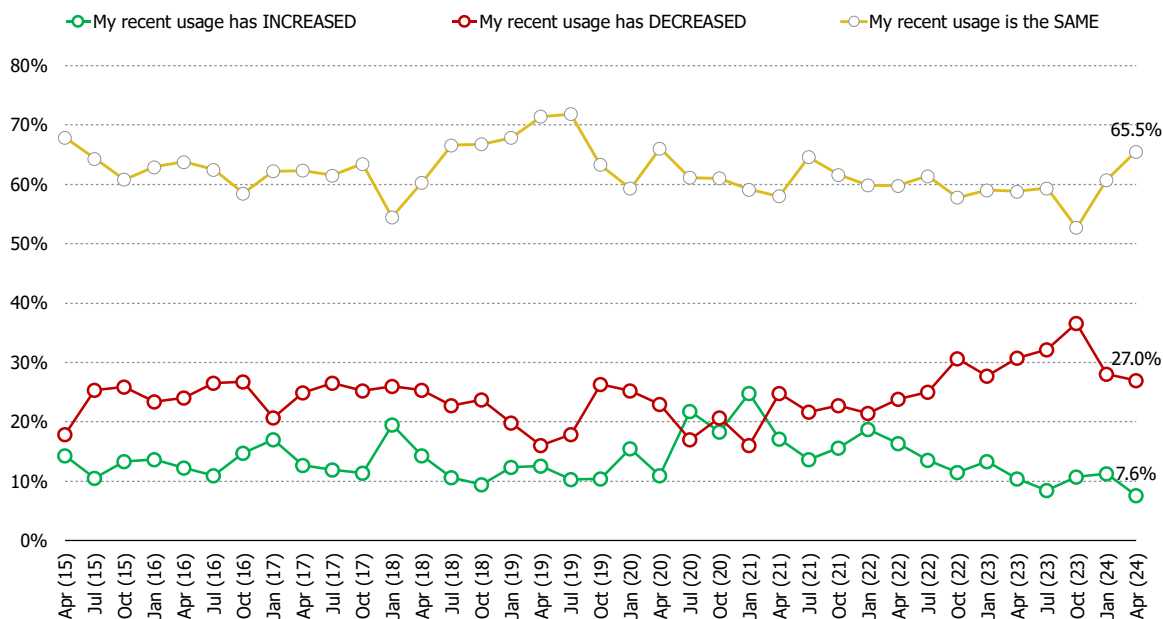
ETSY USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH ETSY PER MONTH



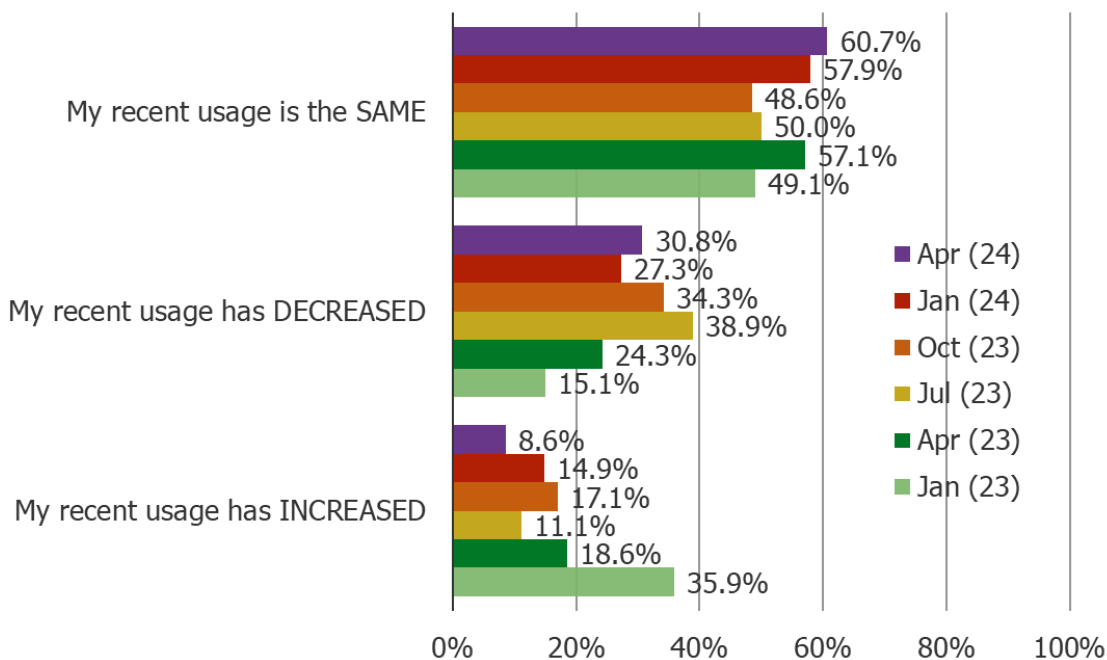
Posed to respondents who shop Temu regularly or occasionally and shop Etsy...



