

Bespoke Survey Research

January 2025

Temu

Volume 9 | Quarterly Survey

1,000+ US Consumers Balanced To Census

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

Key Takeaways:

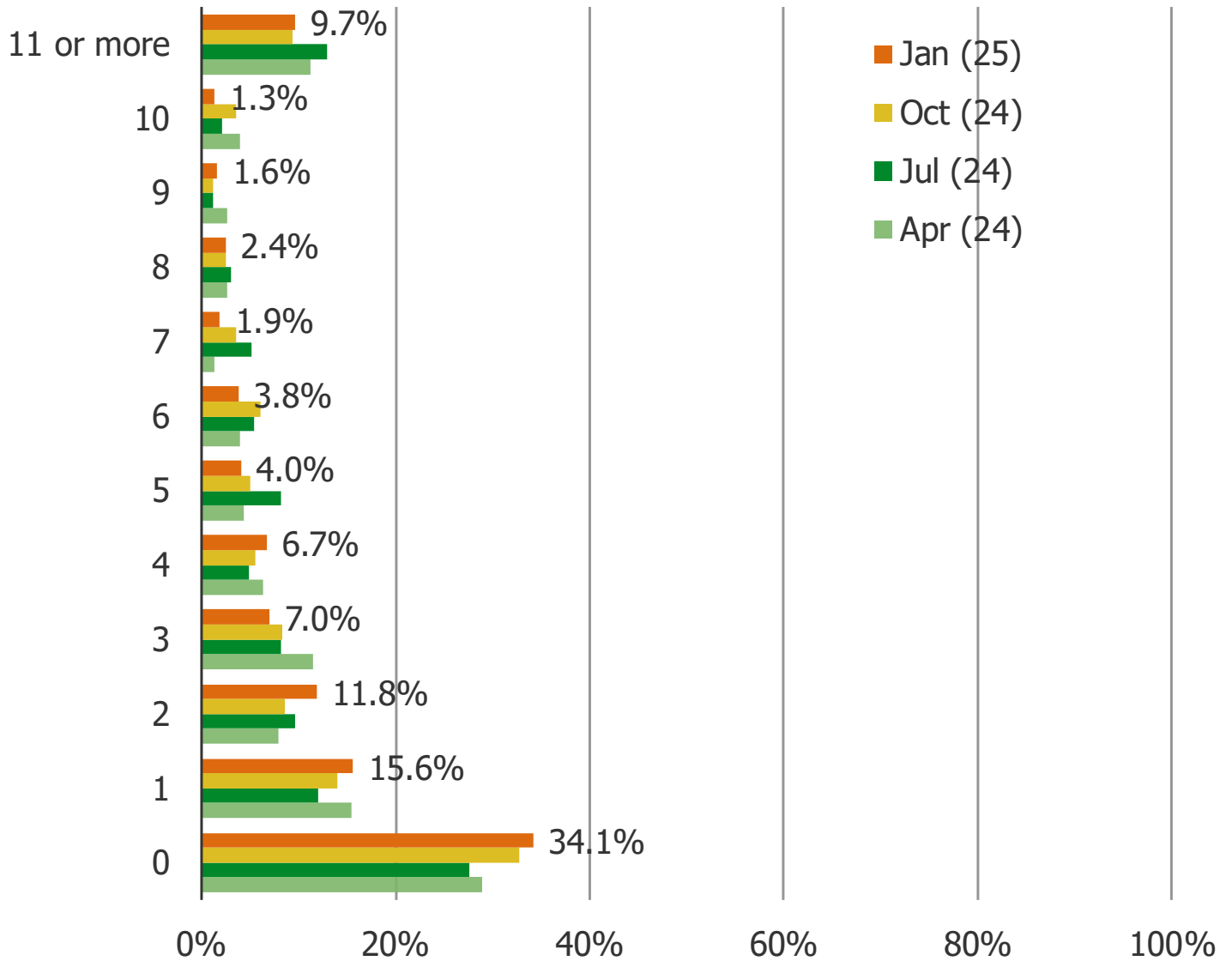
- ❑ The share of those who have shopped Amazon AND Temu who feels there is overlap between the types of items they would shop has declined sequentially.
- ❑ Awareness of Temu has increased again q/q. But the magnitude of the q/q increases are now not as significant as they were when we first started asking about Temu in 2023.
- ❑ Self-reported Temu customer purchase frequency was flat to slightly softer q/q. The share of consumers who shop Temu regularly has been flat over a period of quarters in which occasional shoppers and once but not again since shoppers increased.
- ❑ Expected shopping frequency of Temu going forward has softened sequentially over the history of our survey (low cost items perform better than higher cost items).
- ❑ Temu NPS flipped from positive in 2023 to negative in 2024 and into 2025 among all consumers who have ever shopped Temu. There remains a significant split in scores among those who shop it regularly (63) vs. occasionally (-2.89) vs. once but not again since (-59.13).
- ❑ Sentiment based feedback related to the platform's attributes has worsened over time across categories (quality, interesting items, shipping speed, mobile app experience, website experience, selection of products, and pricing of products).

Temu

RECENTLY ADDED QUESTIONS

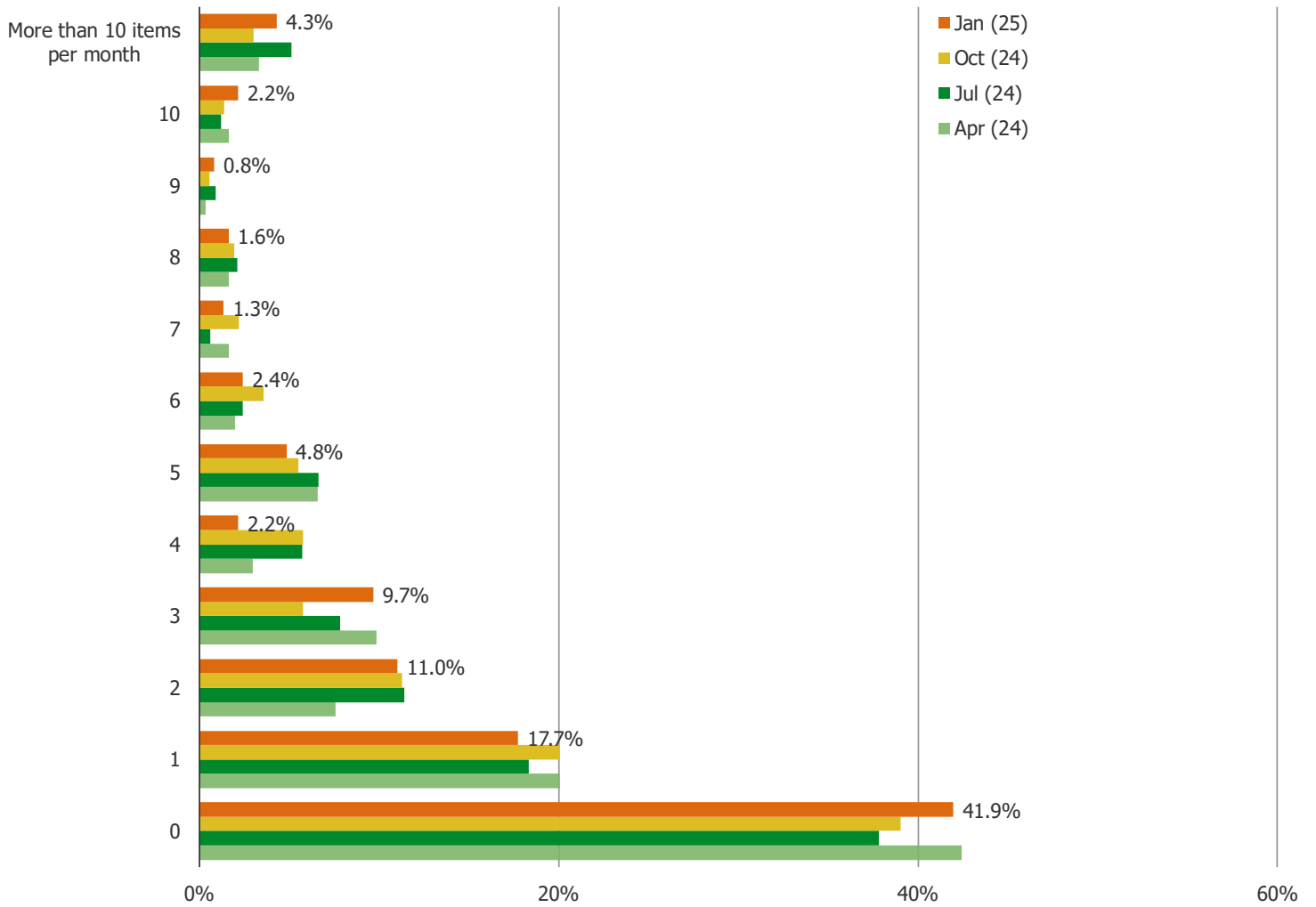
HOW MANY ITEMS HAVE YOU PURCHASED THROUGH TEMU IN THE LAST THREE MONTHS?

Posed to all respondents who have shopped Temu (N = 372).



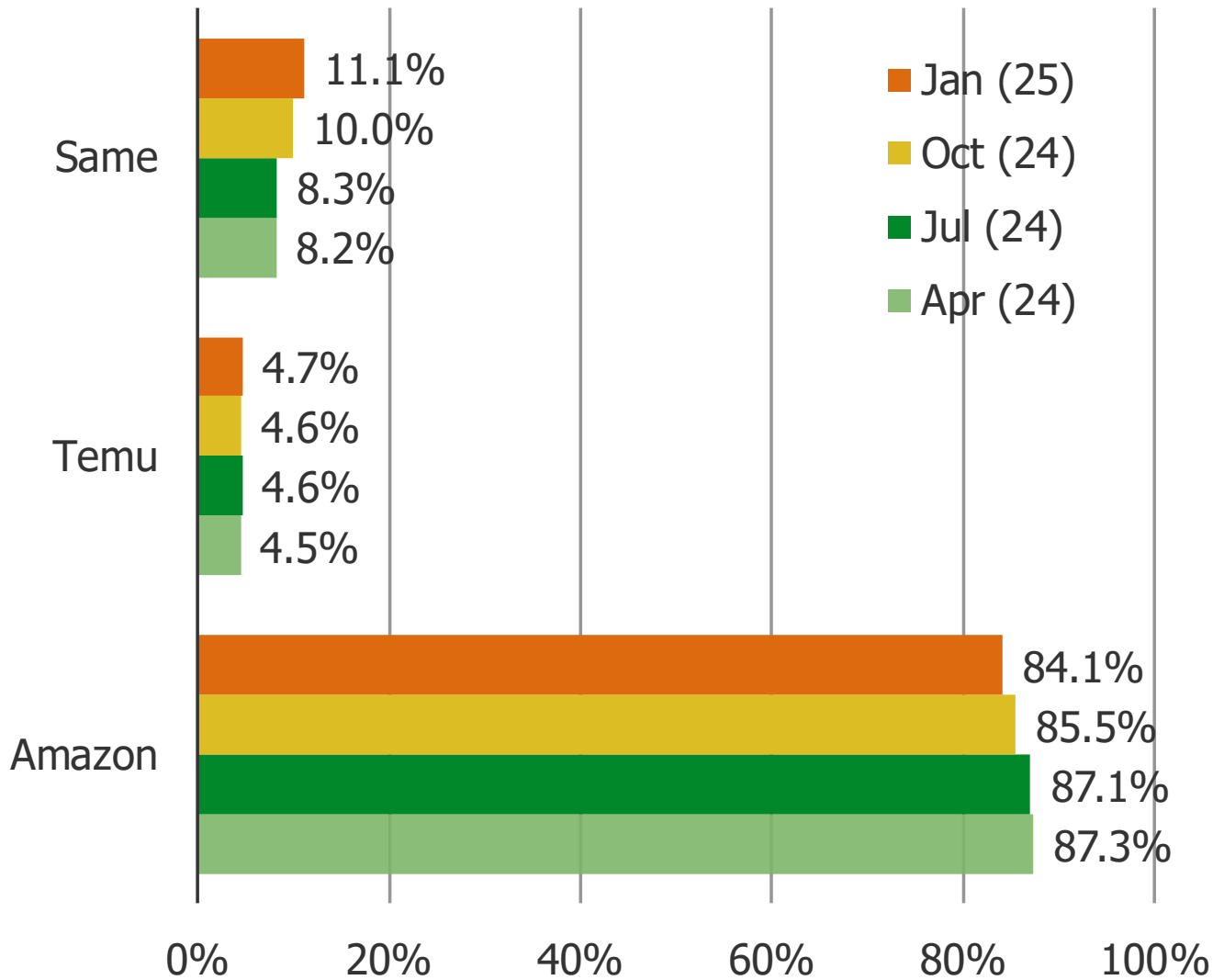
ON AVERAGE, HOW MANY ITEMS DO YOU BUY ON TEMU PER MONTH?

Posed to all respondents who have shopped Temu (N = 372).



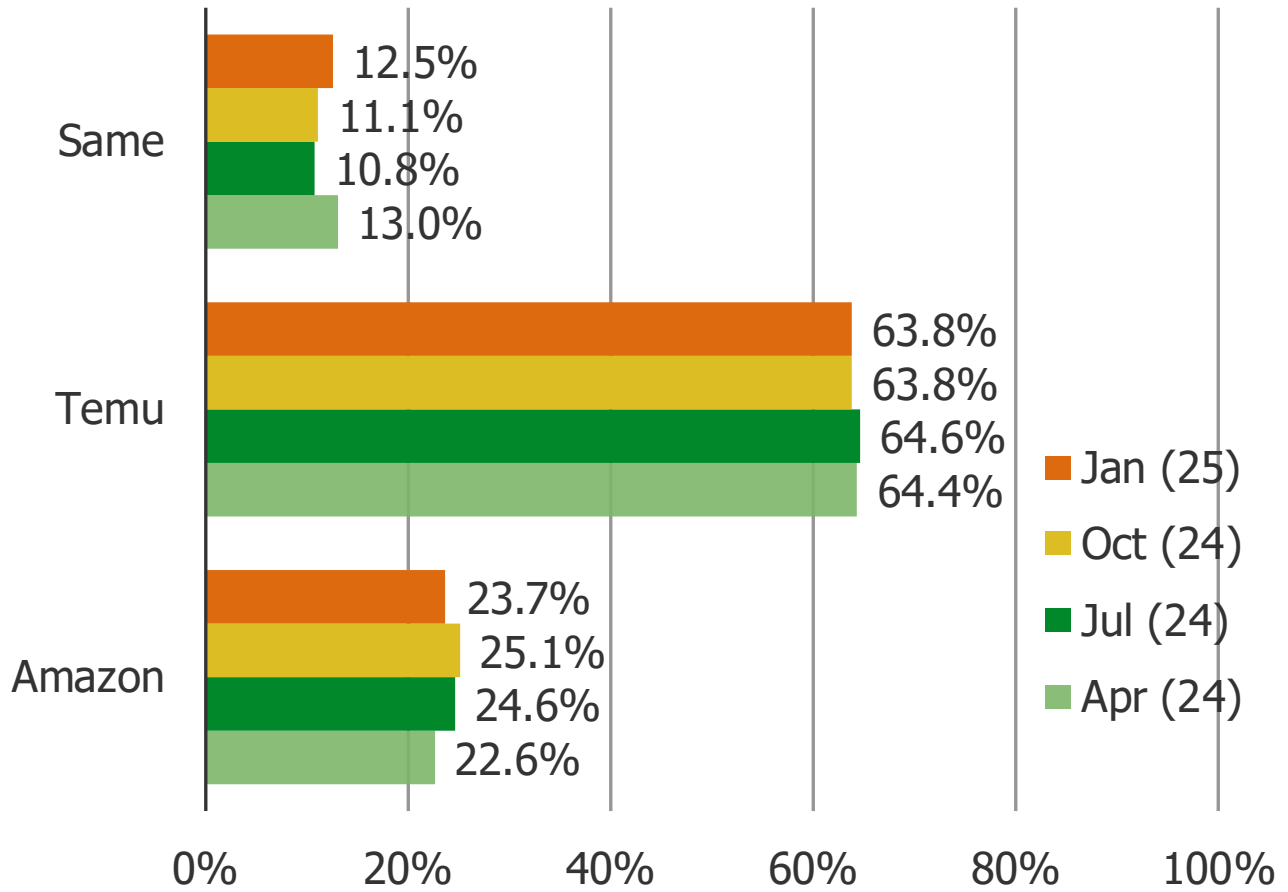
YOU MENTIONED EARLIER THAT YOU HAVE USED BOTH AMAZON AND TEMU...WHICH DO YOU THINK HAS BETTER DELIVERY SPEEDS?

Posed to all respondents who have used both Amazon and Temu (N = 359).



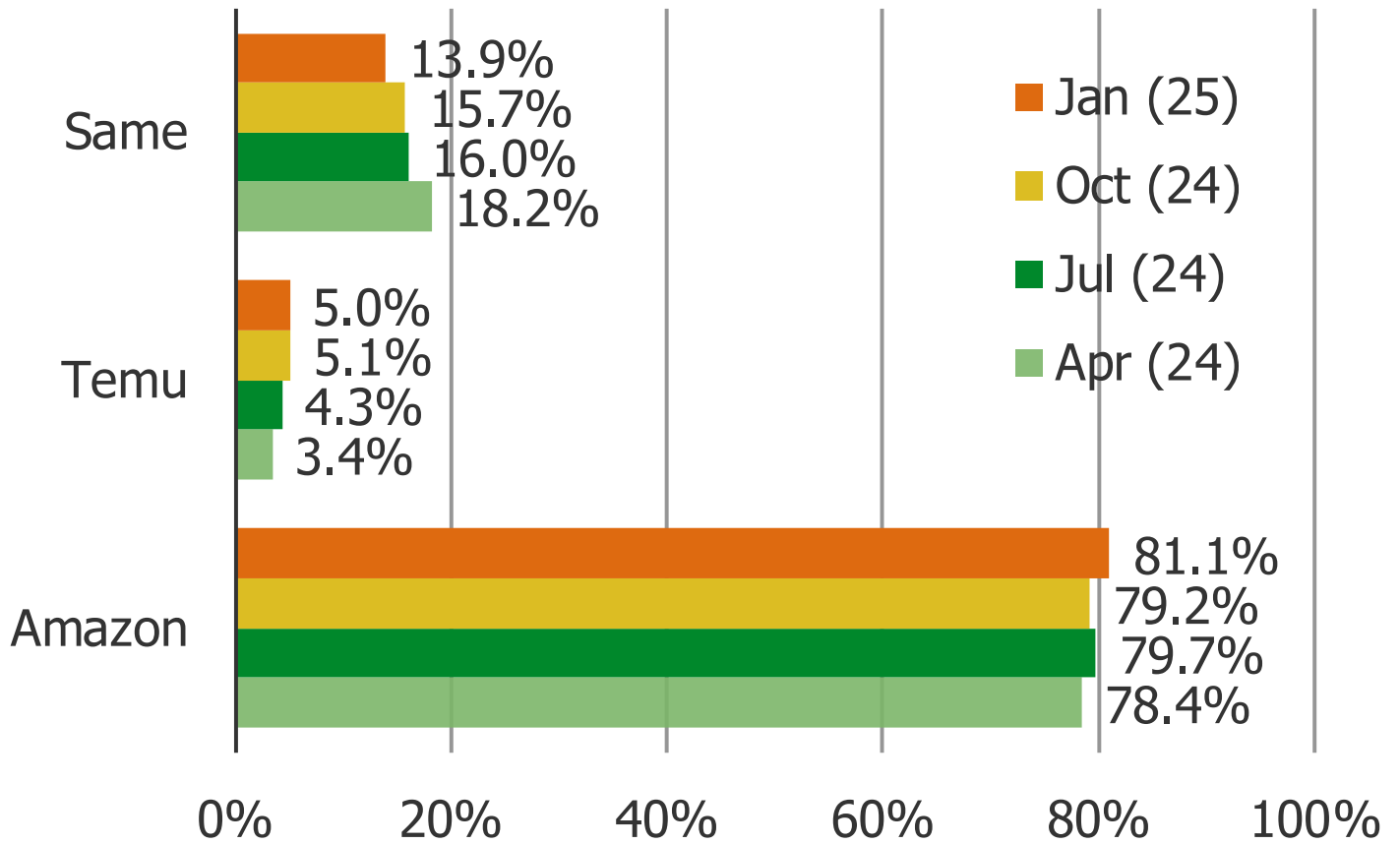
YOU MENTIONED EARLIER THAT YOU HAVE USED BOTH AMAZON AND TEMU...WHICH DO YOU THINK HAS BETTER PRICES?

Posed to all respondents who have used both Amazon and Temu (N = 359).



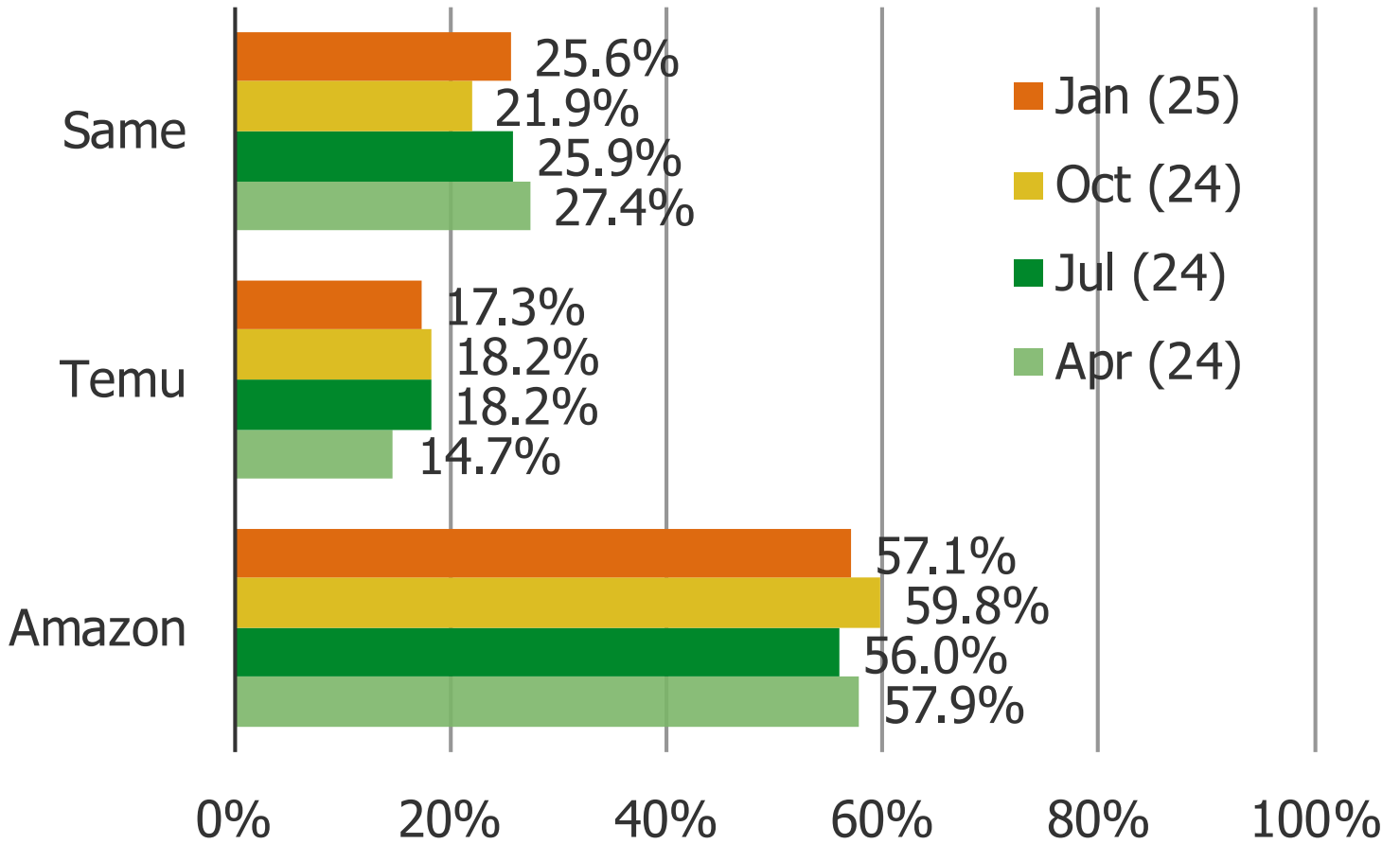
YOU MENTIONED EARLIER THAT YOU HAVE USED BOTH AMAZON AND TEMU...WHICH DO YOU THINK HAS BETTER QUALITY PRODUCTS?

Posed to all respondents who have used both Amazon and Temu (N = 359).



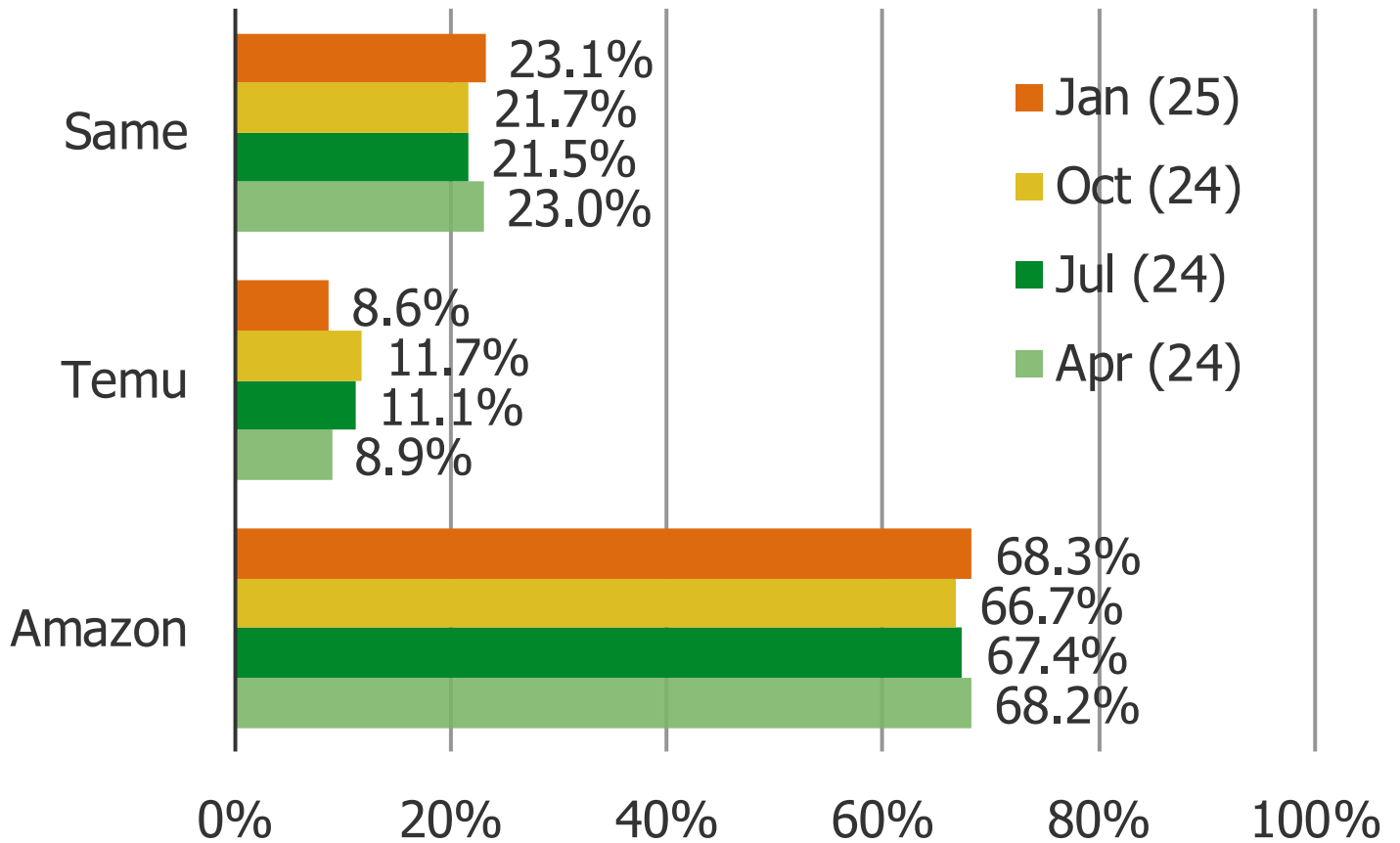
YOU MENTIONED EARLIER THAT YOU HAVE USED BOTH AMAZON AND TEMU...WHICH DO YOU THINK HAS BETTER SELECTION?

Posed to all respondents who have used both Amazon and Temu (N = 359).



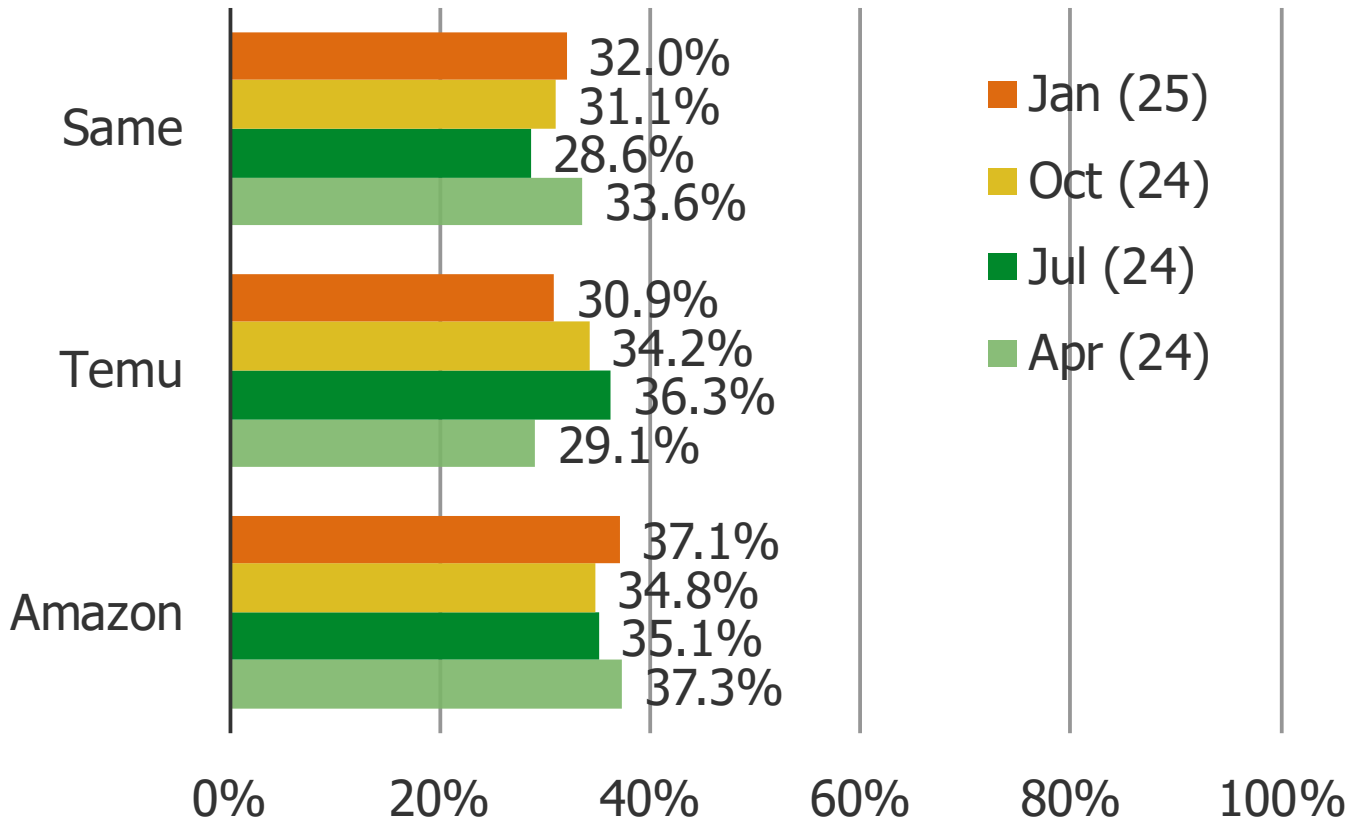
YOU MENTIONED EARLIER THAT YOU HAVE USED BOTH AMAZON AND TEMU...WHICH DO YOU THINK IS BETTER FOR RETURNS?

Posed to all respondents who have used both Amazon and Temu (N = 359).



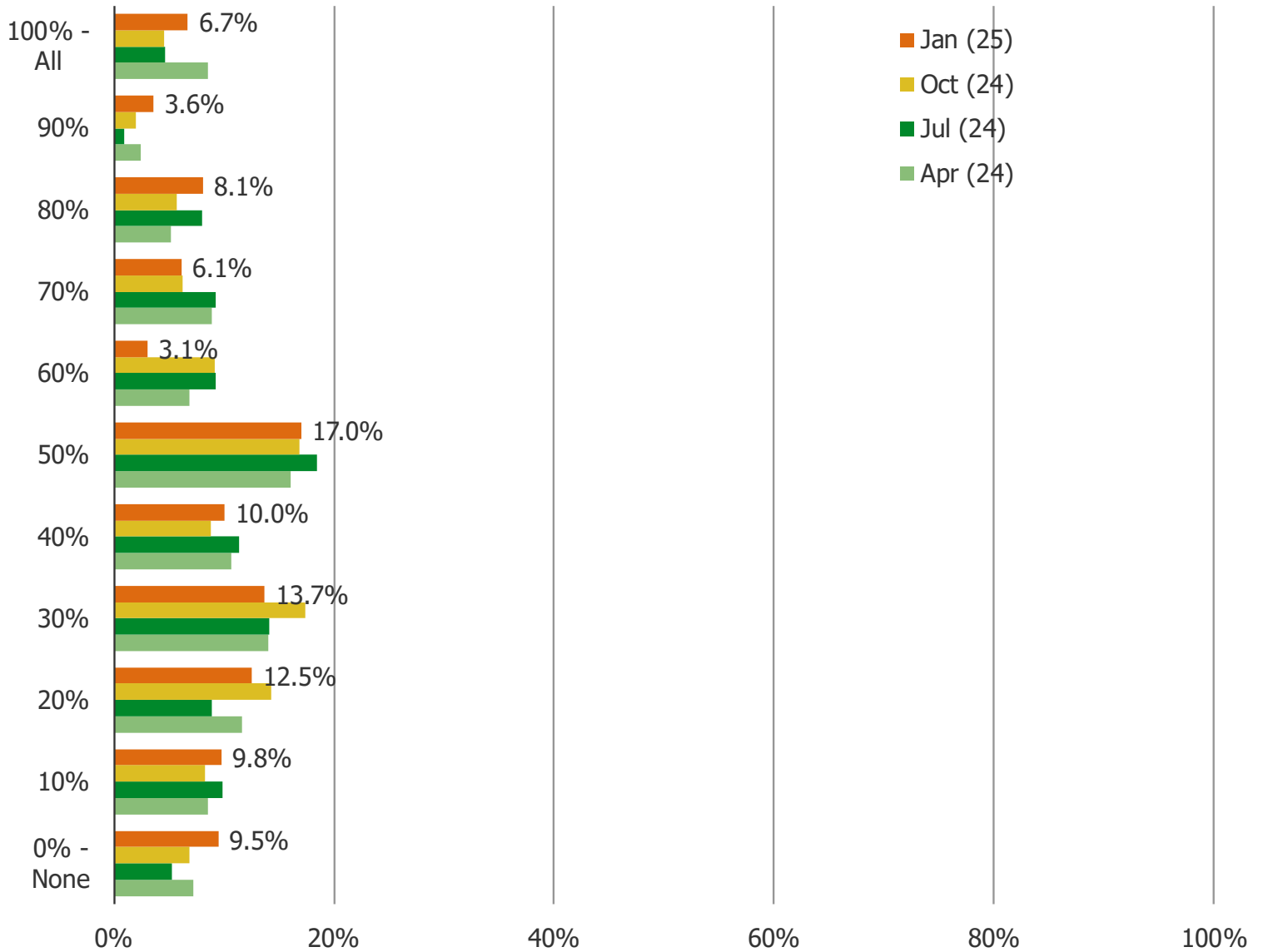
YOU MENTIONED EARLIER THAT YOU HAVE USED BOTH AMAZON AND TEMU...WHICH DO YOU THINK IS MORE FUN TO SHOP?

Posed to all respondents who have used both Amazon and Temu (N = 359).



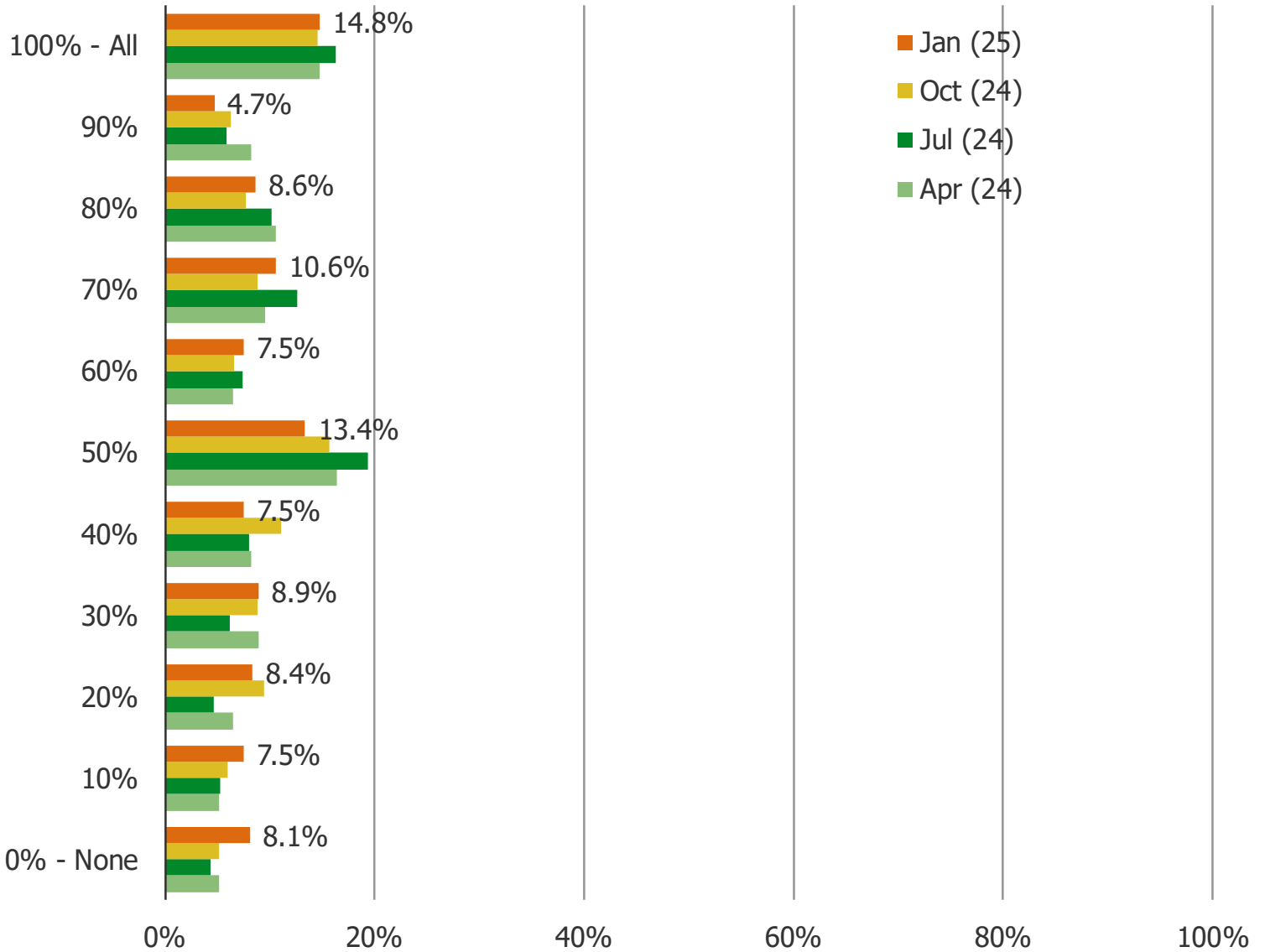
WHAT PERCENTAGE OF ITEMS THAT YOU WOULD TYPICALLY BUY ON AMAZON DO YOU THINK YOU COULD ALSO FIND ON TEMU?

Posed to all respondents who have used both Amazon and Temu (N = 359).



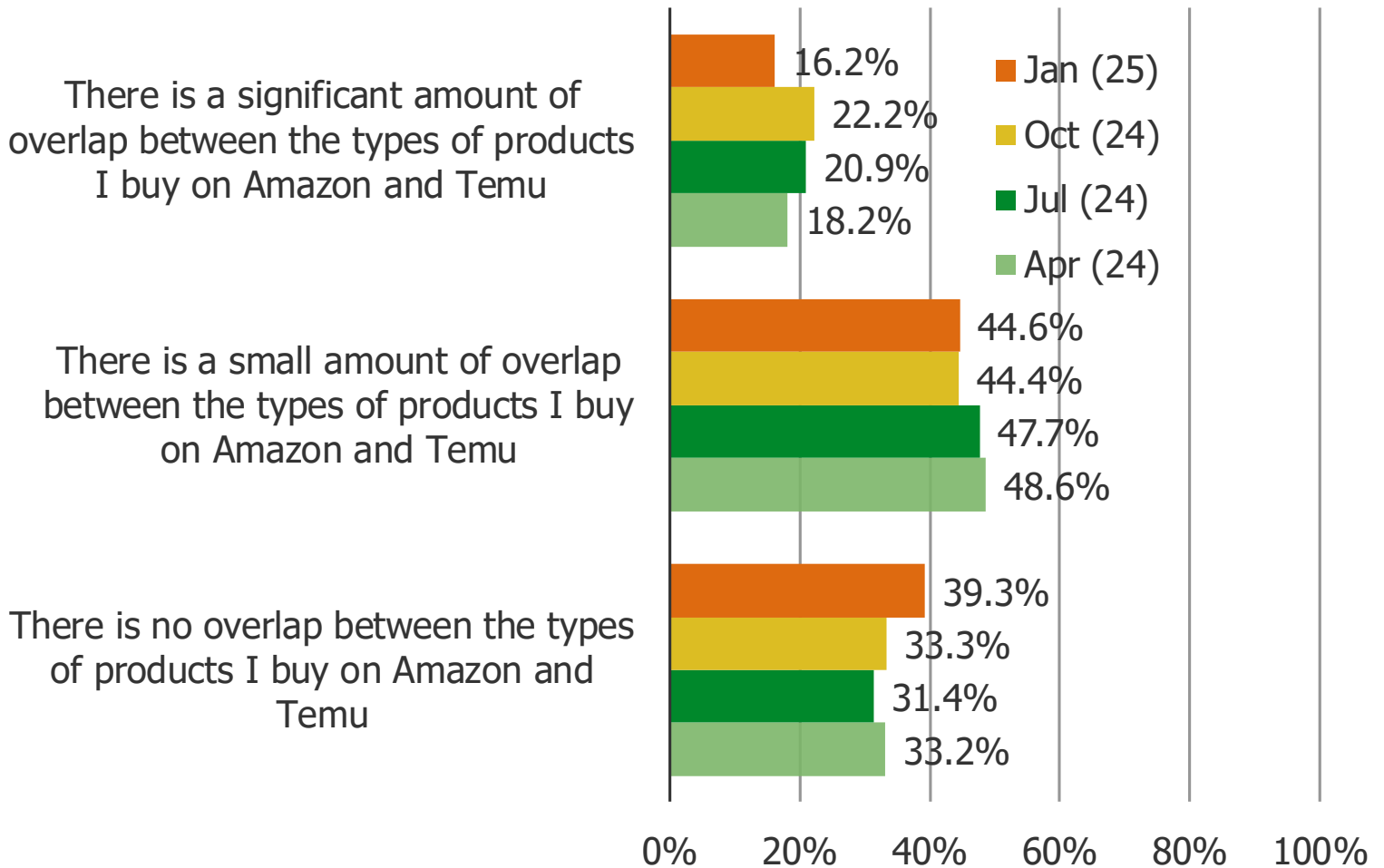
WHAT PERCENTAGE OF ITEMS THAT YOU WOULD TYPICALLY BUY ON TEMU DO YOU THINK YOU COULD ALSO FIND ON AMAZON?

Posed to all respondents who have used both Amazon and Temu (N = 359).



WHICH OF THE FOLLOWING BEST DESCRIBES YOU?

Posed to all respondents who have used both Amazon and Temu (N = 359).