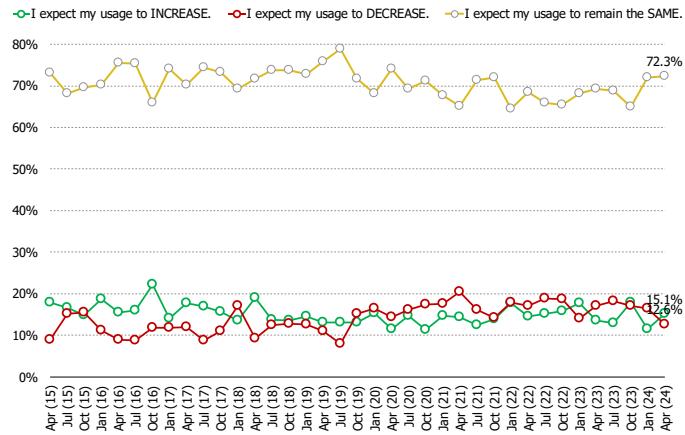
ETSY USERS – RECENT USAGE



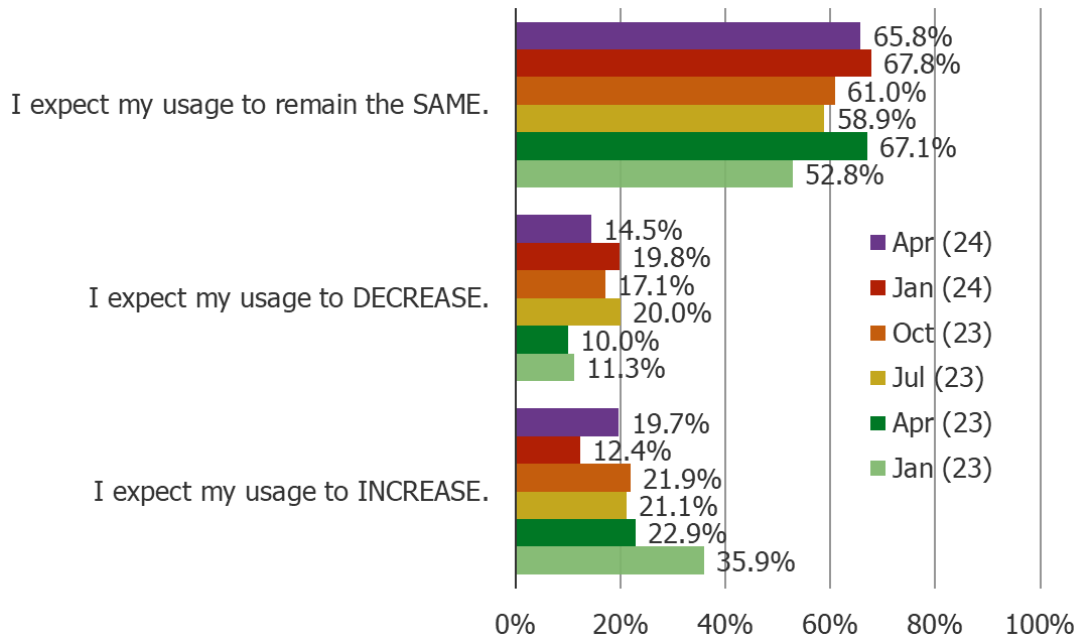
Posed to respondents who shop Temu regularly or occasionally and shop Etsy...



ETSY USERS – EXPECTED USAGE



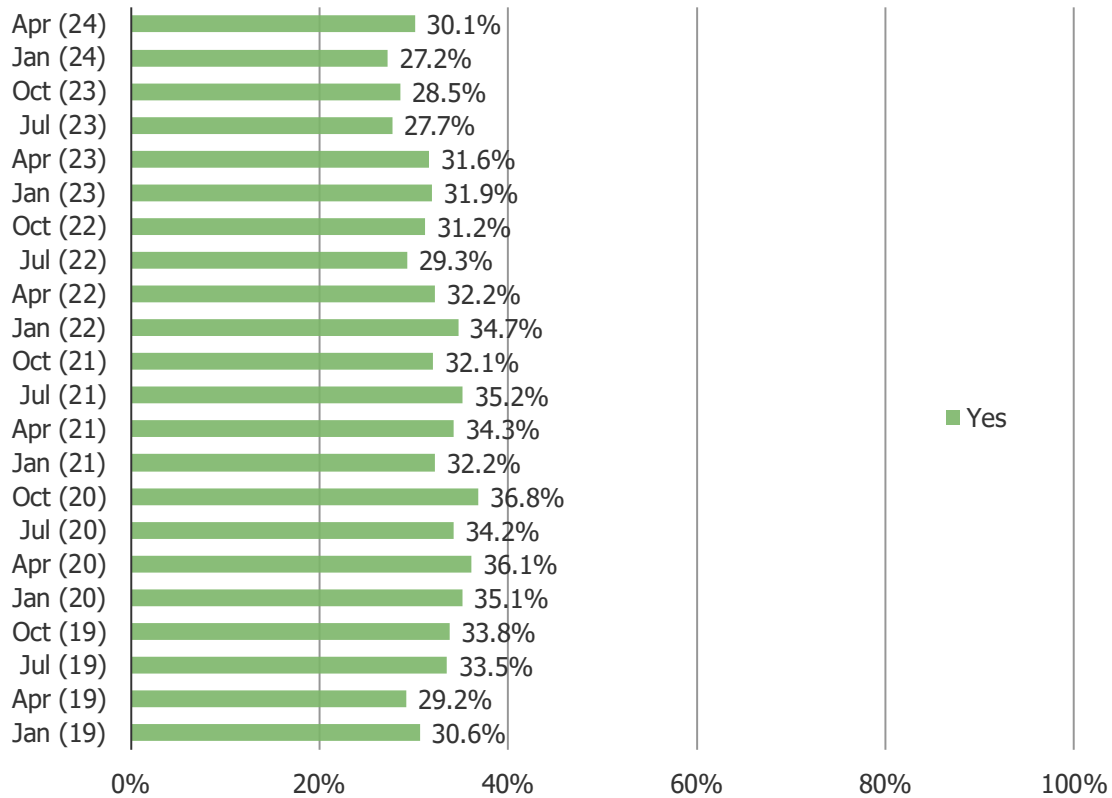
Posed to respondents who shop Temu regularly or occasionally and shop Etsy...