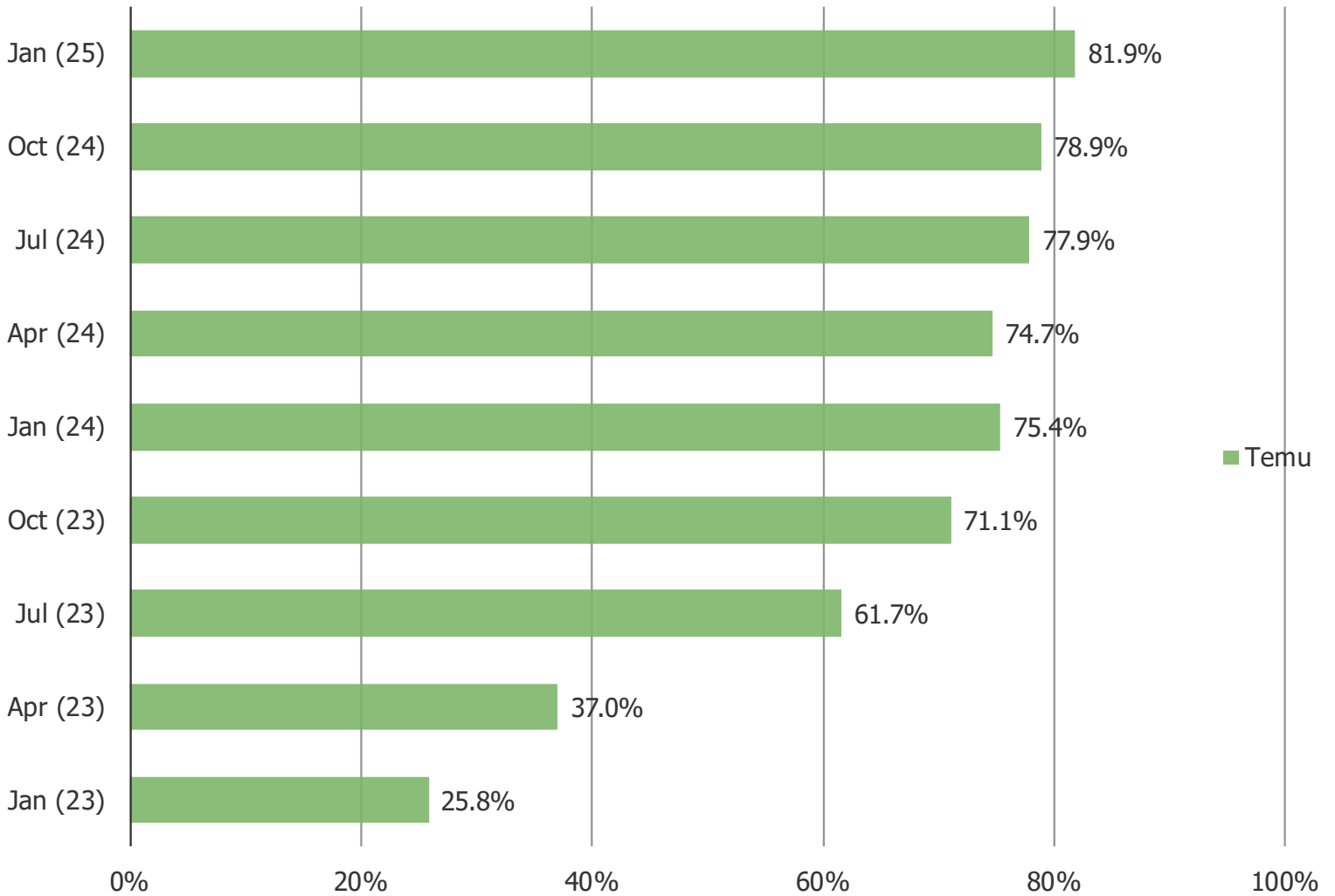


Temu

TEMU ENGAGEMENT AND SENTIMENT

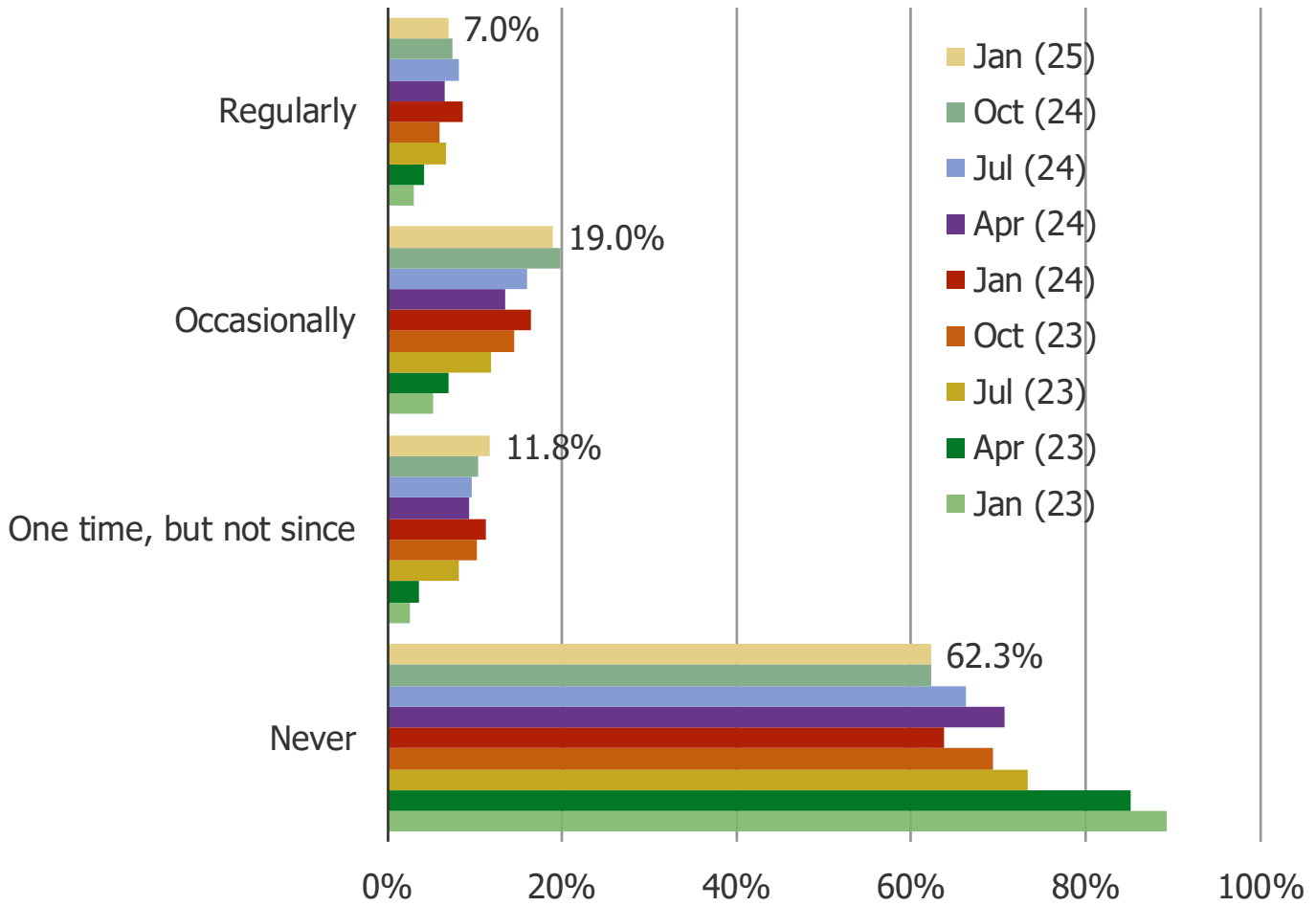
% AWARE OF TEMU

Posed to all respondents



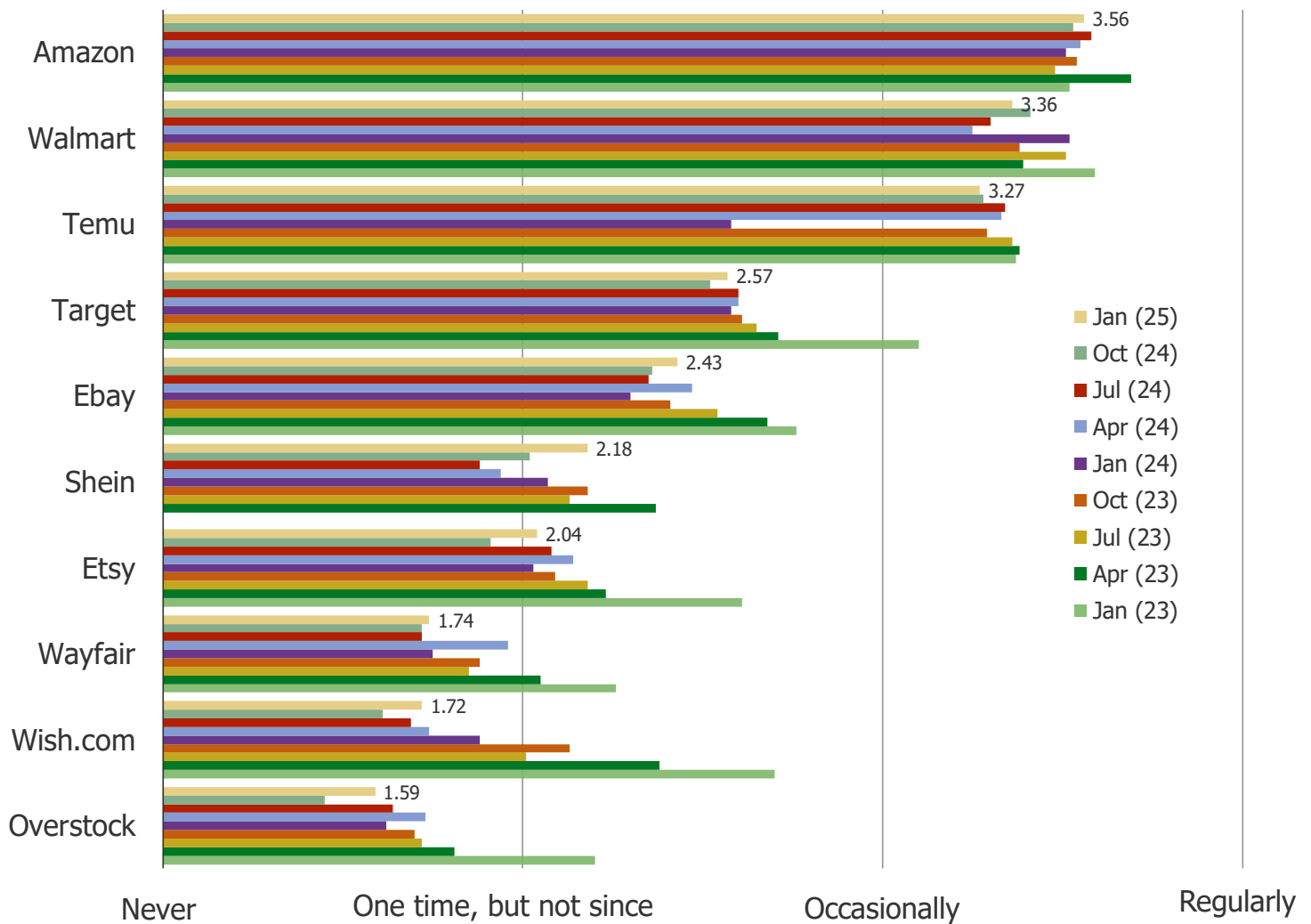
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH TEMU?

Posed to all respondents



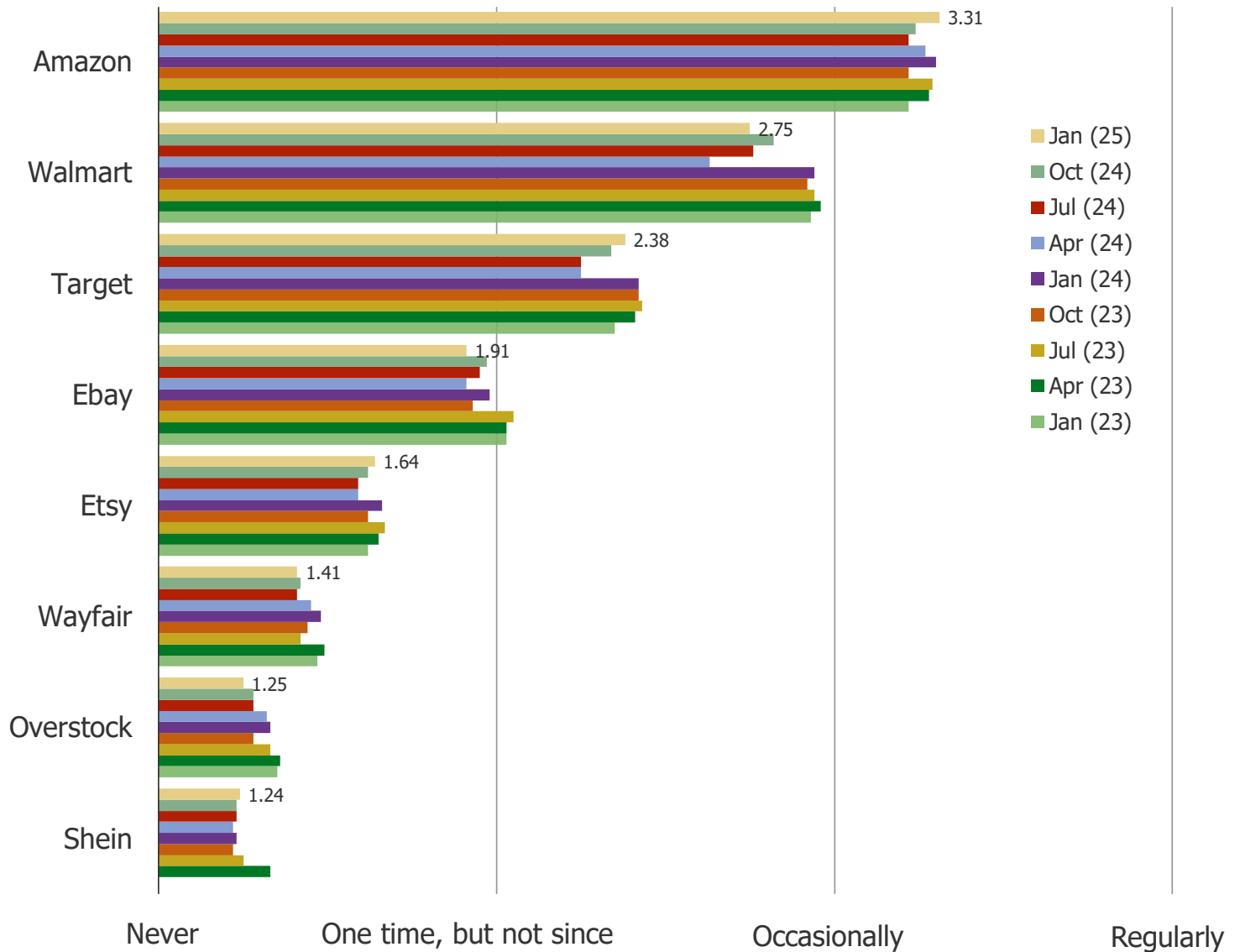
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH THE FOLLOWING PLATFORMS?

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



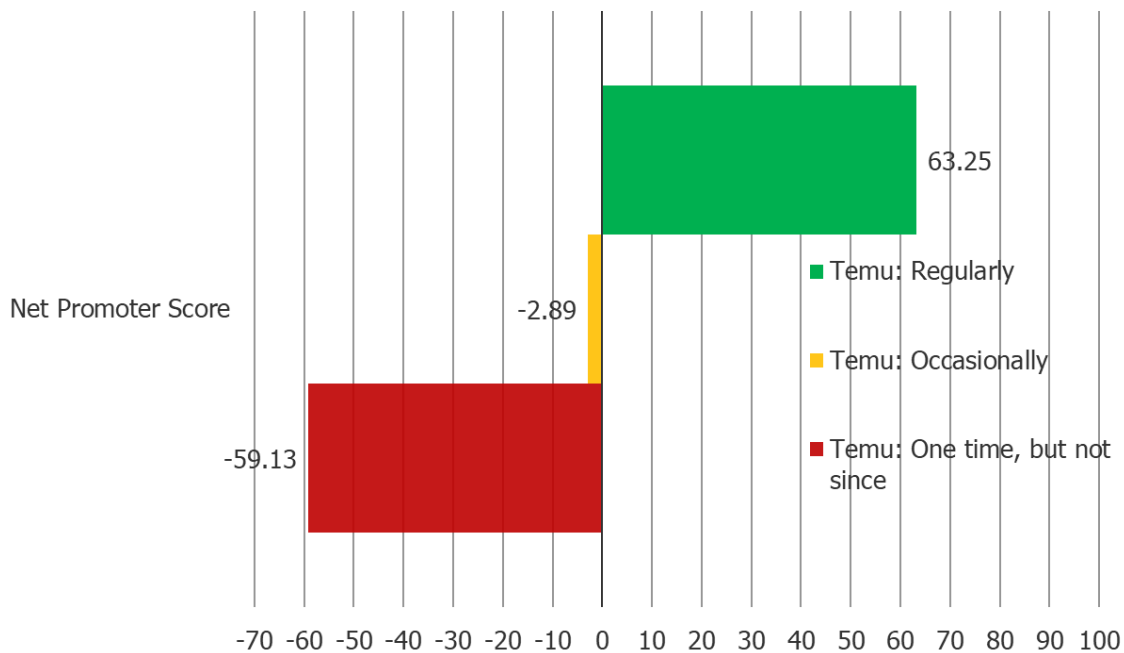
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH THE FOLLOWING PLATFORMS?

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

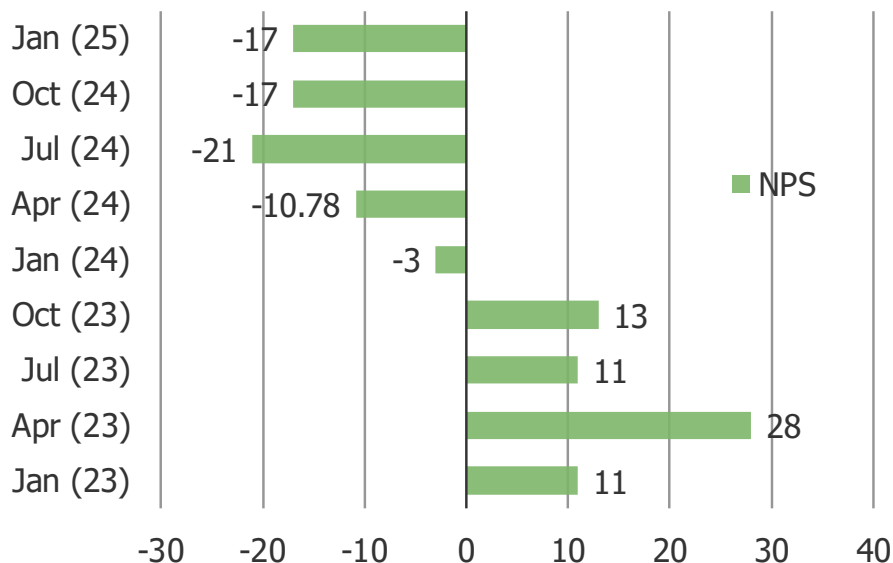


HOW LIKELY IS IT THAT YOU WOULD RECOMMEND TEMU TO A FRIEND OR COLLEAGUE?

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

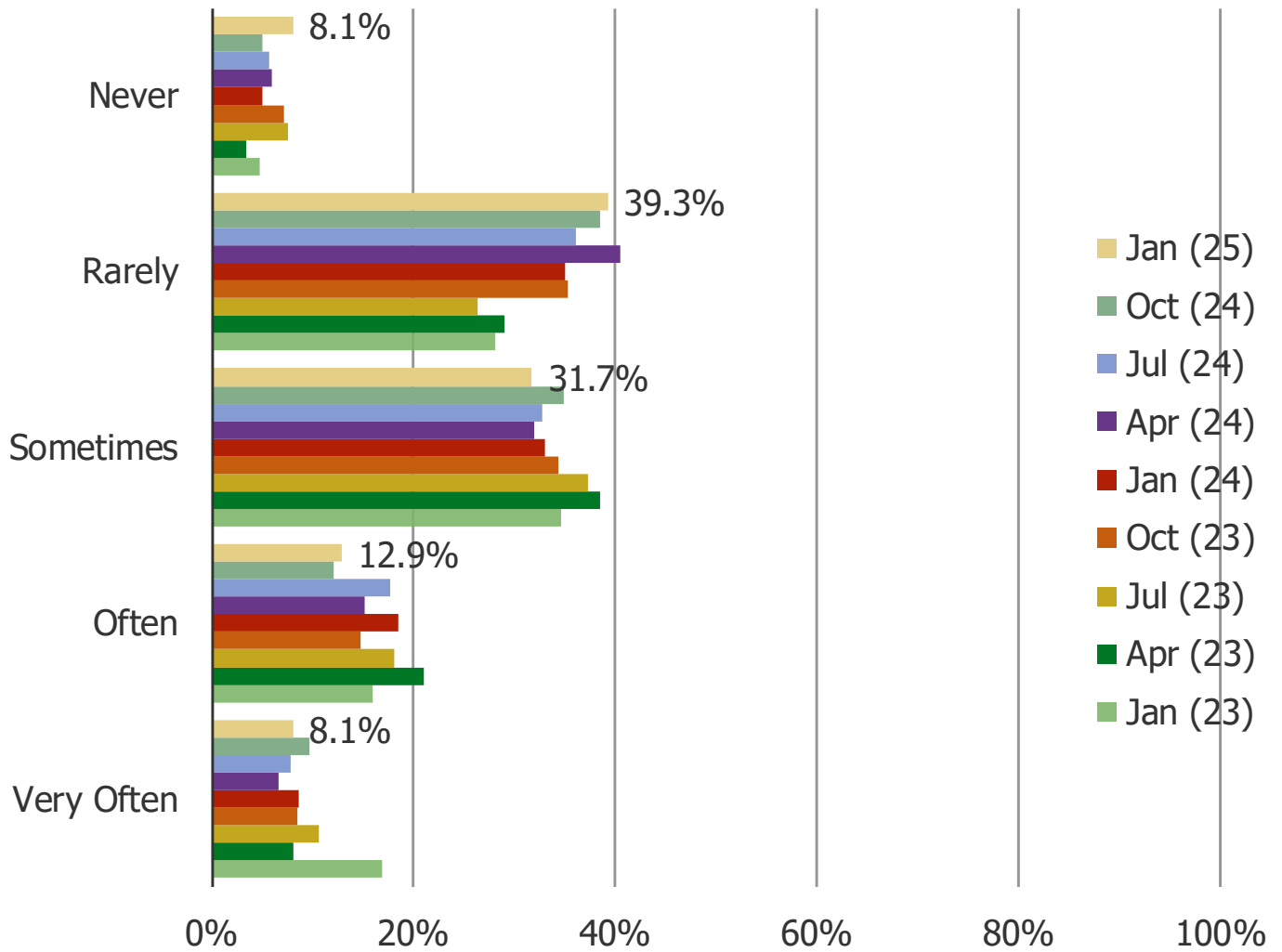


All who have shopped Temu (ever), wave by wave.



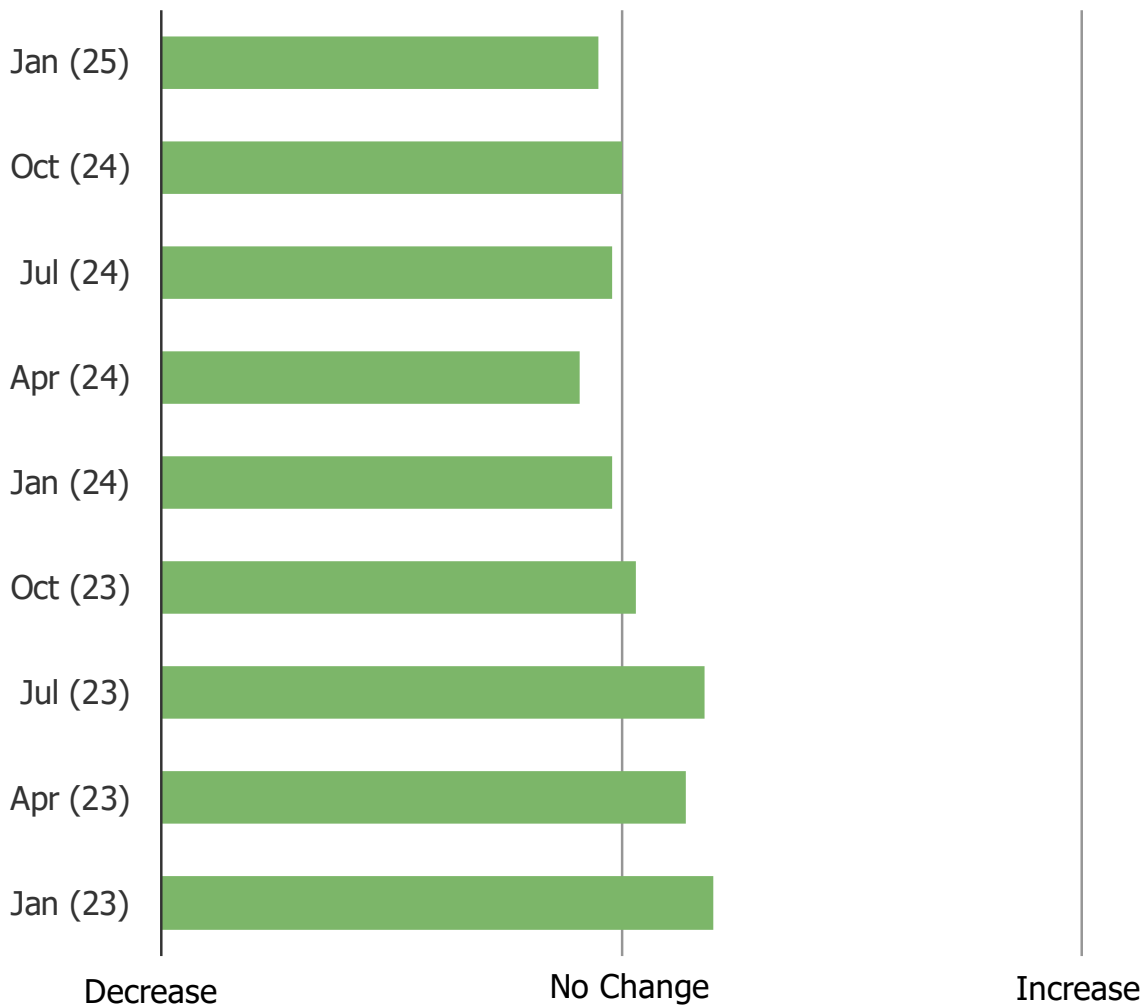
HOW OFTEN DO YOU BUY PRODUCTS ON TEMU?