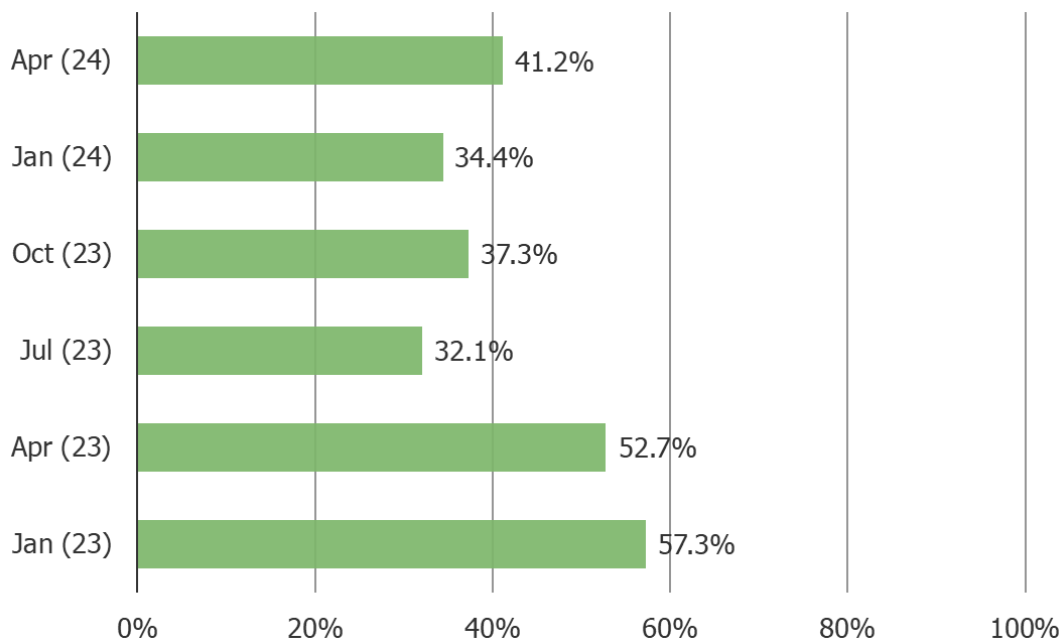
Temu

APPENDIX – WAYFAIR <> TEMU

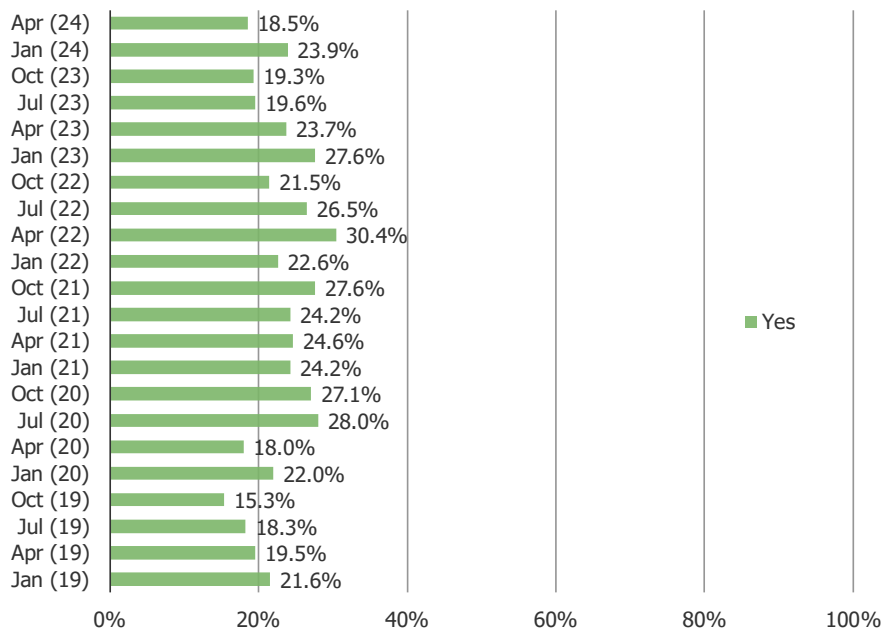
ALL RESPONDENTS - DO YOU EVER USE OR VISIT WAYFAIR?



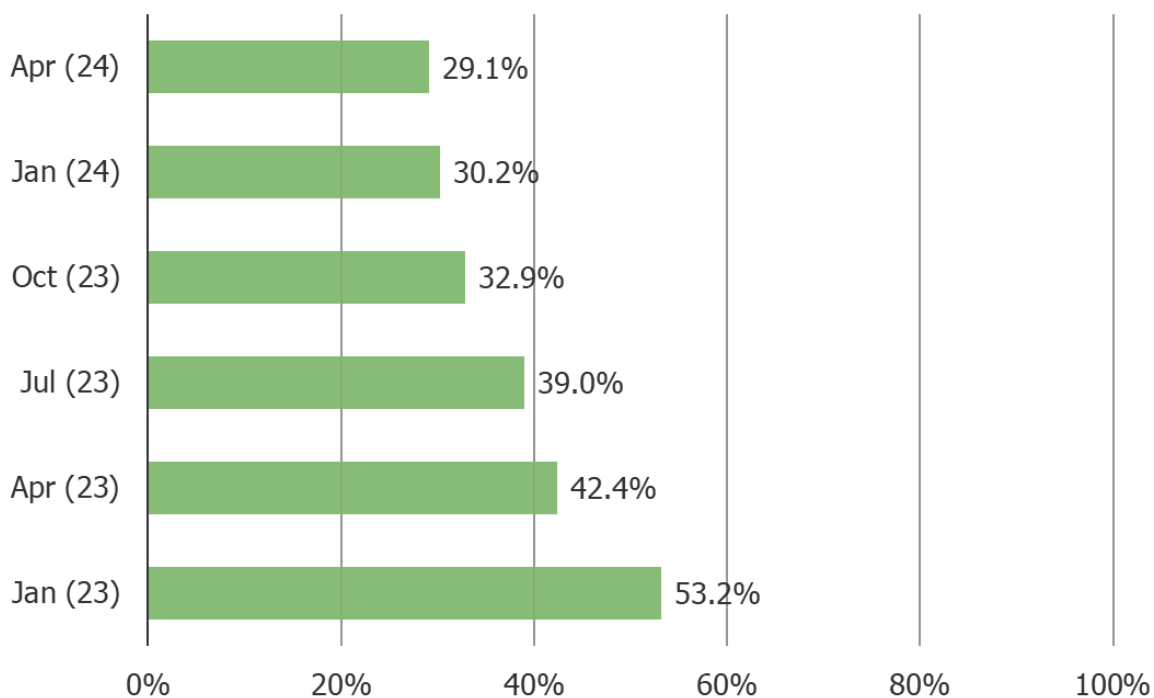
Posed to respondents who shop Temu regularly or occasionally...



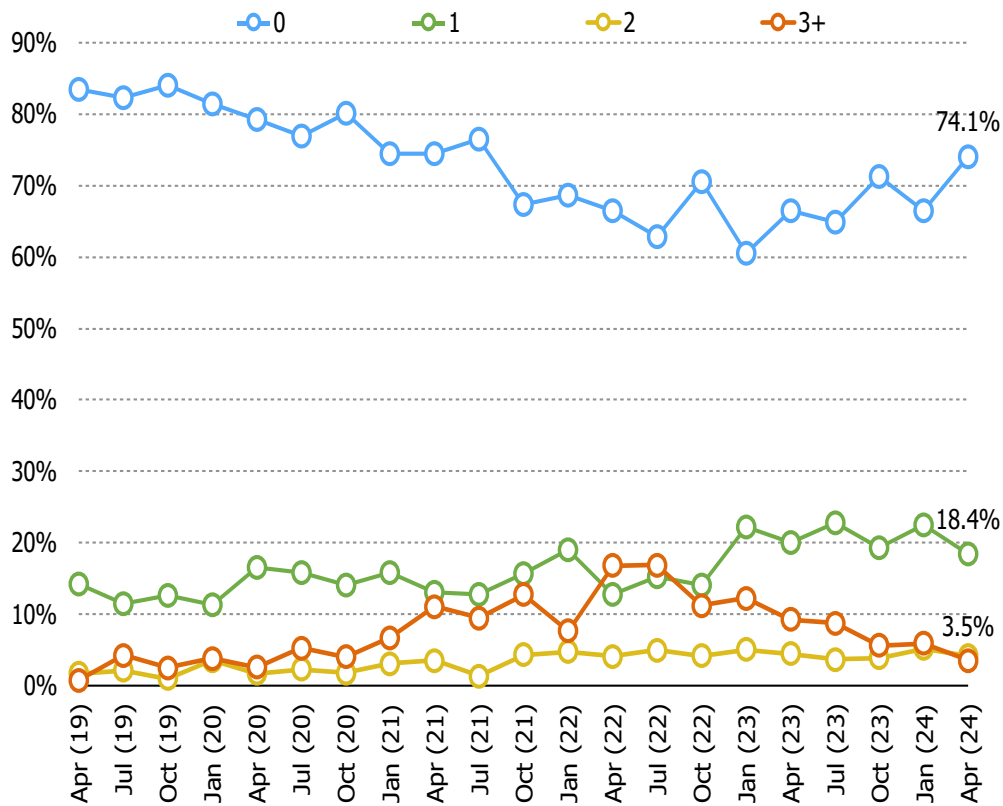
WAYFAIR USERS – HAVE YOU PURCHASED AN ITEM FROM WAYFAIR IN THE PAST THREE MONTHS?