Posed to all respondents who have shopped Temu (N = 372)



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

Posed to all respondents who have shopped Temu (N = 372)



Reasons cited for decreasing:

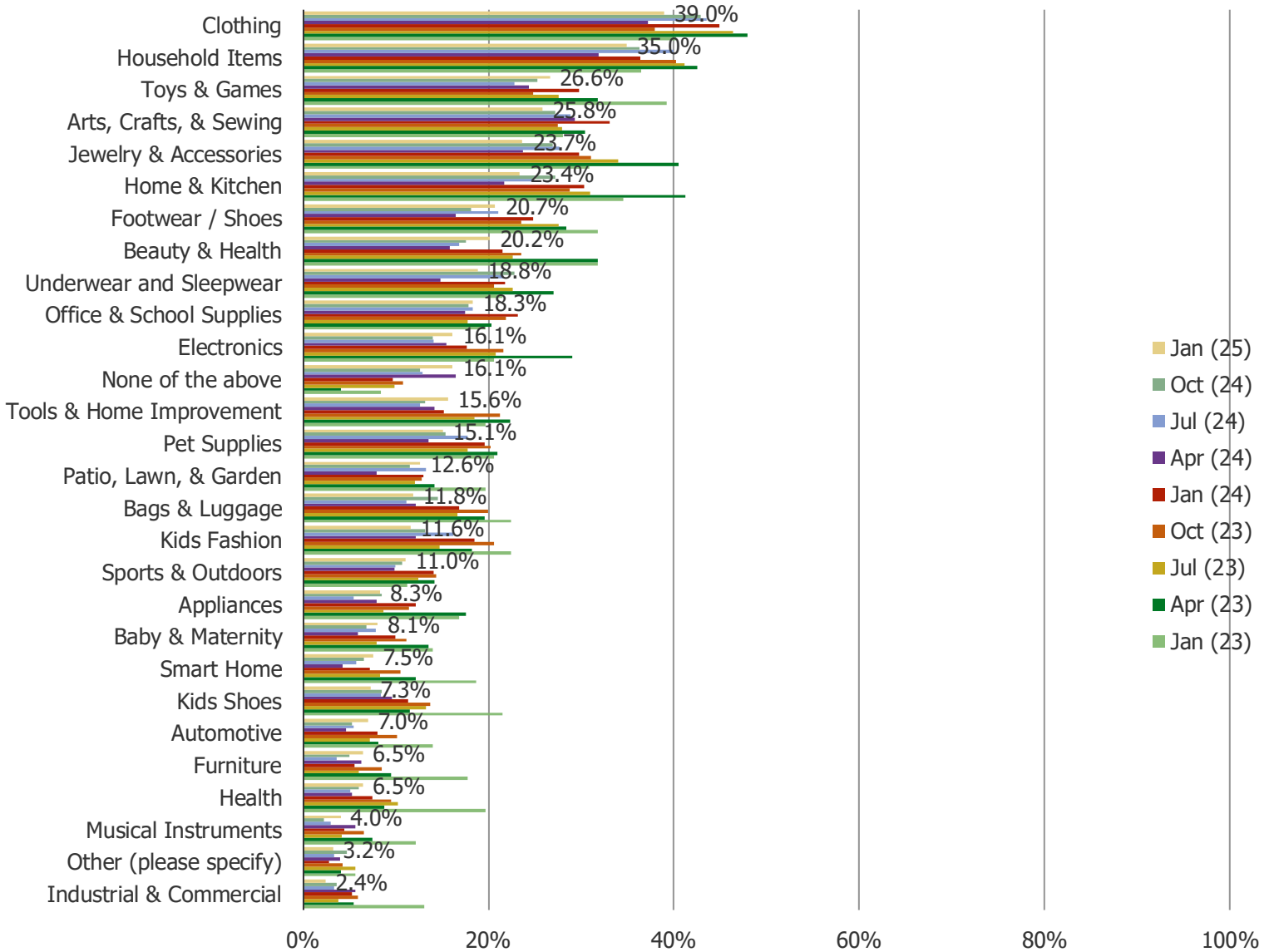
- Poor quality
- Made in China
- Slow shipping
- Cutting back spending in general

Reasons cited for increasing:

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

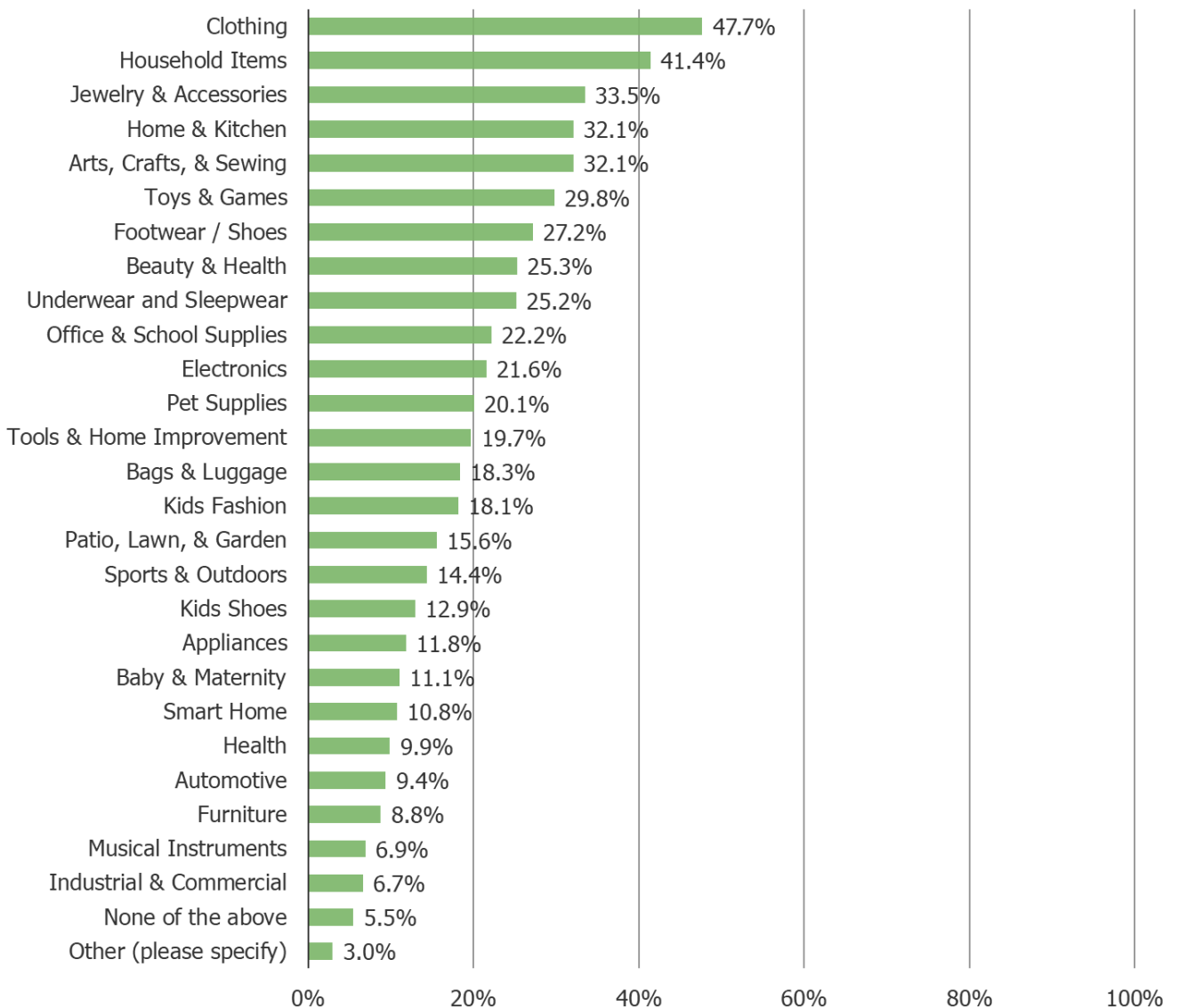
WHICH TYPES OF PRODUCTS DO YOU FEEL TEMU IS BEST FOR? SELECT ALL THAT APPLY

Posed to all respondents who have shopped Temu (N = 372)



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

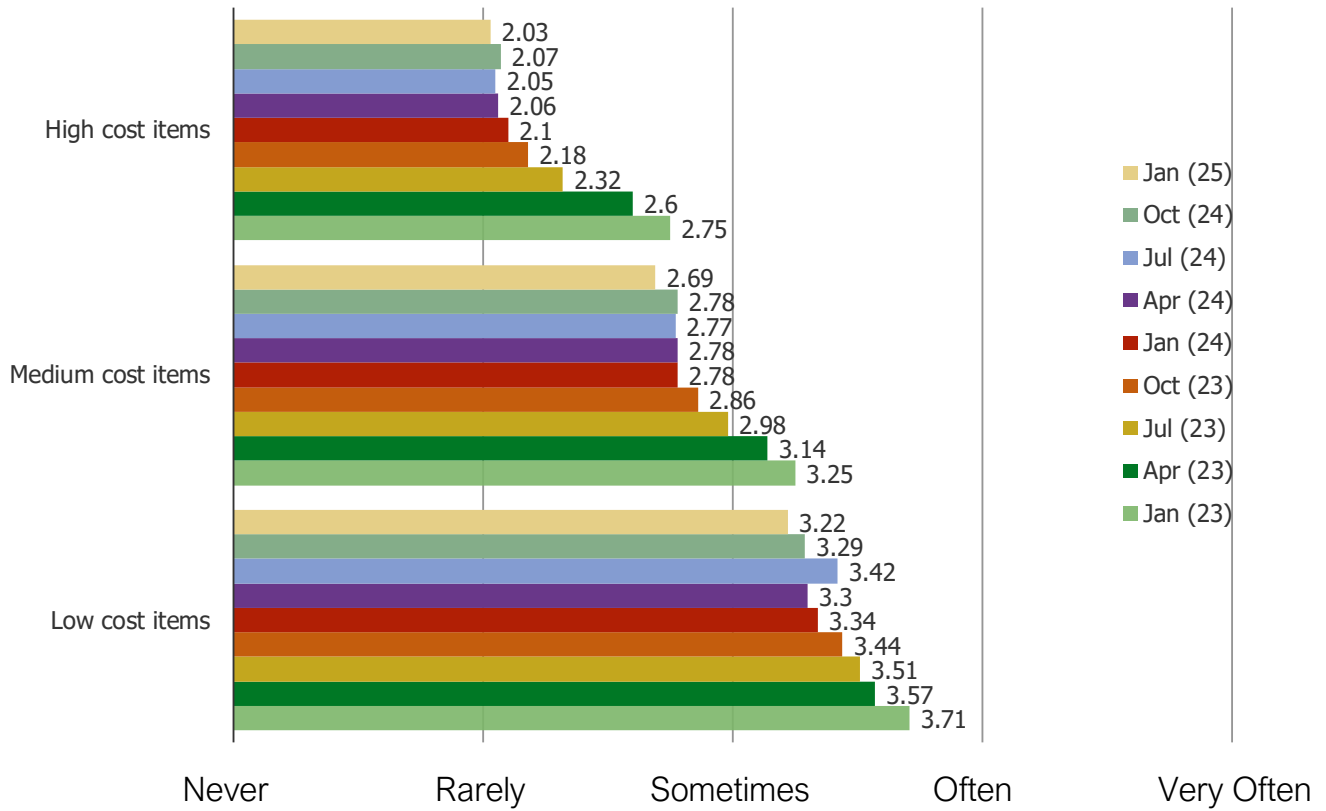
Posed to respondents who said they shop Temu regularly/occasionally (N = 1979)



*Combining all responses from all waves to date (2023+2024+2025ytd) 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 = 372)

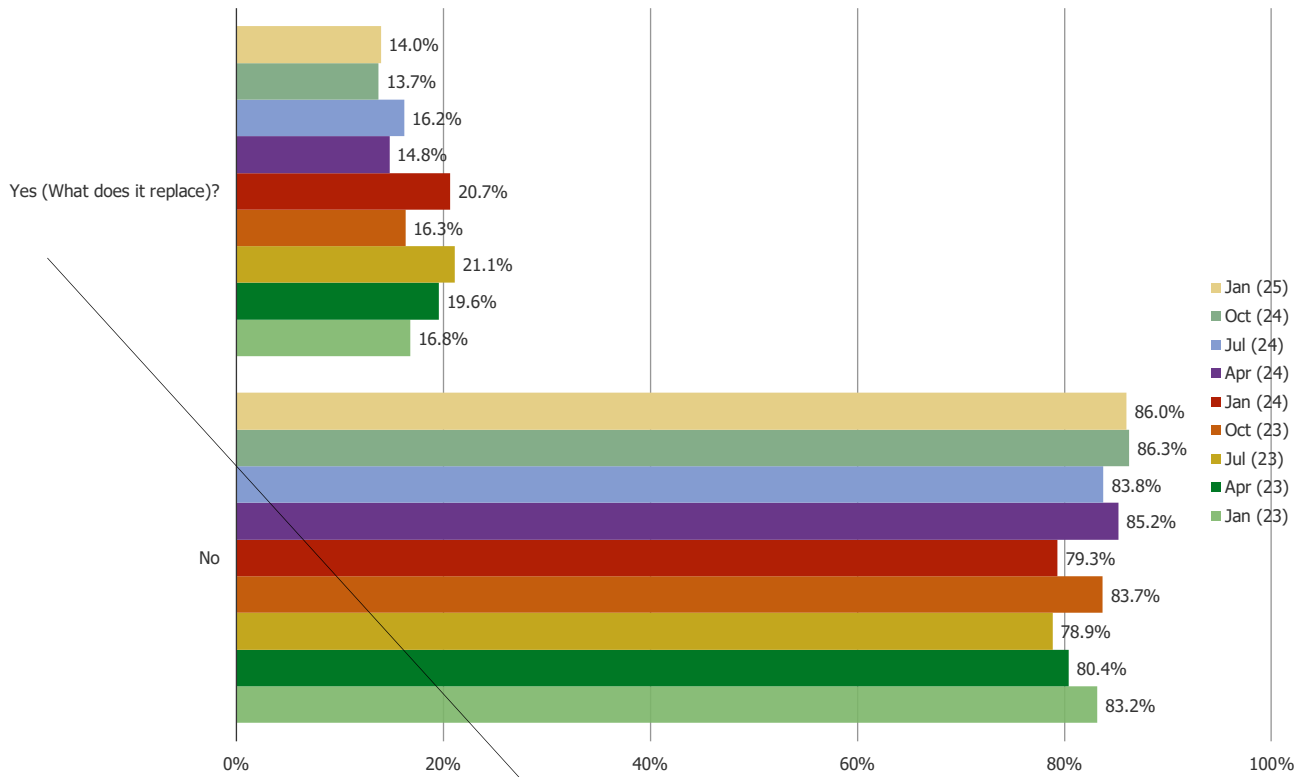


Temu

WHO MIGHT TEMU AND SHEIN BE DISRUPTING?

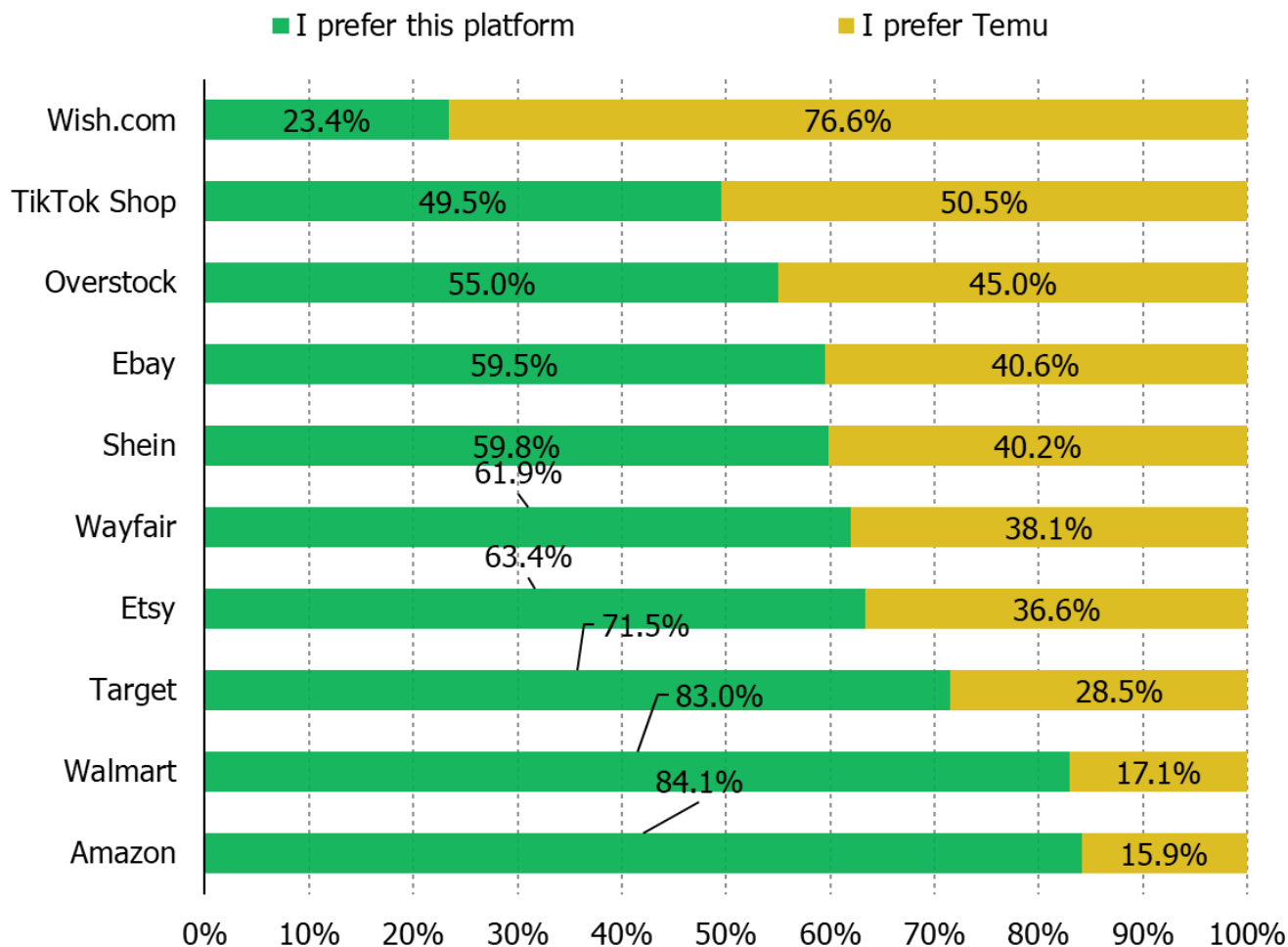
DO YOU FEEL YOUR SHOPPING ON TEMU REPLACES ANY OF YOUR SPENDING THAT WOULD TYPICALLY GO TO OTHER WEBSITES, APPS, OR STORES?

Posed to all respondents who have shopped Temu (N = 372)



HOW DO THE FOLLOWING COMPARE TO TEMU?