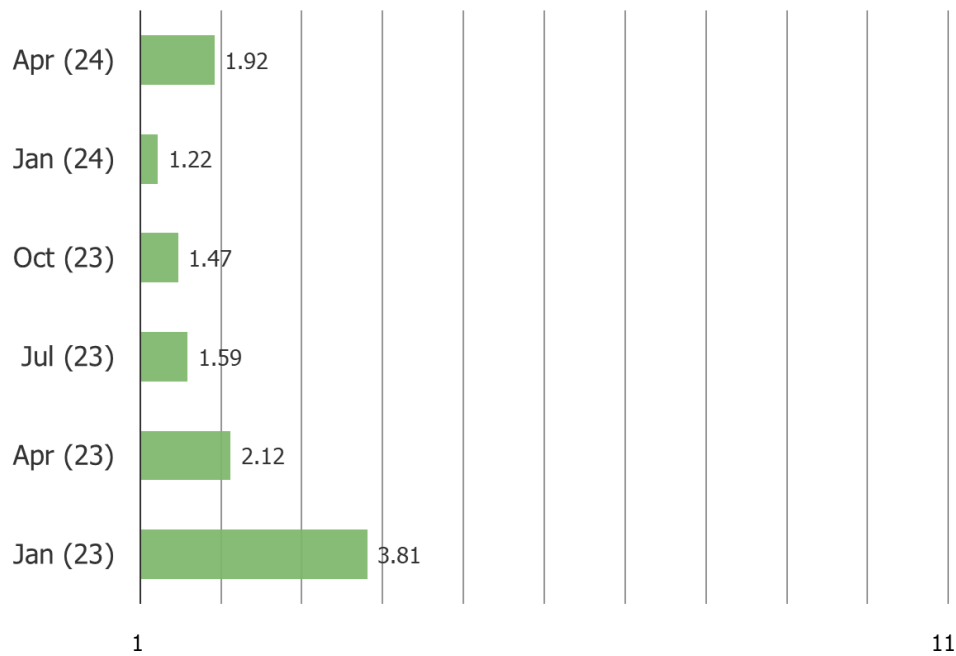
Posed to respondents who shop Temu regularly or occasionally and shop Wayfair...