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



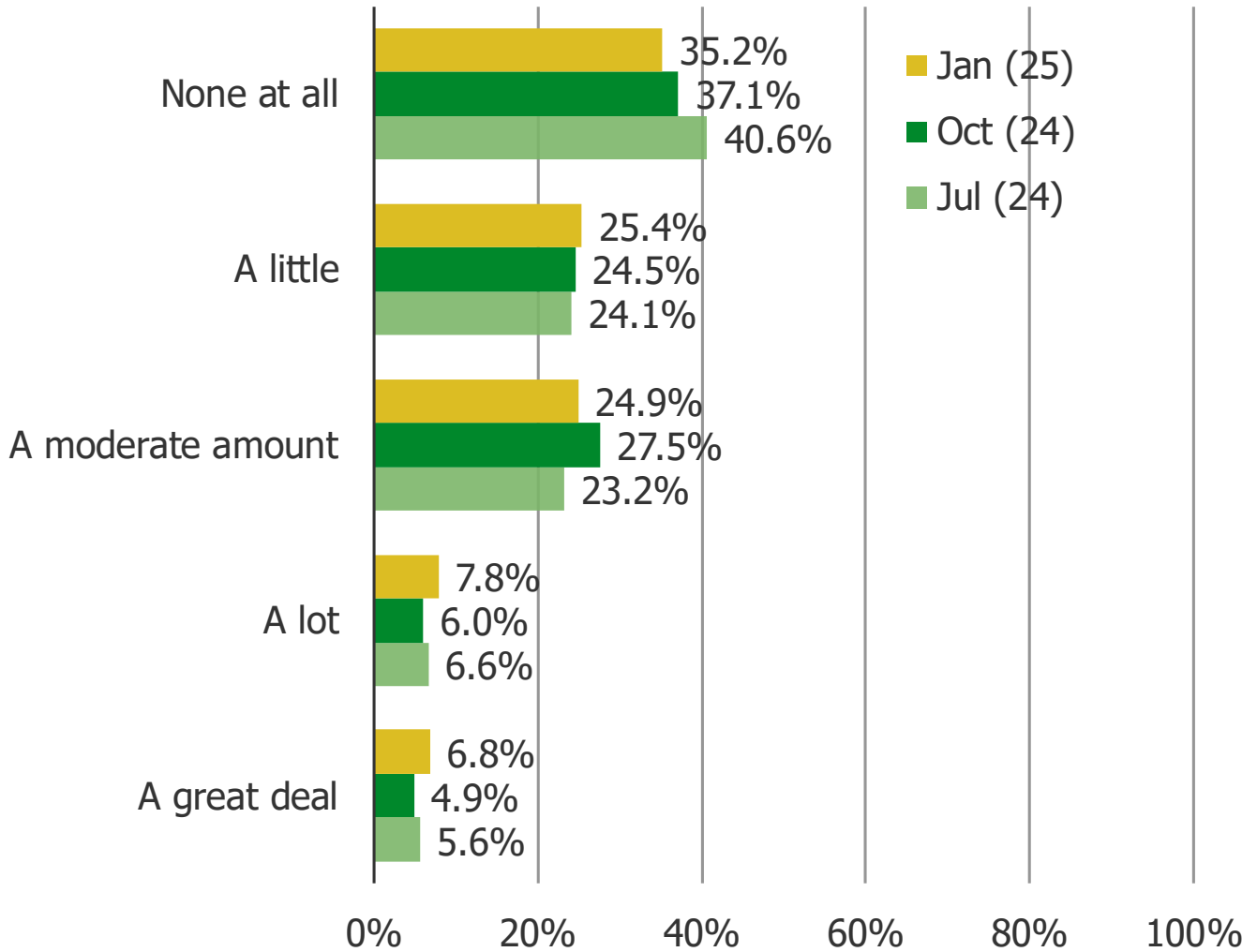
	N=
Amazon	359
Walmart	346
Target	270
Etsy	194
Wayfair	155
Shein	194
Ebay	254
Overstock	120
TikTok Shop	107
Wish.com	141

Temu

AMAZON COMPETING WITH TEMU (RE-FLAGGING FROM ONLINE RETAILERS SURVEY REPORT)

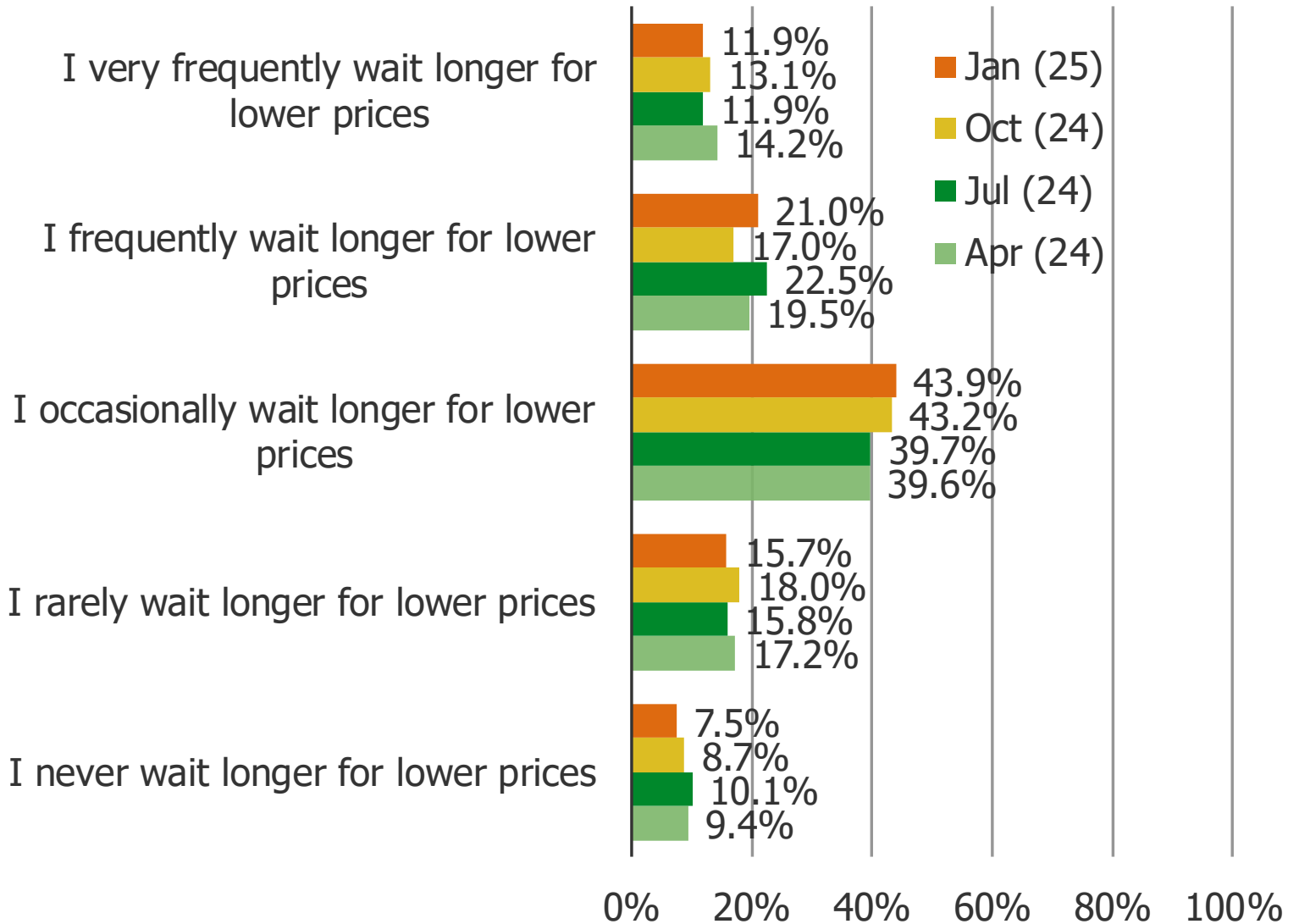
HOW MUCH USE DO YOU HAVE IN GENERAL FOR WEBSITES OR APPS THAT SELL CHEAP GOODS AND SHIP FROM WAREHOUSES IN CHINA DIRECTLY TO YOU IN THE US?

Posed to all respondents



WHEN YOU SHOP ONLINE, HOW DO YOU THINK ABOUT THE TRADEOFF BETWEEN PRICE AND DELIVERY SPEED?

Posed to all respondents.

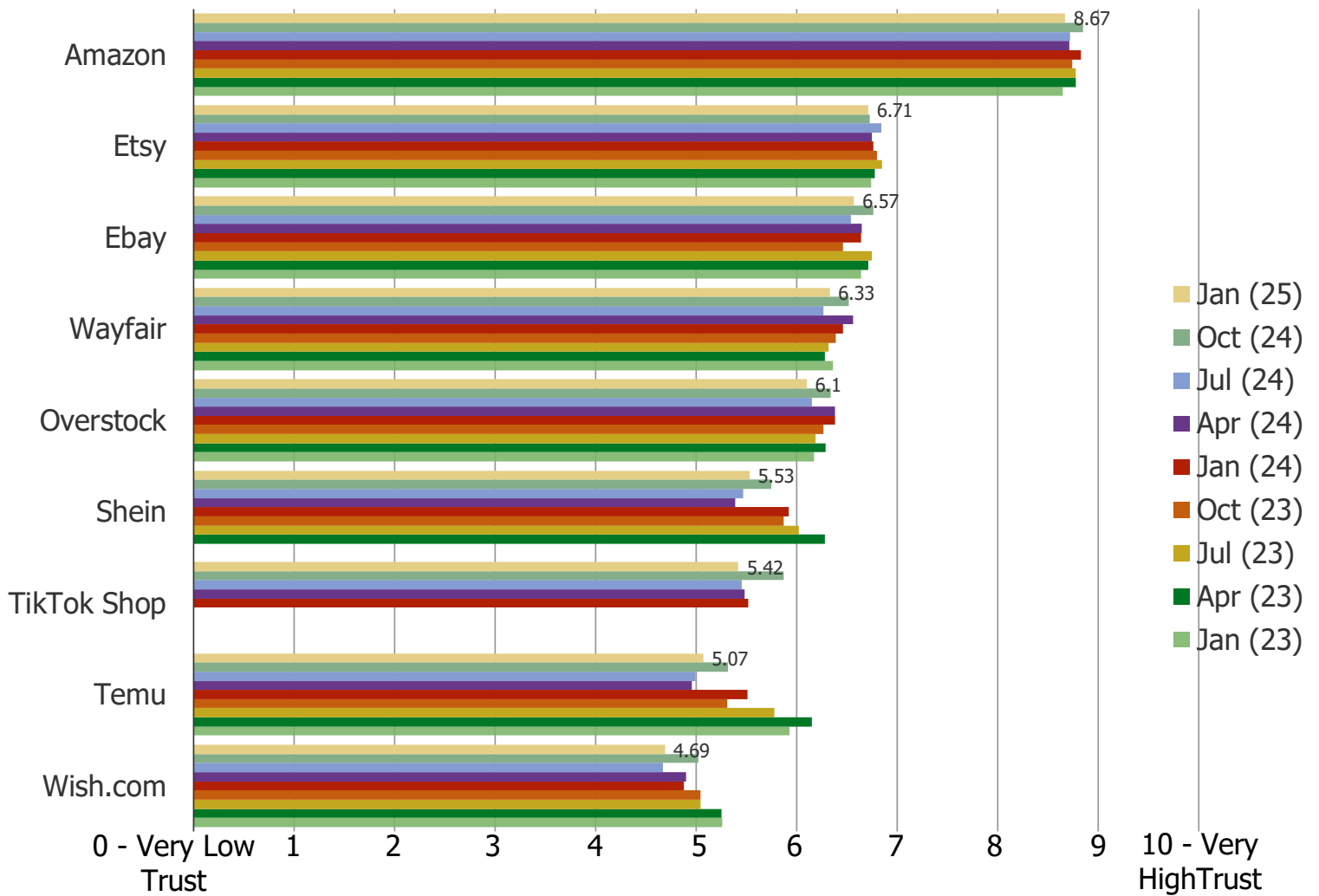


Temu

COMPETITIVE DYNAMICS

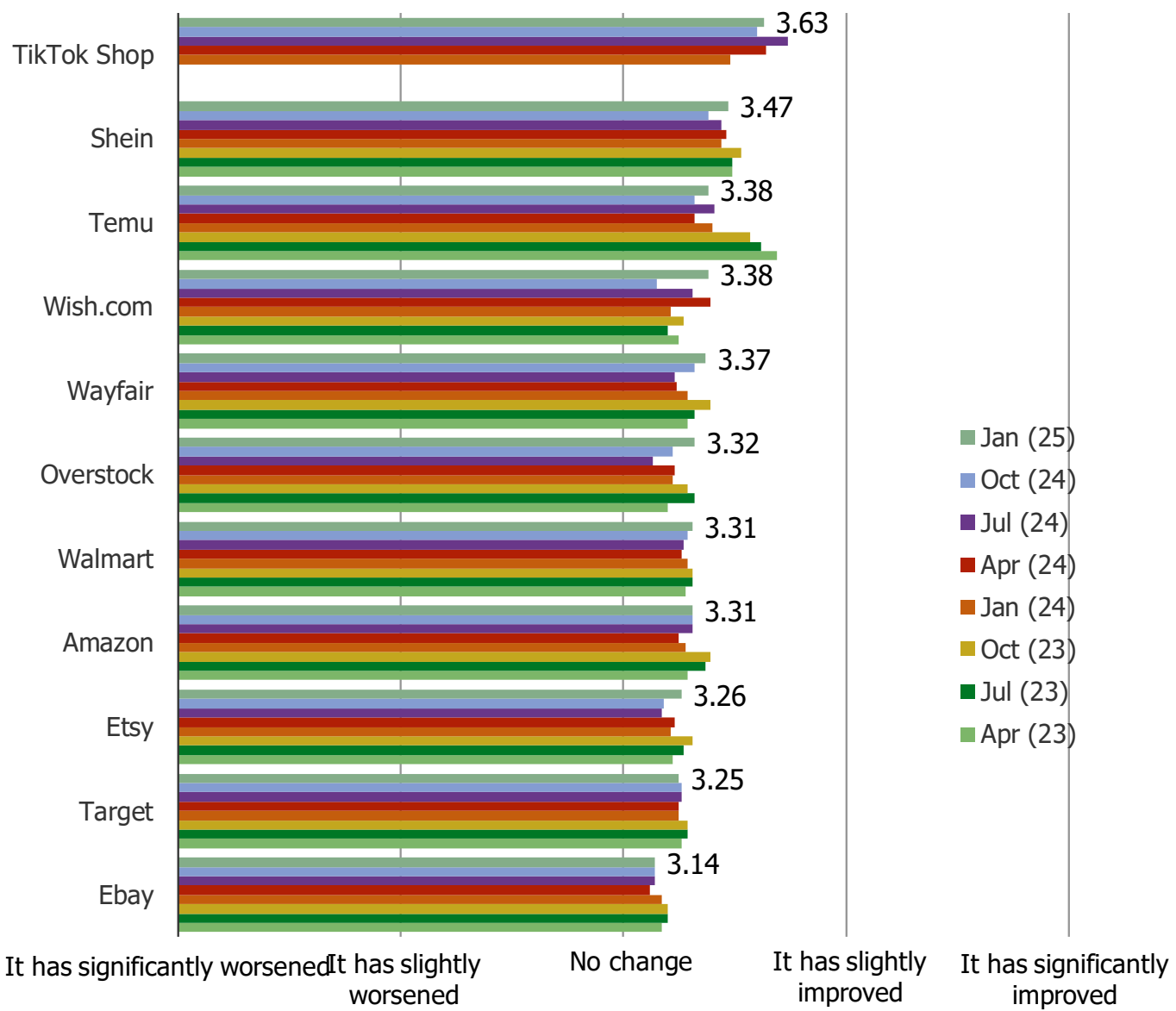
HOW MUCH TRUST DO YOU HAVE IN THE FOLLOWING?

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



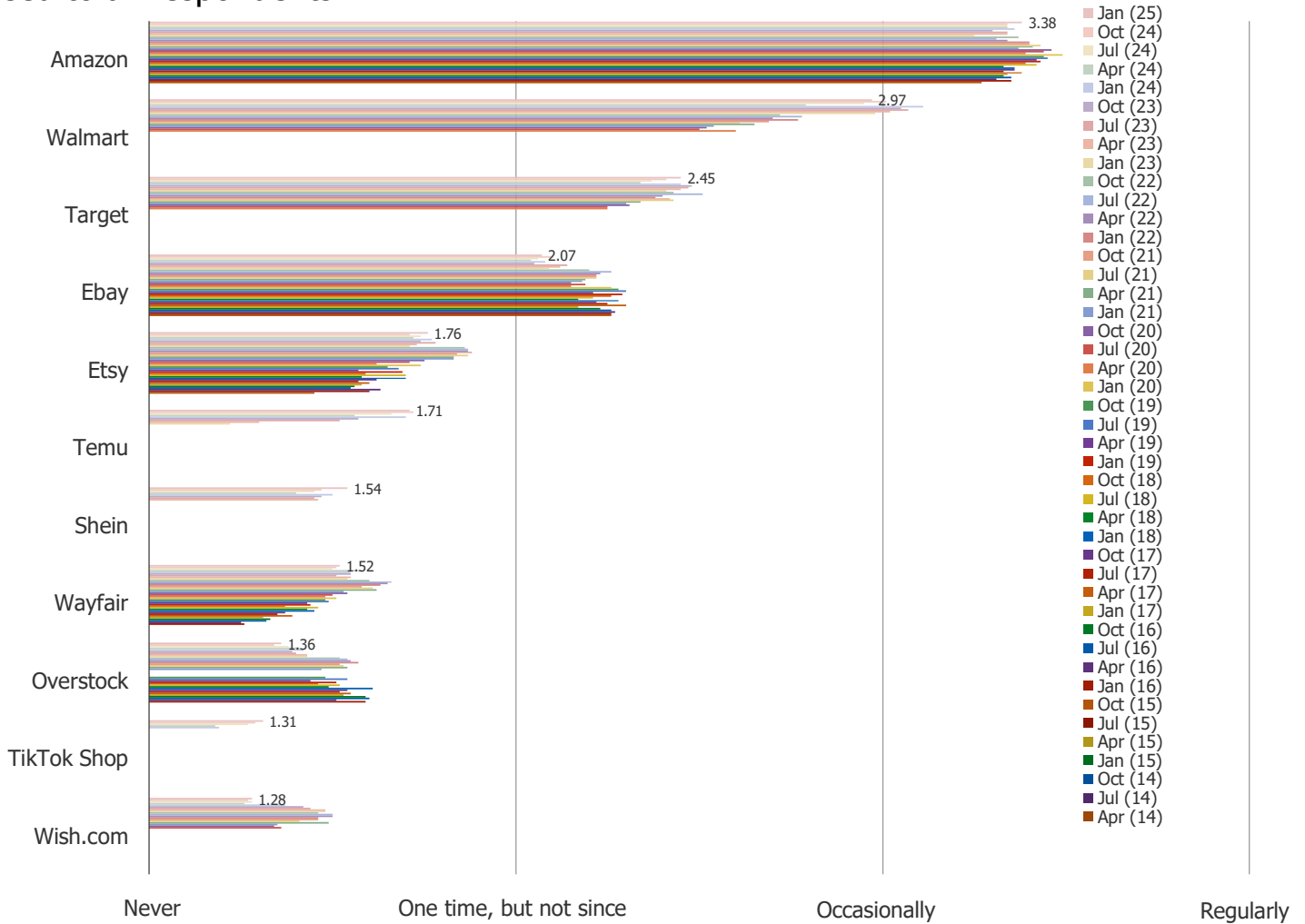
HAVE YOU NOTICED ANY CHANGES TO HOW GOOD THE SALES / PROMOTIONAL OFFERS ARE ON THESE PLATFORMS RECENTLY?

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



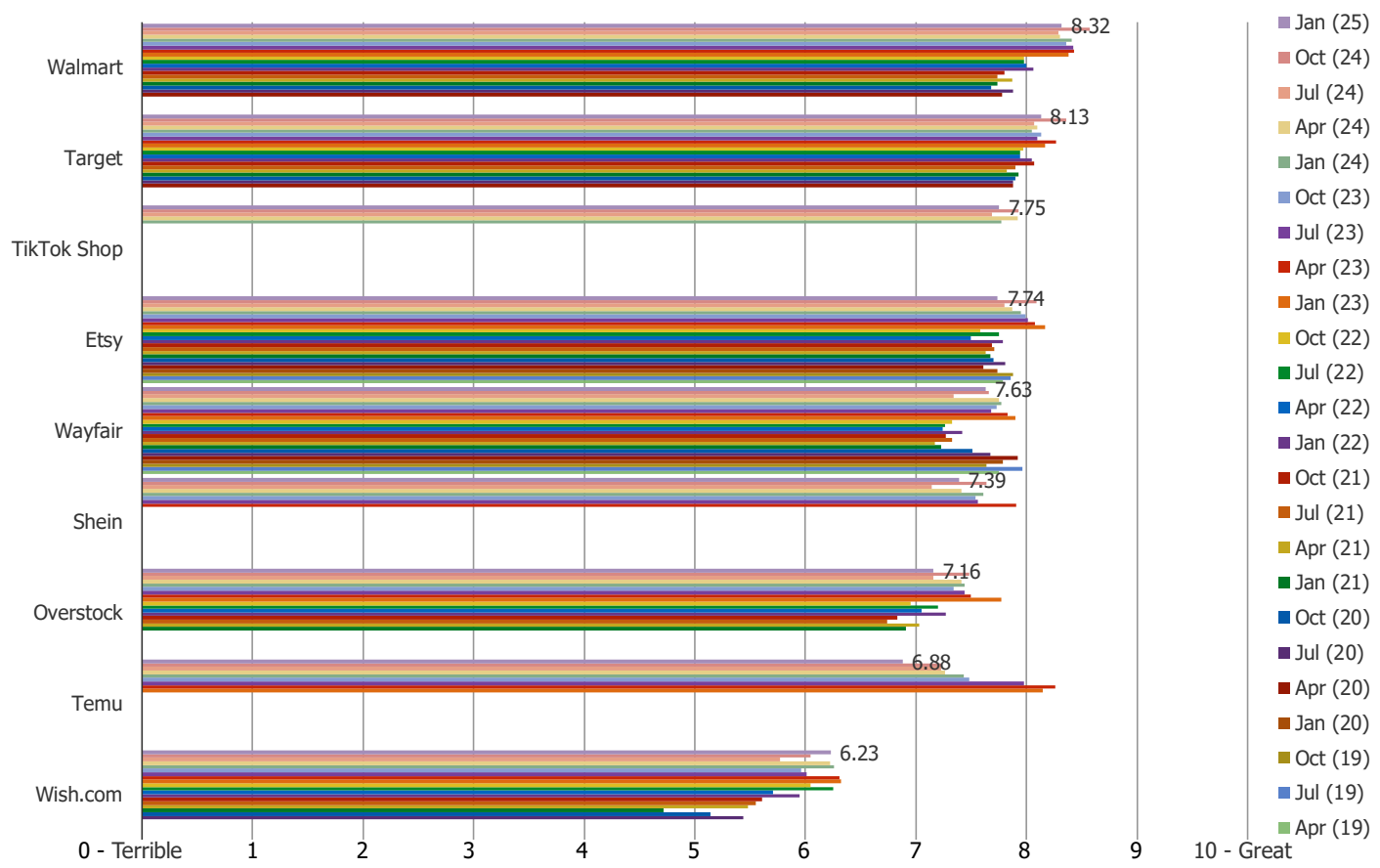
WHICH OF THE FOLLOWING BEST DESCRIBES HOW OFTEN YOU PURCHASE ITEMS THROUGH EACH OF THE FOLLOWING WEBSITES/APPS?

Posed to all respondents



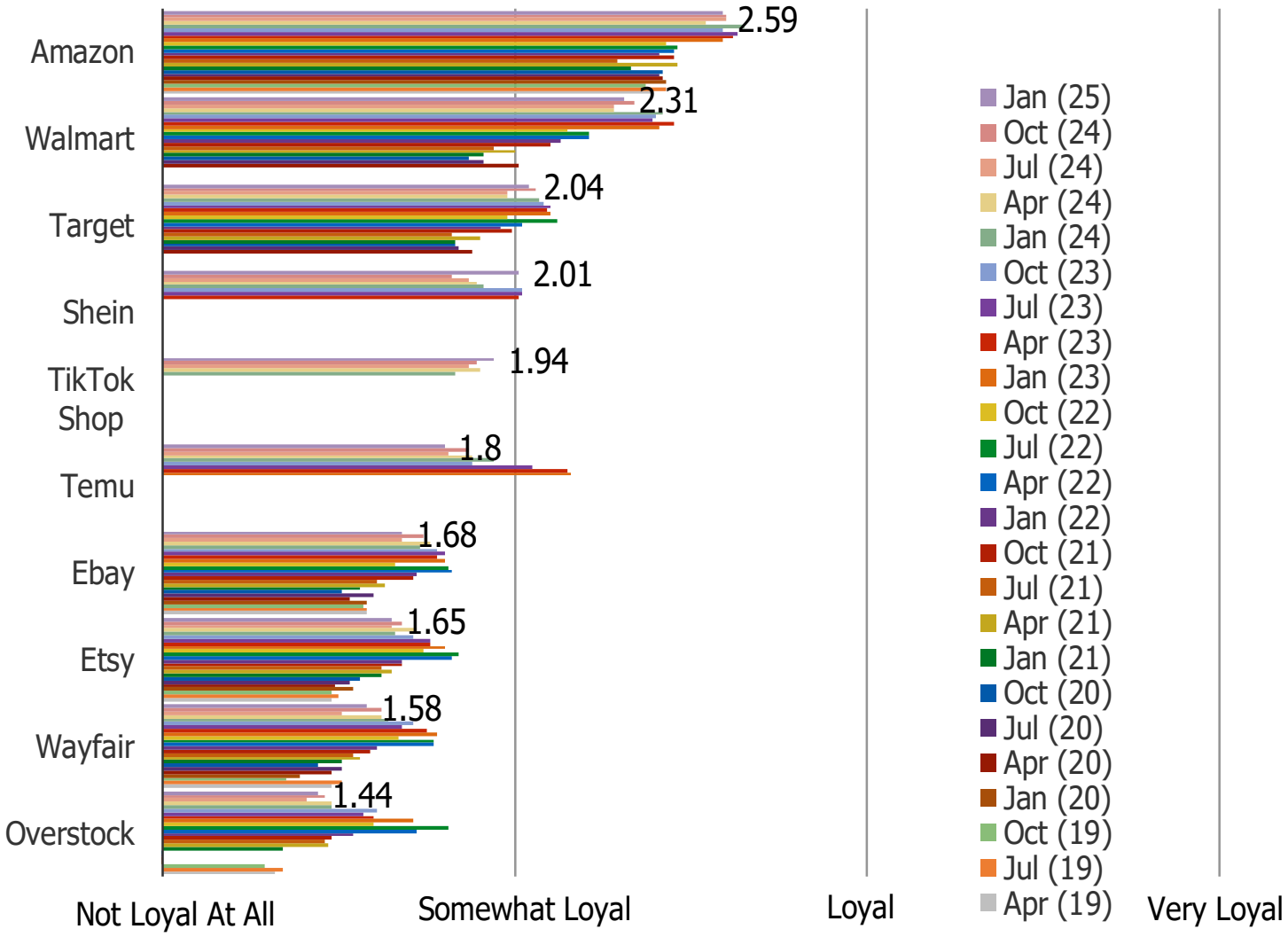
HOW DO YOU FIND THE SHIPPING EXPERIENCE WITH THIS APP/SITE?