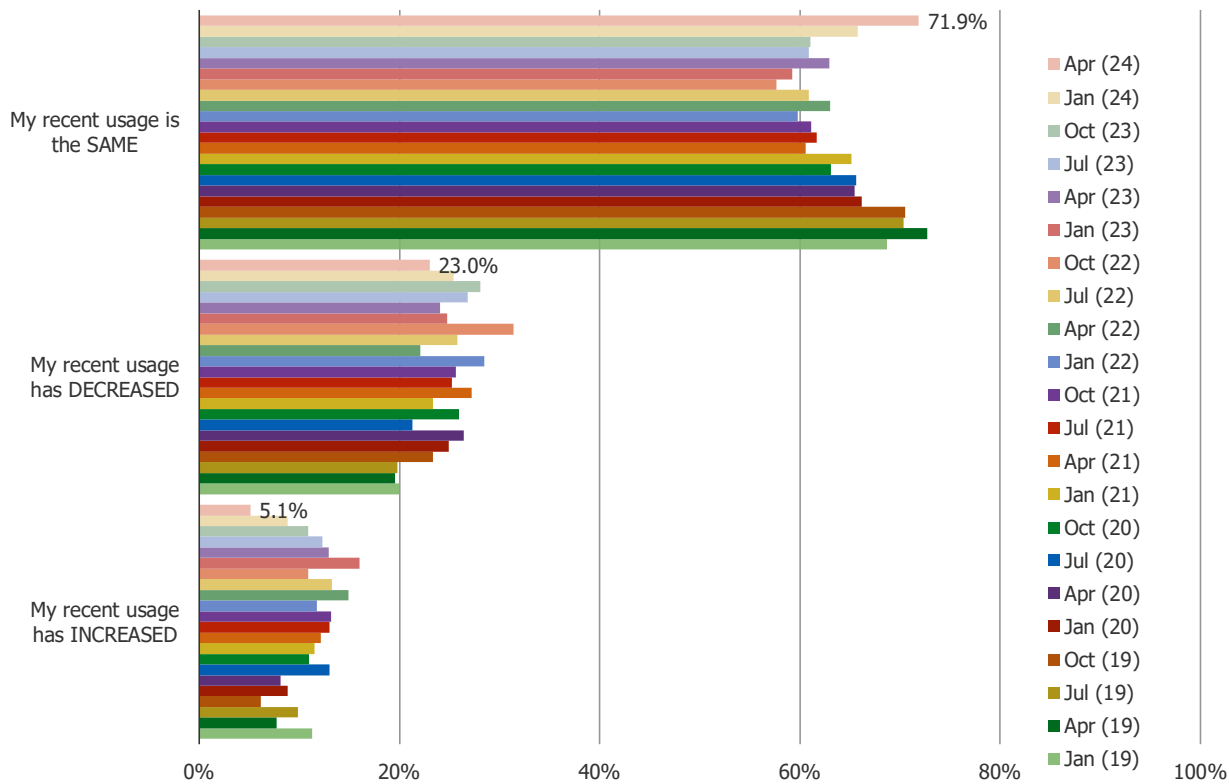
ON AVERAGE, HOW MANY ITEMS DO YOU PURCHASE FROM WAYFAIR PER MONTH?



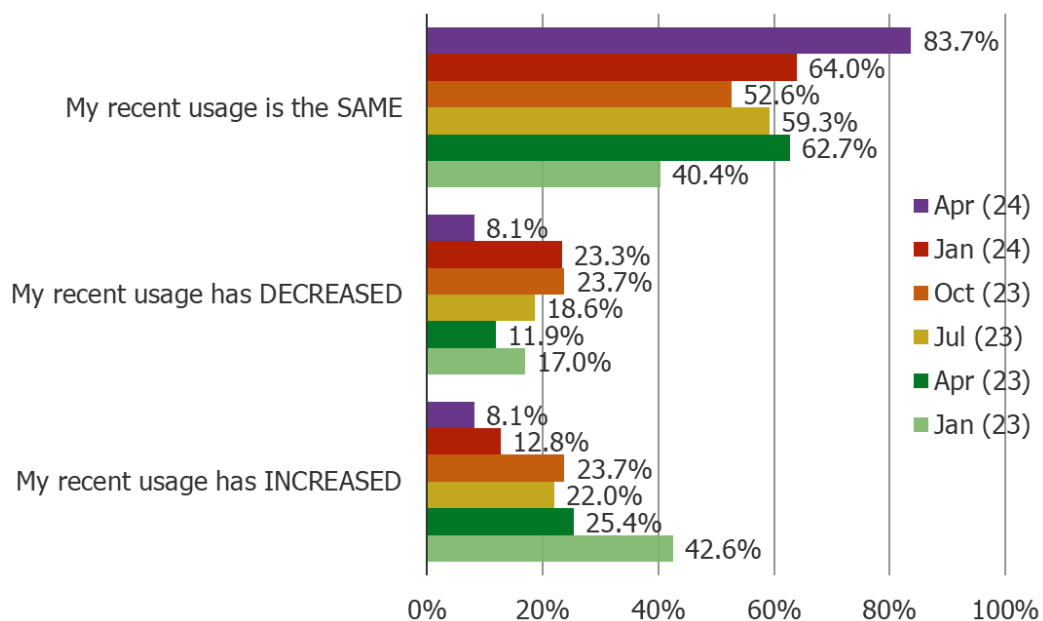
Posed to respondents who shop Temu regularly or occasionally and shop Wayfair...