Posed to users of each site/app



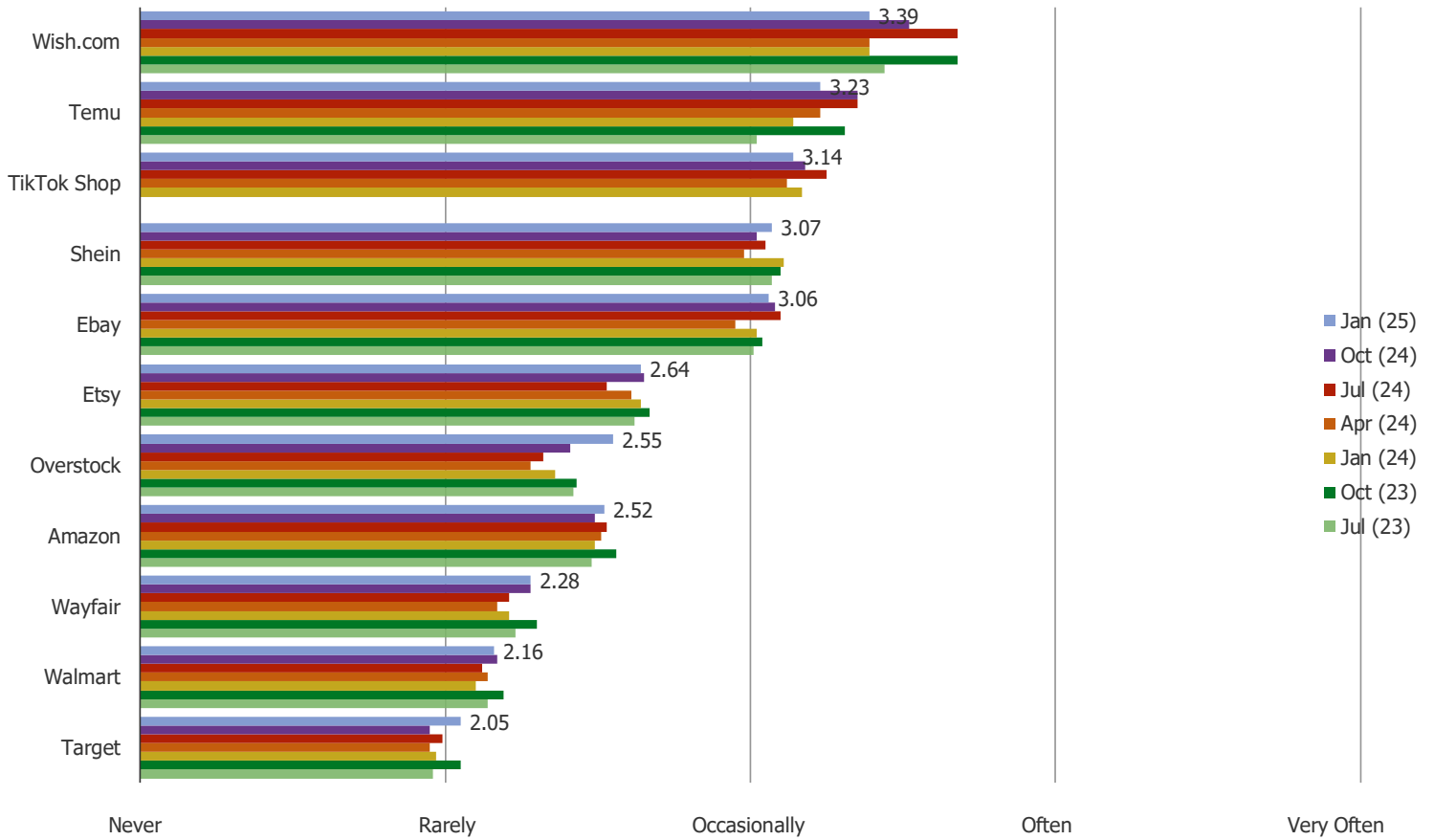
PLEASE RATE HOW LOYAL YOU ARE TO THIS APP/SITE FOR THE TYPES OF ITEMS YOU BUY FROM THEM:

Posed to users of each site/app



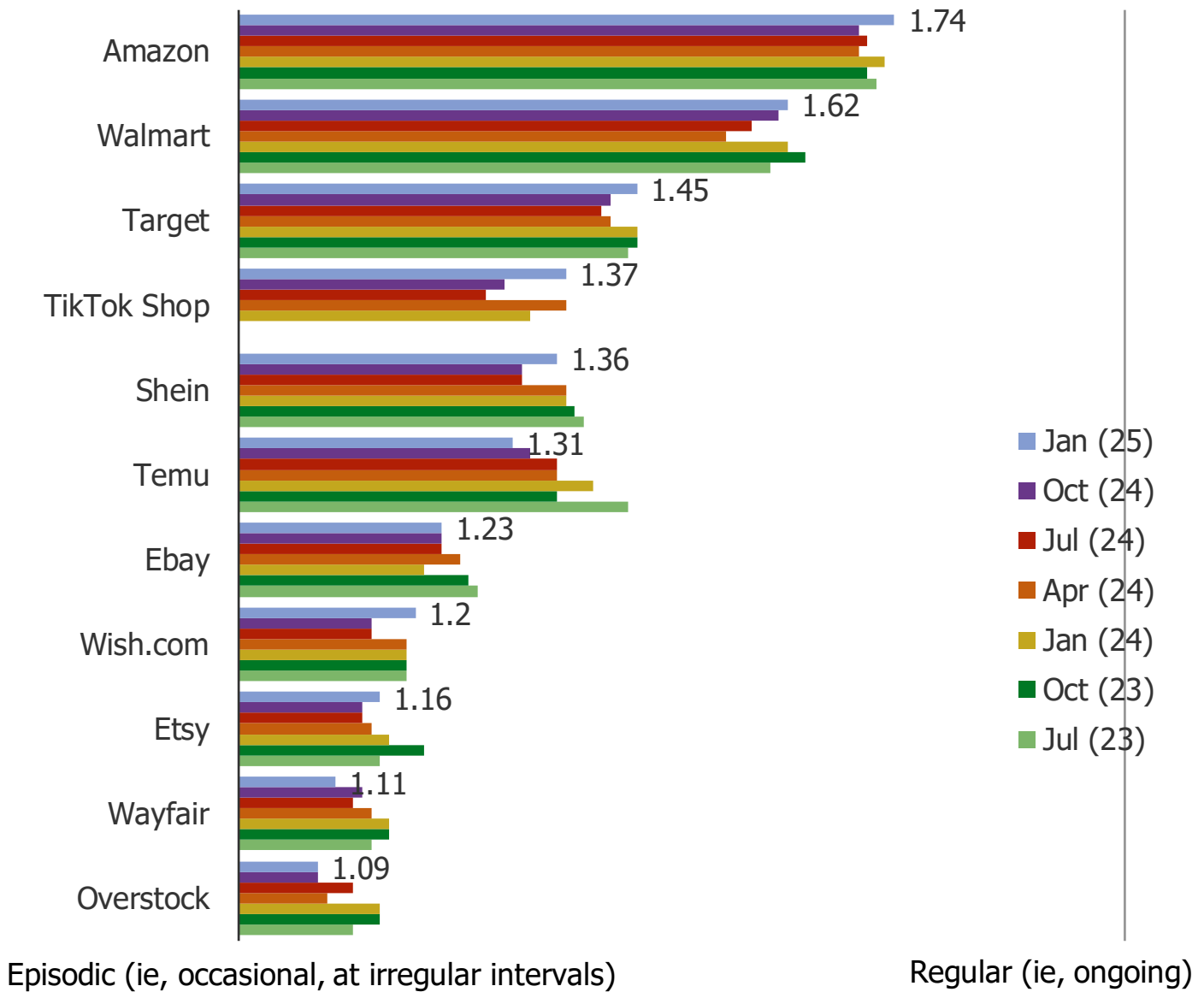
HOW OFTEN DO YOU THINK THERE ARE COUNTERFEIT / FAKE ITEMS BEING SOLD ON THIS PLATFORM?

Posed to all respondents who shop the below.



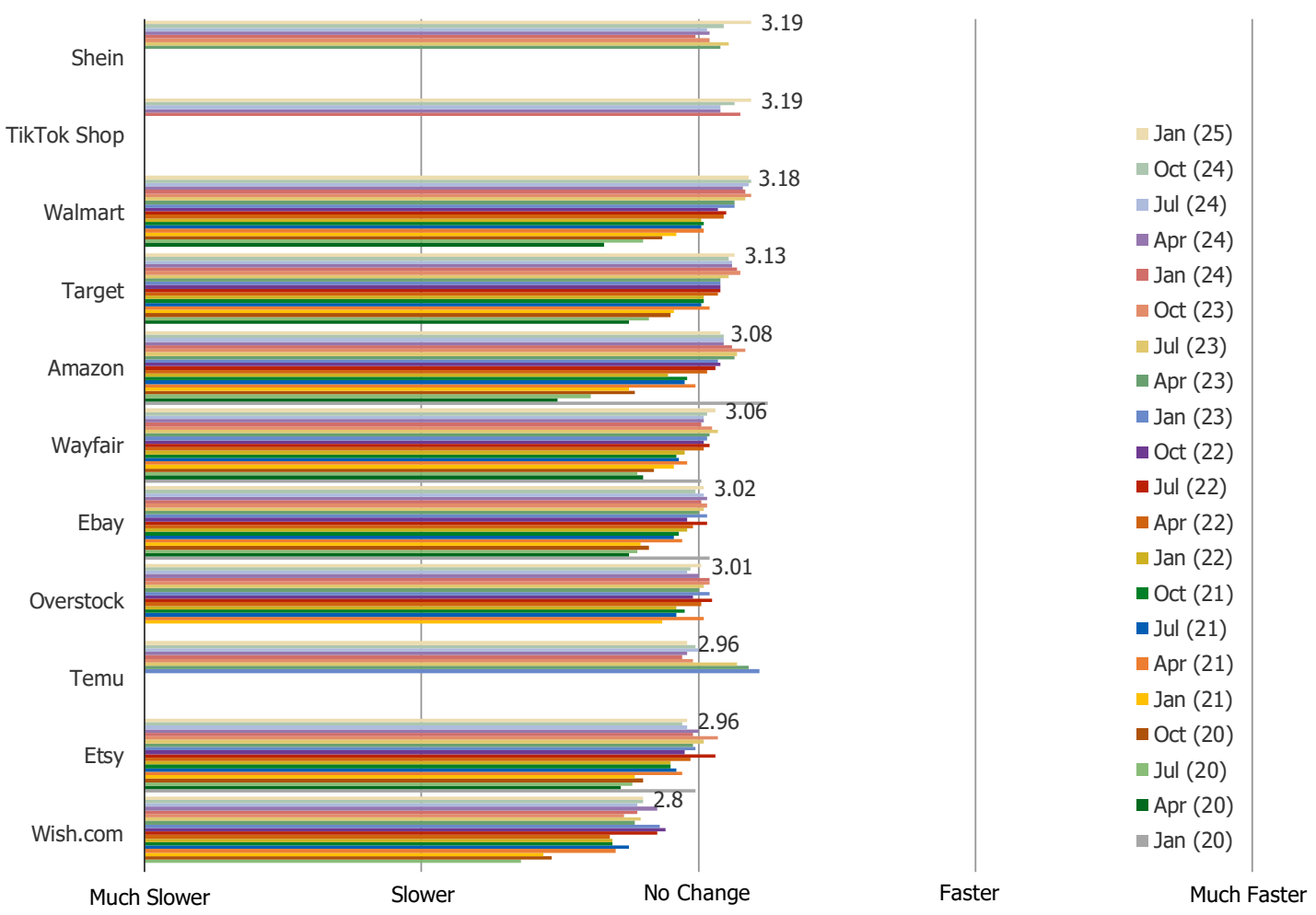
WOULD YOU DESCRIBE YOUR USAGE OF THIS PLATFORM AS REGULAR (IE, ONGOING) OR EPISODIC (OCCASIONAL, AT IRREGULAR INTERVALS)

Posed to all respondents who shop the below.



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

Posed to users of each site/app.

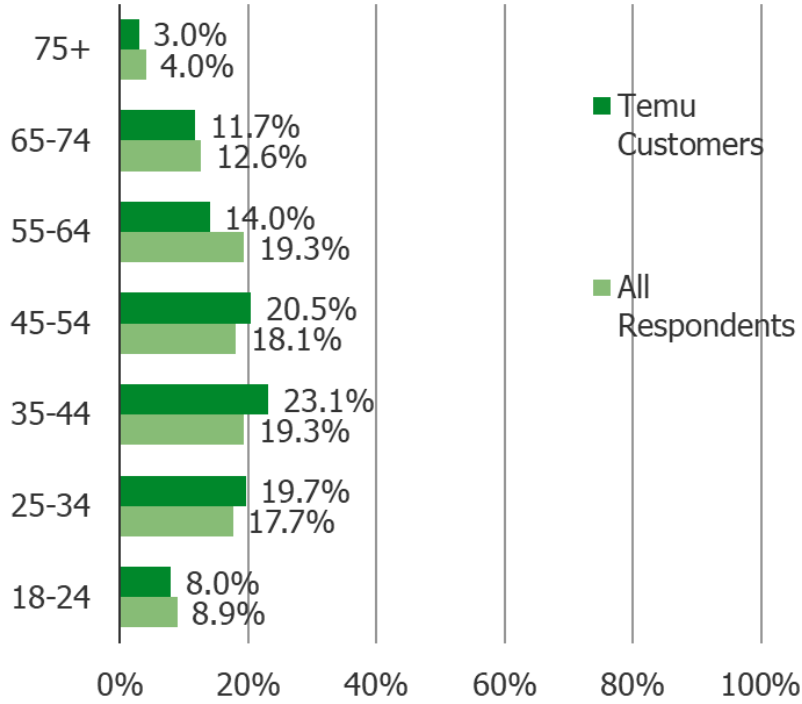


Temu

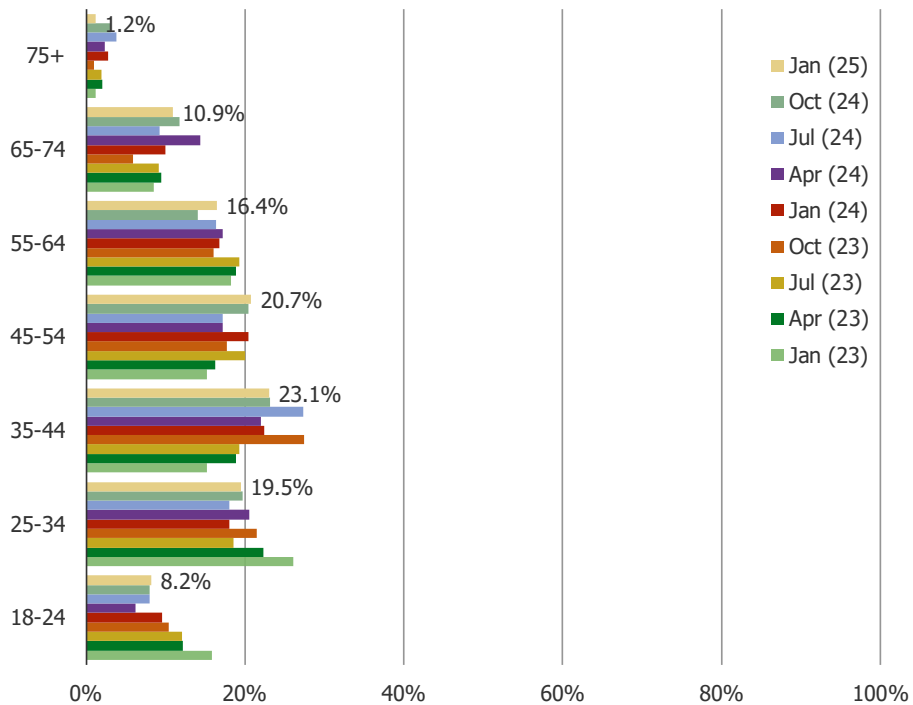
TEMU CUSTOMER DEMOGRAPHICS

TEMU CUSTOMERS - AGE

All respondents vs. respondents who shop **Temu regularly or occasionally**. (N= 264)

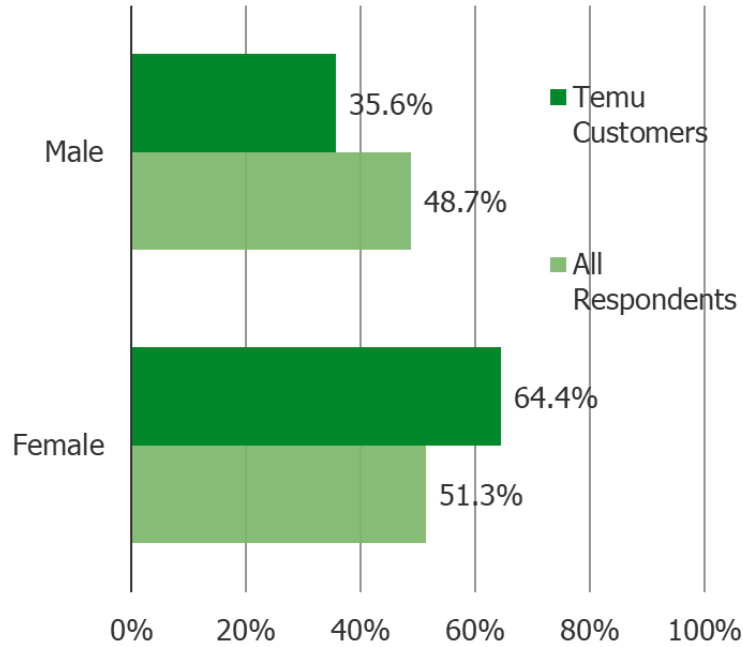


Time series (Regular or occasional Temu Customers)

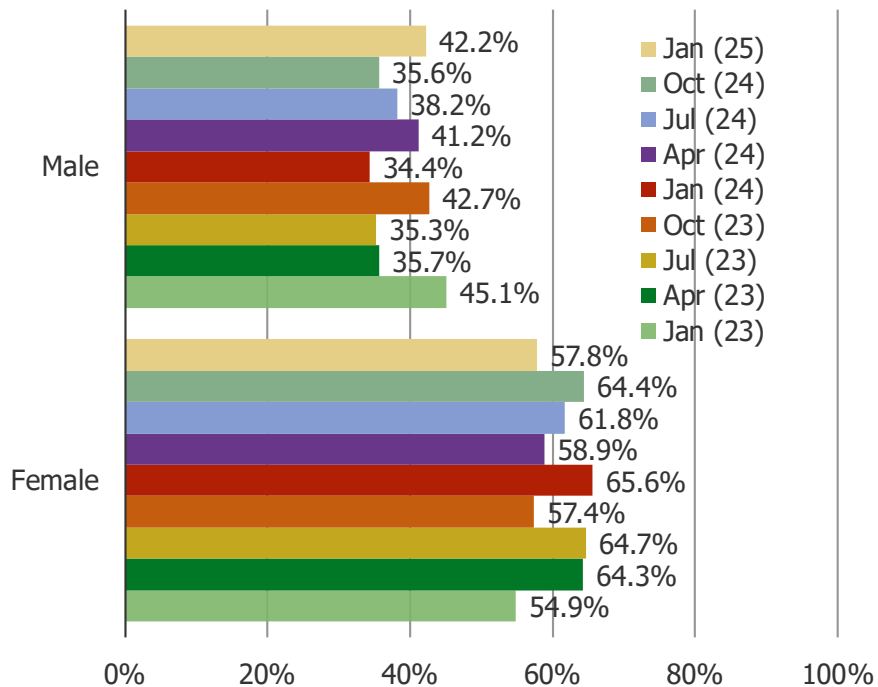


TEMU CUSTOMERS - GENDER

All respondents vs. respondents who shop **Temu regularly or occasionally**. (N= 264)

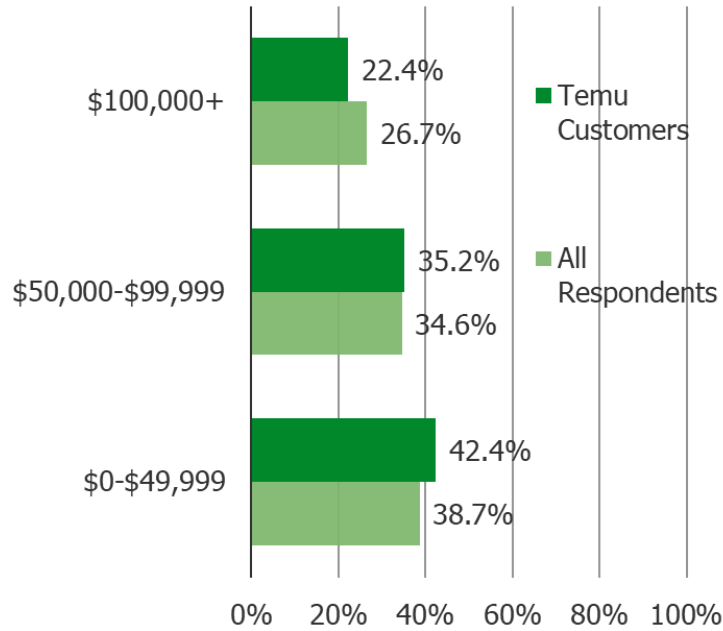


Time series (Regular or occasional Temu Customers)

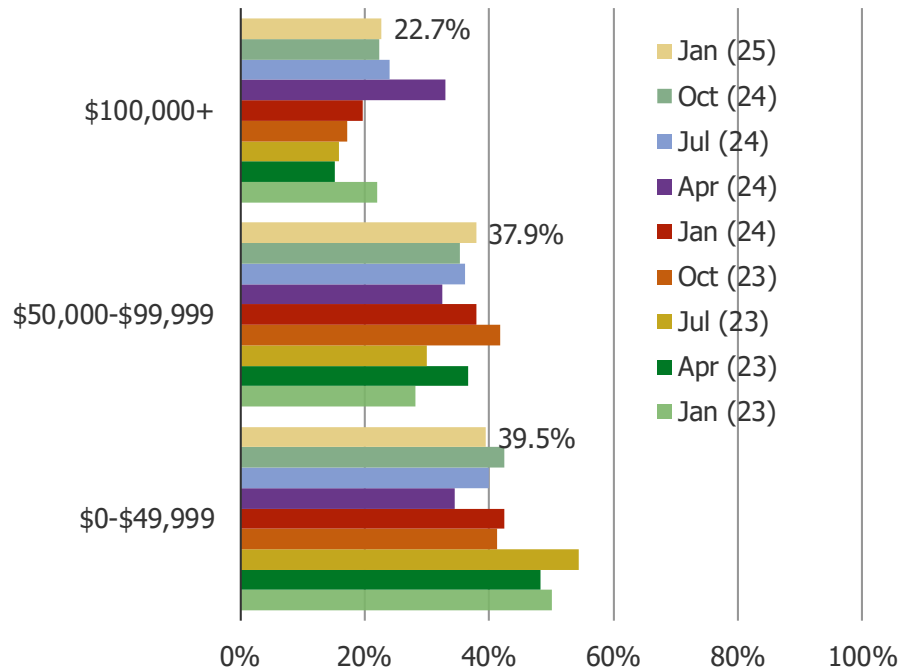


TEMU CUSTOMERS - INCOME

All respondents vs. respondents who shop **Temu regularly or occasionally**. (N= 264)



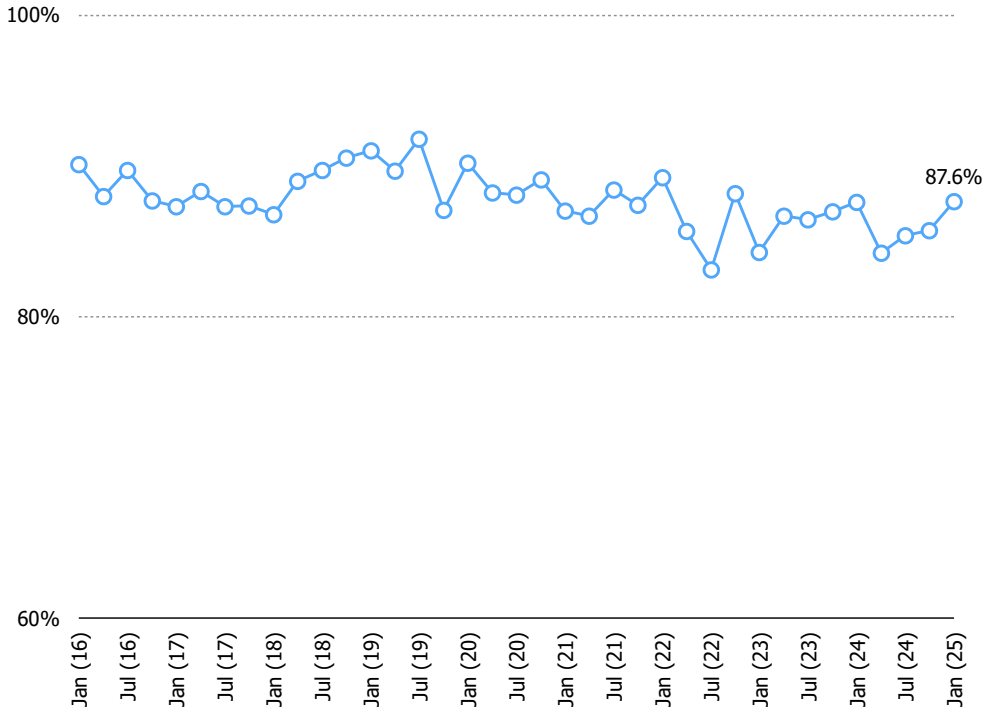
Time series (Regular or occasional Temu Customers)



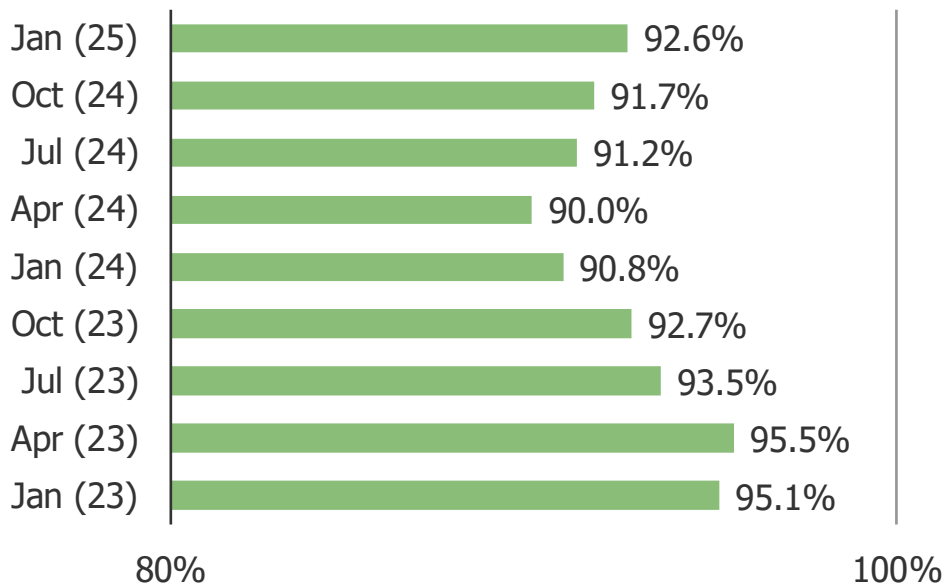
APPENDIX – AMZN <> TEMU

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

Posed to all respondents.

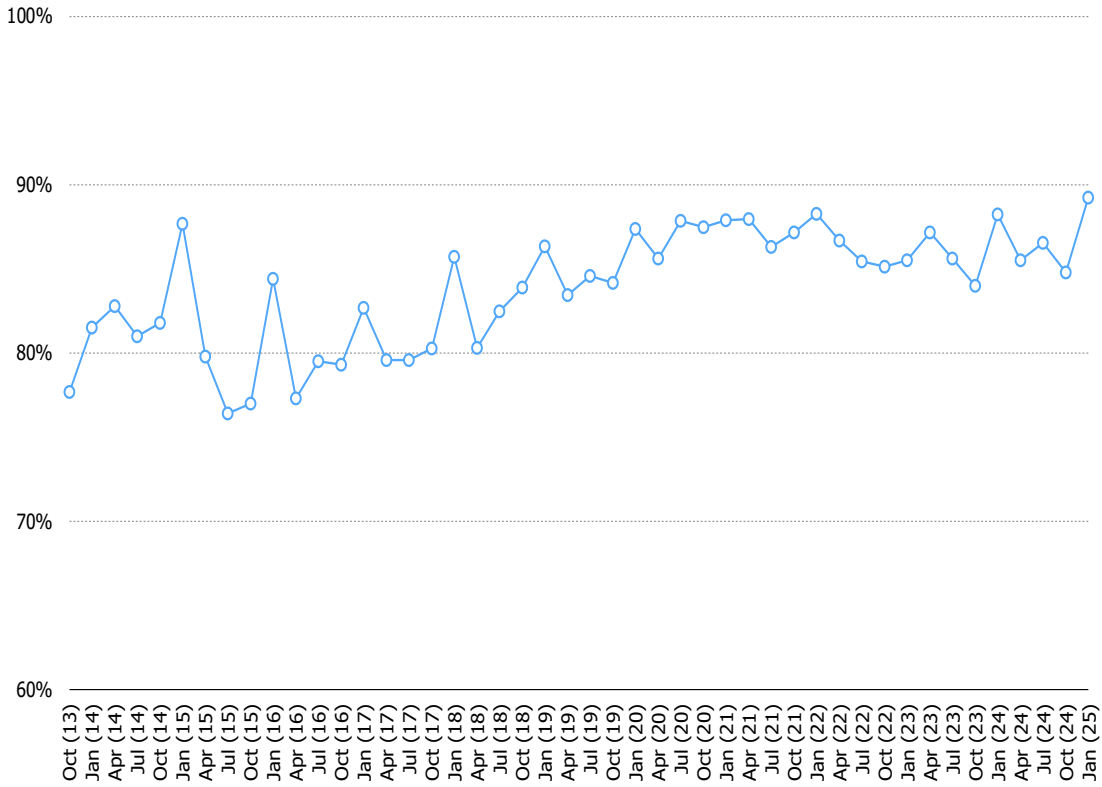


Posed to respondents who shop Temu regularly or occasionally...

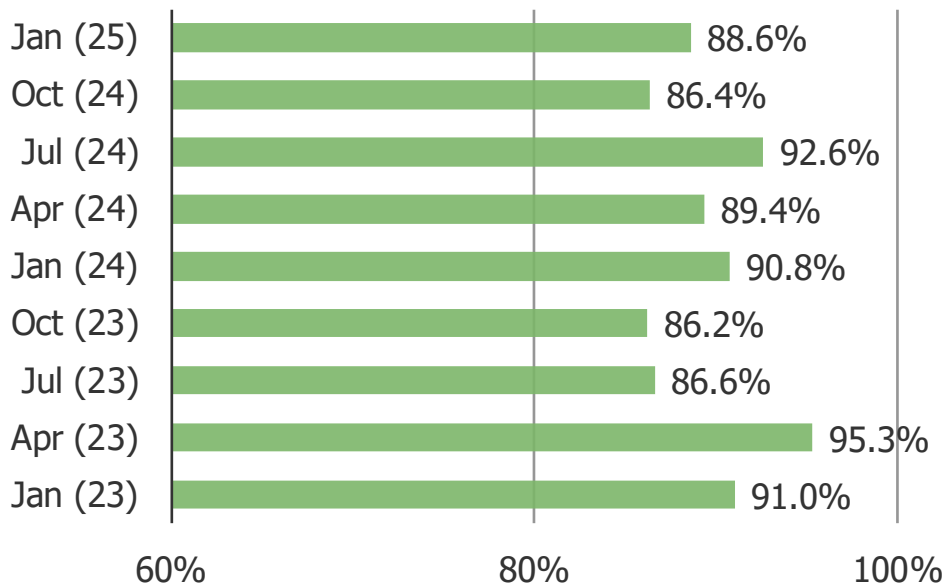


AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM AMAZON DURING THE PAST THREE MONTHS?

Posed to Amazon users

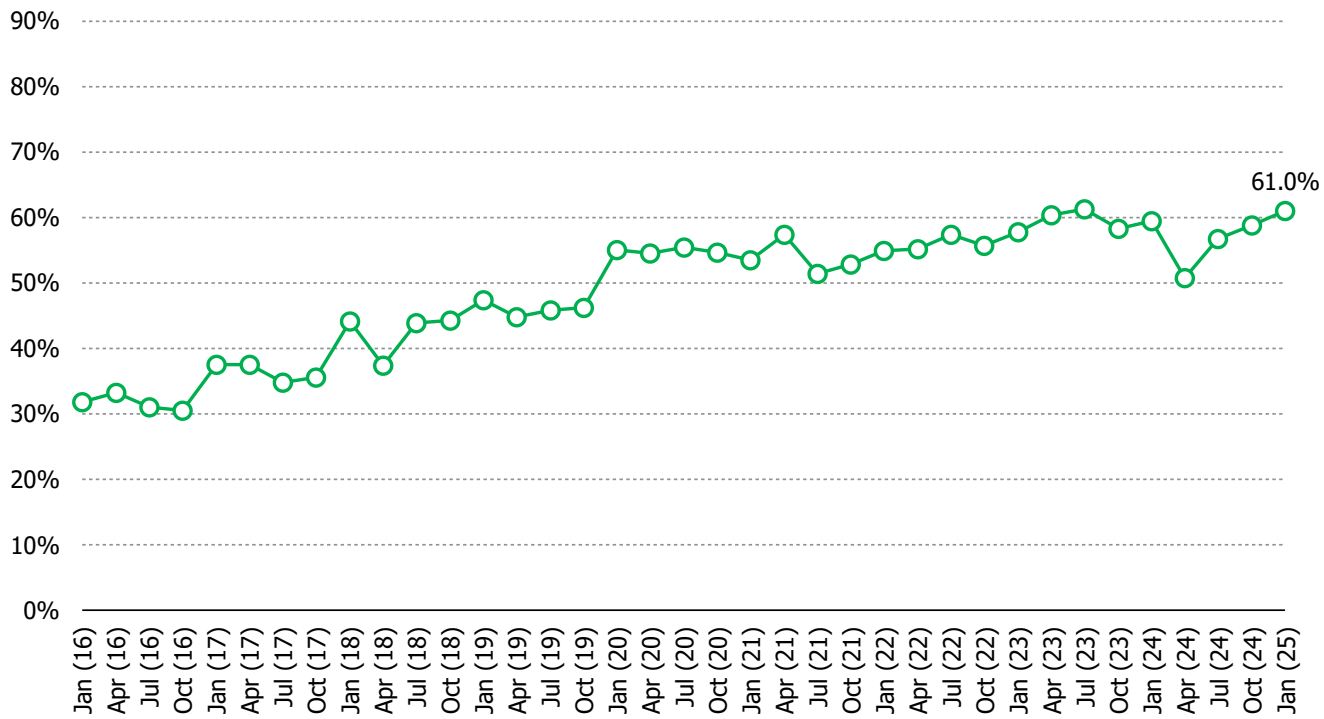


Posed to respondents who shop Temu regularly or occasionally and shop Amazon...

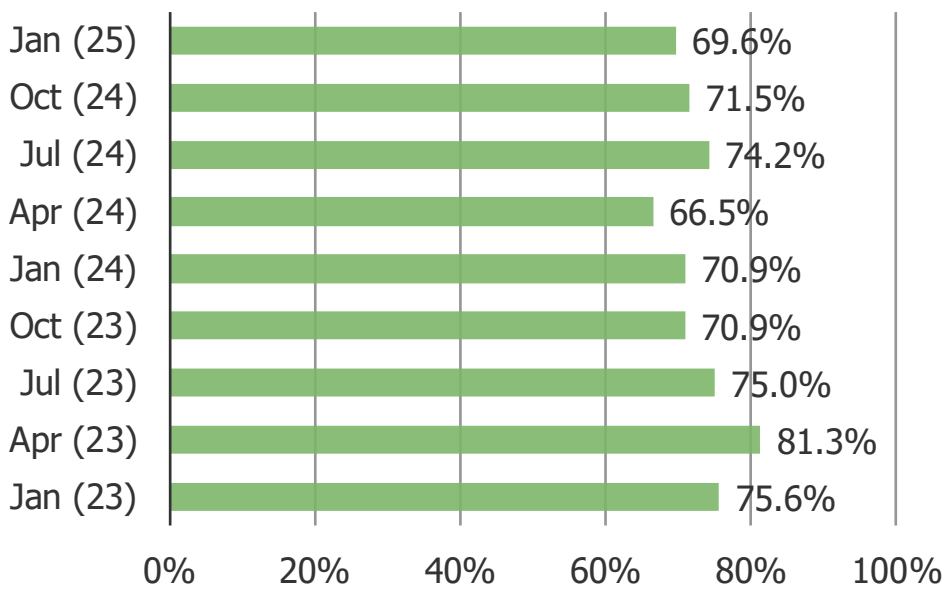


AMAZON USERS – HAVE YOU PURCHASED AN ITEM FROM THE AMAZON MOBILE APP IN THE PAST THREE MONTHS?

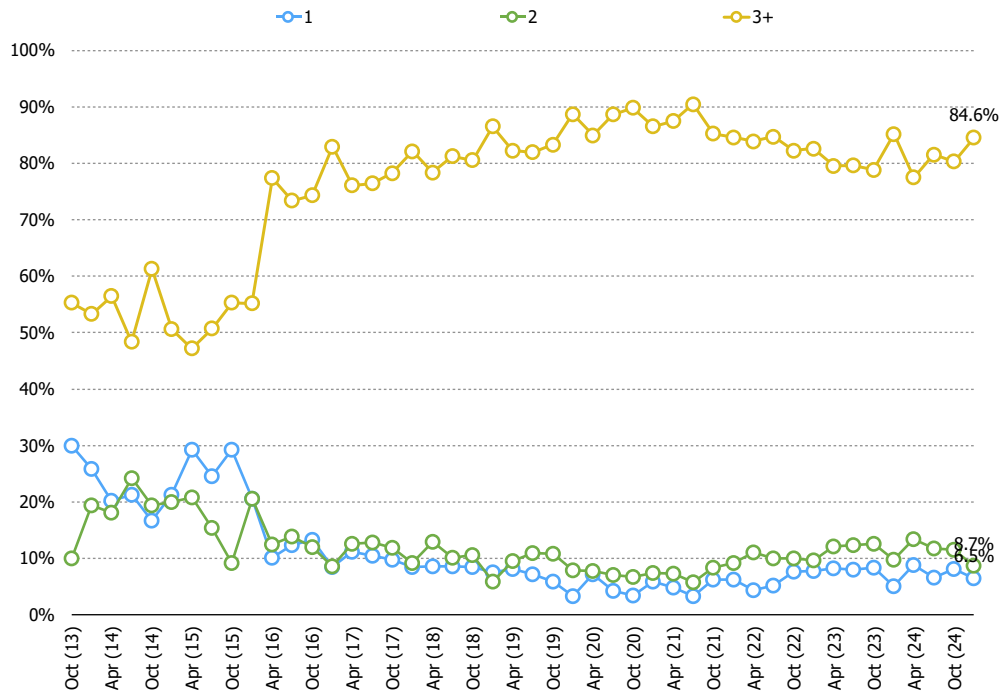
Posed to Amazon users



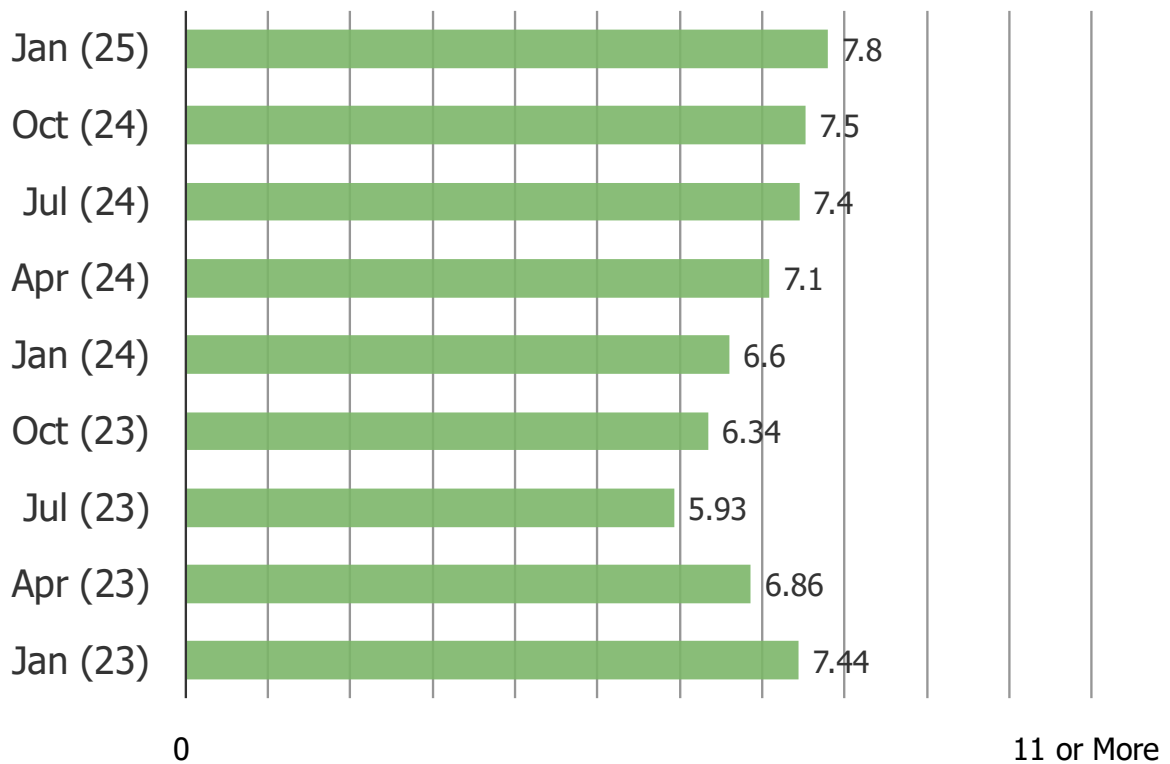
Posed to respondents who shop Temu regularly or occasionally and shop Amazon...



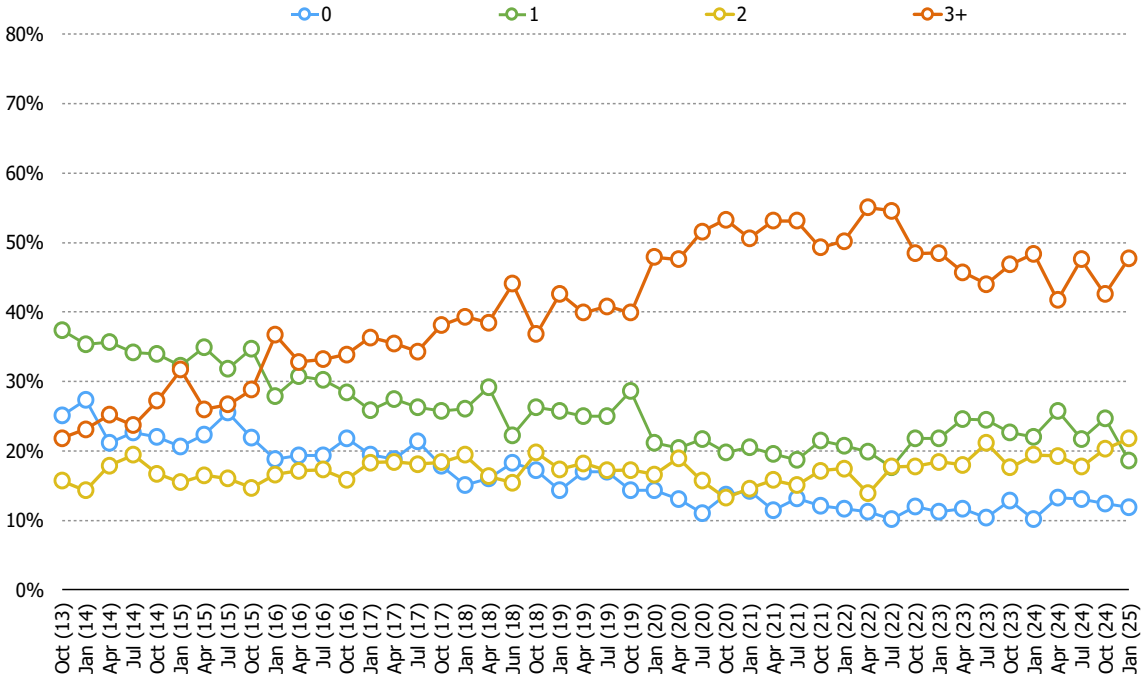
PURCHASED THROUGH AMAZON IN THE PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH AMAZON IN THE LAST THREE MONTHS?