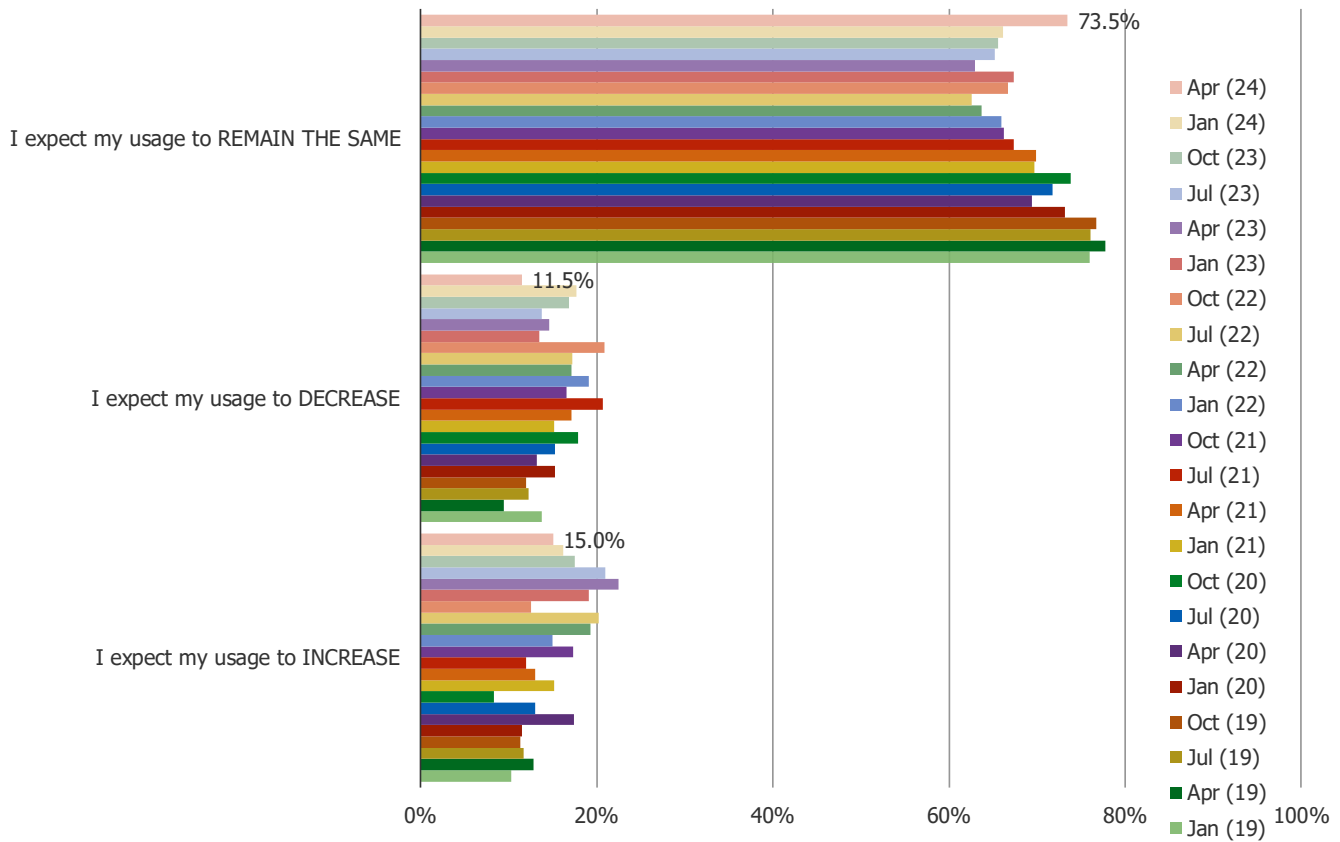
WAYFAIR USERS – RECENT USAGE



Posed to respondents who shop Temu regularly or occasionally and shop Wayfair...



WAYFAIR USERS – EXPECTED USAGE



Posed to respondents who shop Temu regularly or occasionally and shop Wayfair...