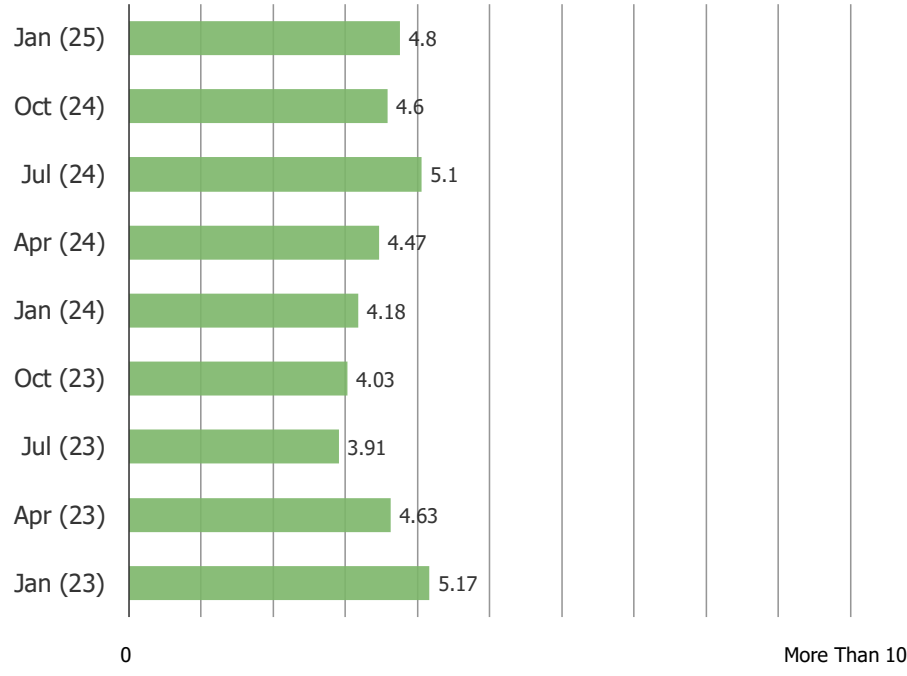
Posed to respondents who shop Temu regularly or occasionally and shop Amazon...



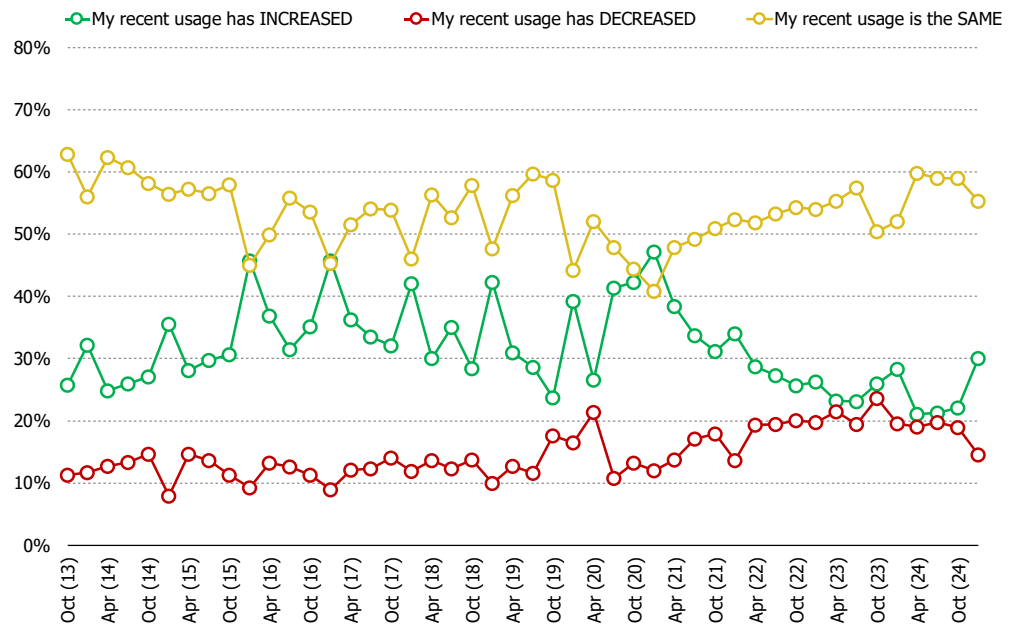
AMAZON USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH AMAZON A MONTH?



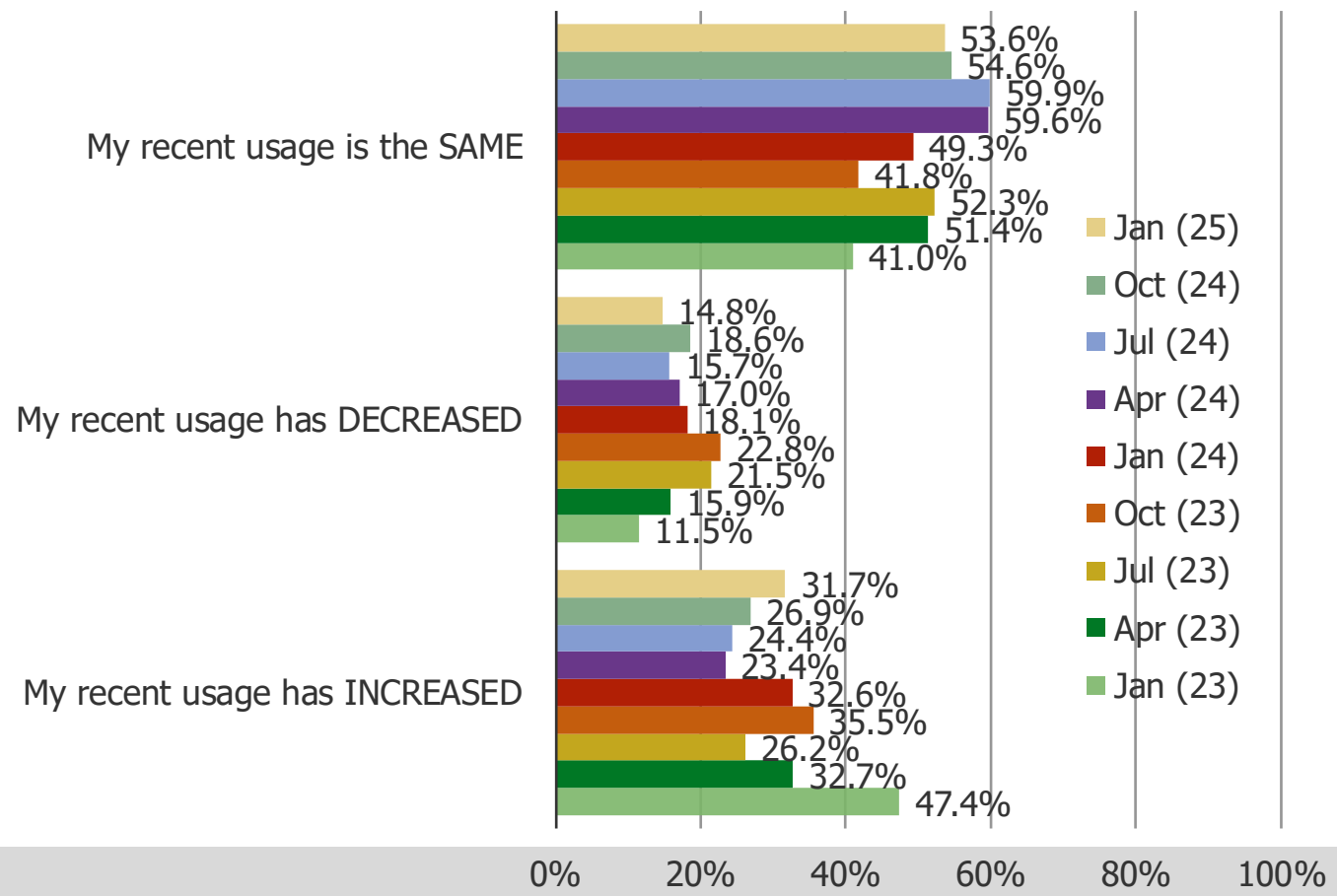
Posed to respondents who shop Temu regularly or occasionally and shop Amazon...



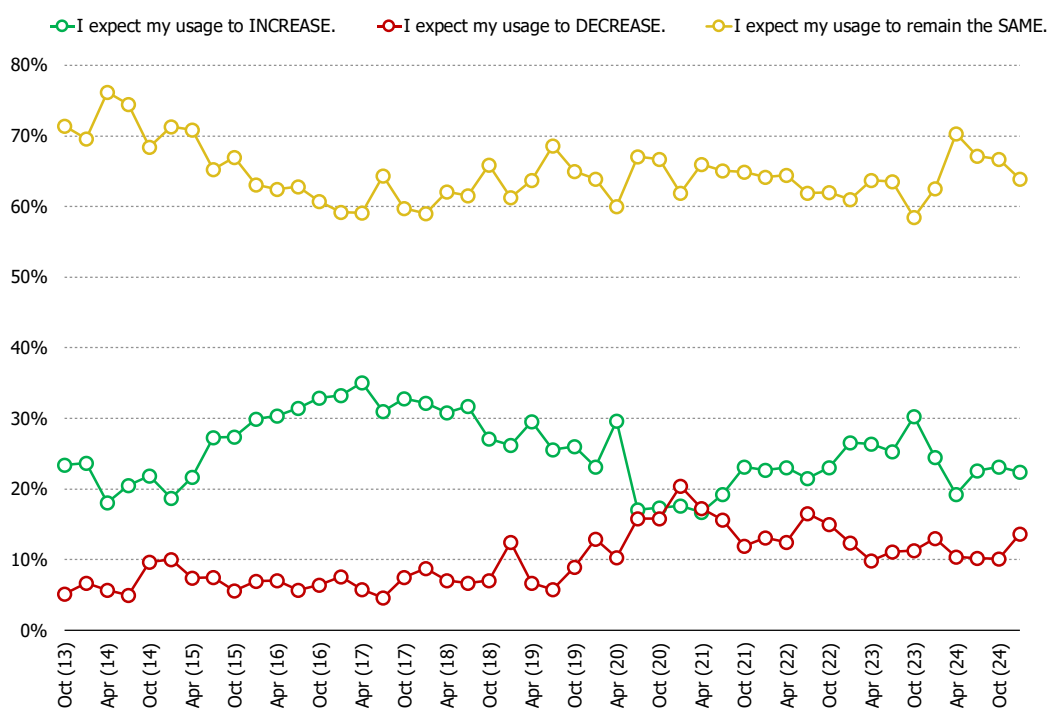
AMAZON USERS – RECENT USAGE



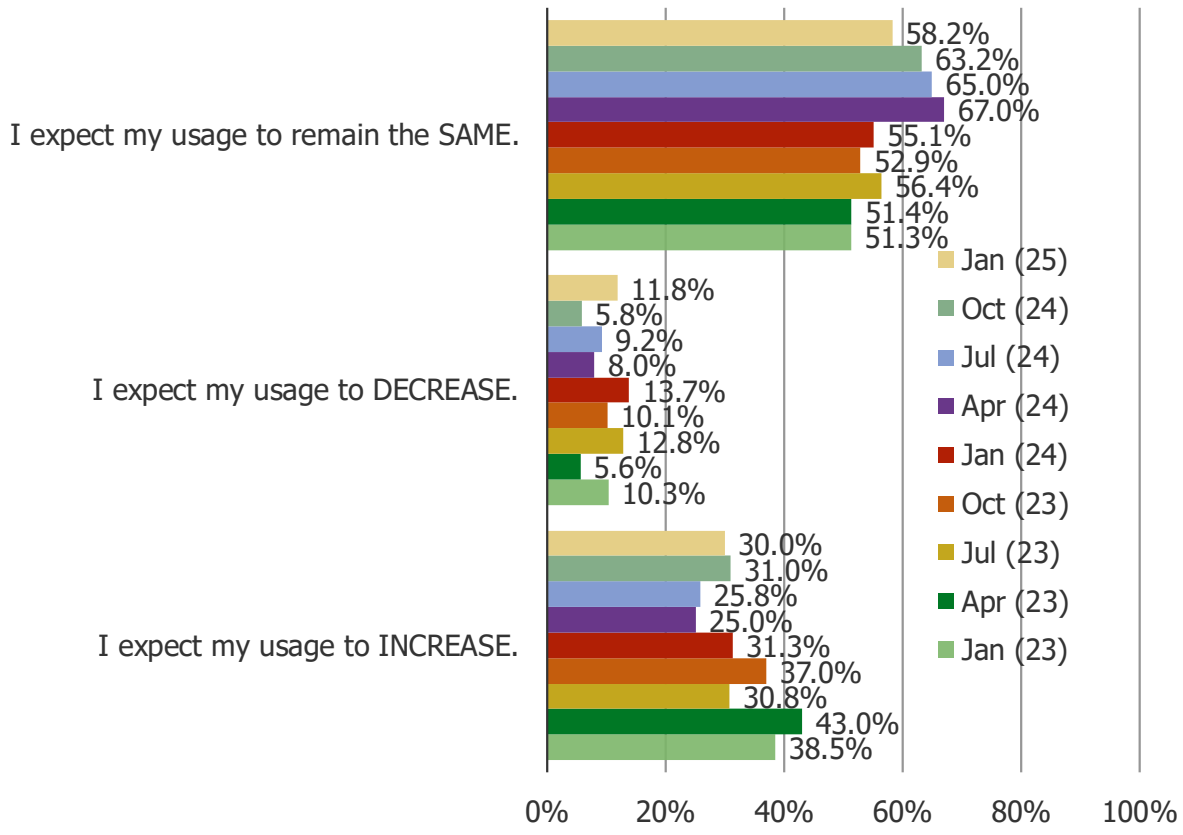
Posed to respondents who shop Temu regularly or occasionally and shop Amazon...



AMAZON USERS – EXPECTED USAGE

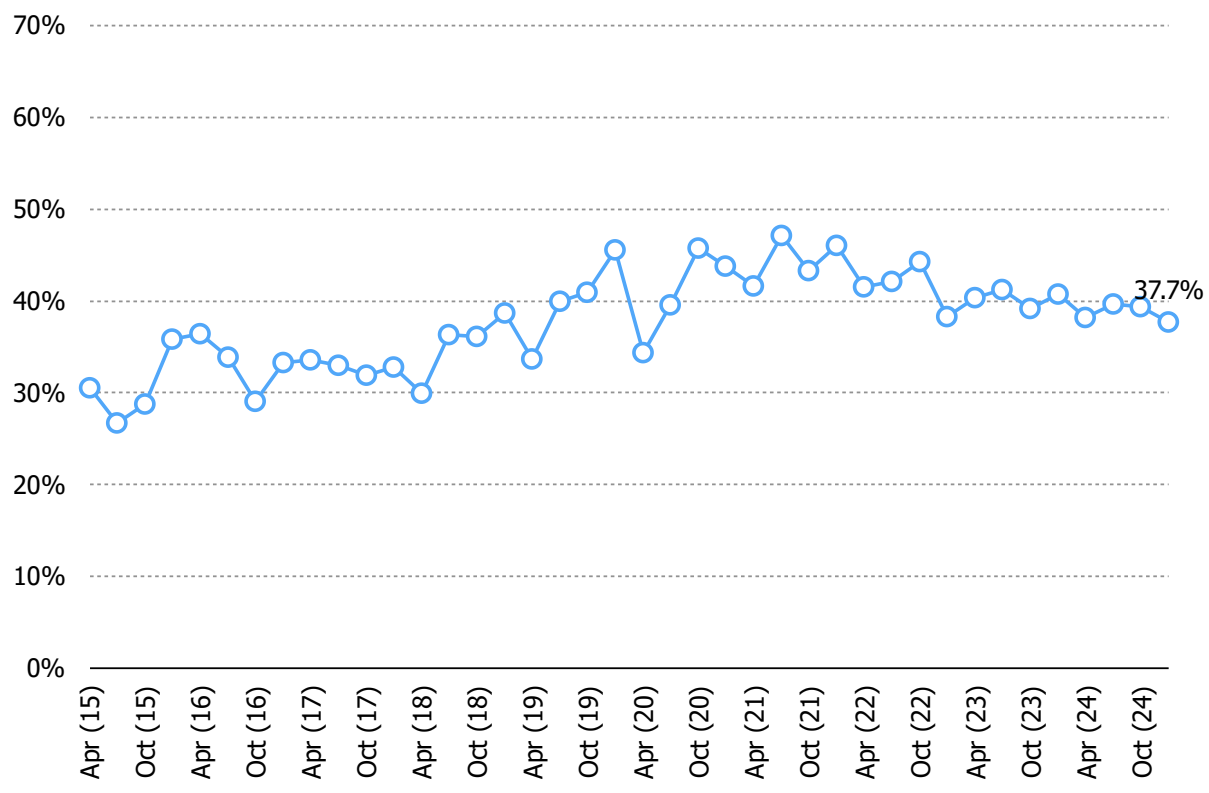


Posed to respondents who shop Temu regularly or occasionally and shop Amazon...

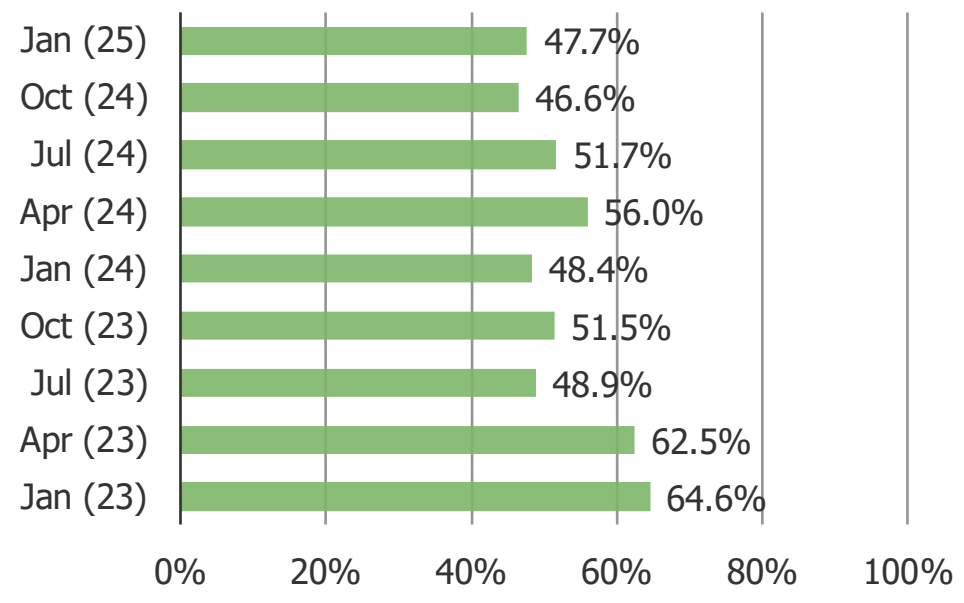


APPENDIX – ETSY <> TEMU

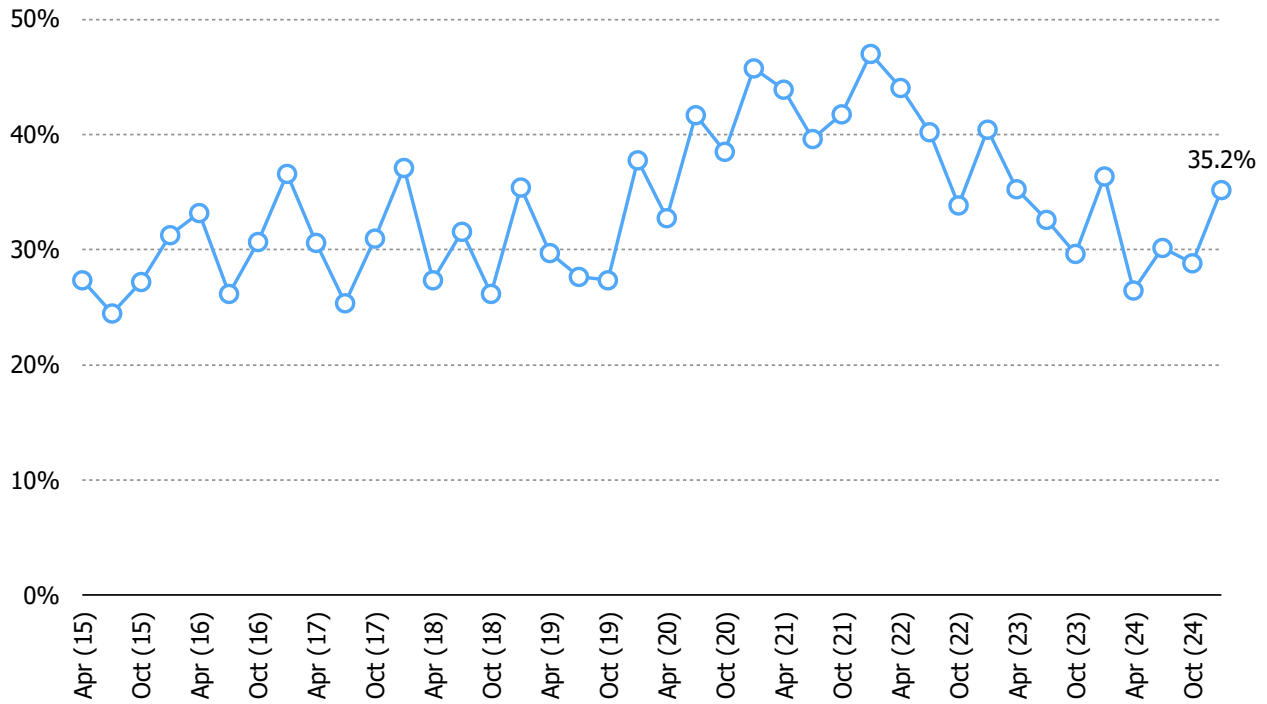
ALL RESPONDENTS – DO YOU EVER USE OR VISIT ETSY (EITHER THE WEBSITE ON YOUR COMPUTER OR THE APPLICATION ON YOUR MOBILE DEVICE)?



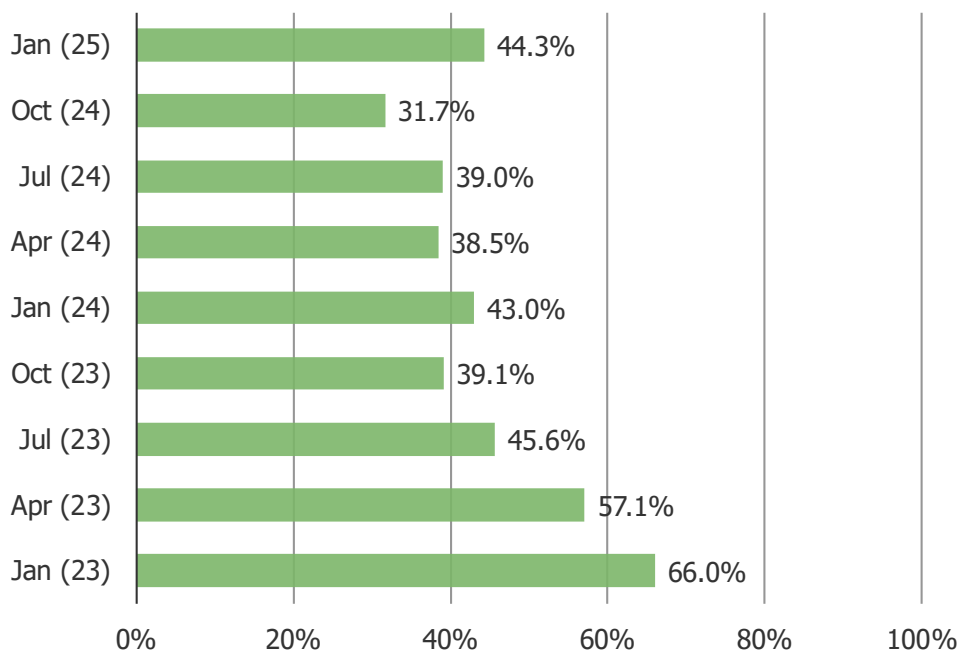
Posed to respondents who shop Temu regularly or occasionally...



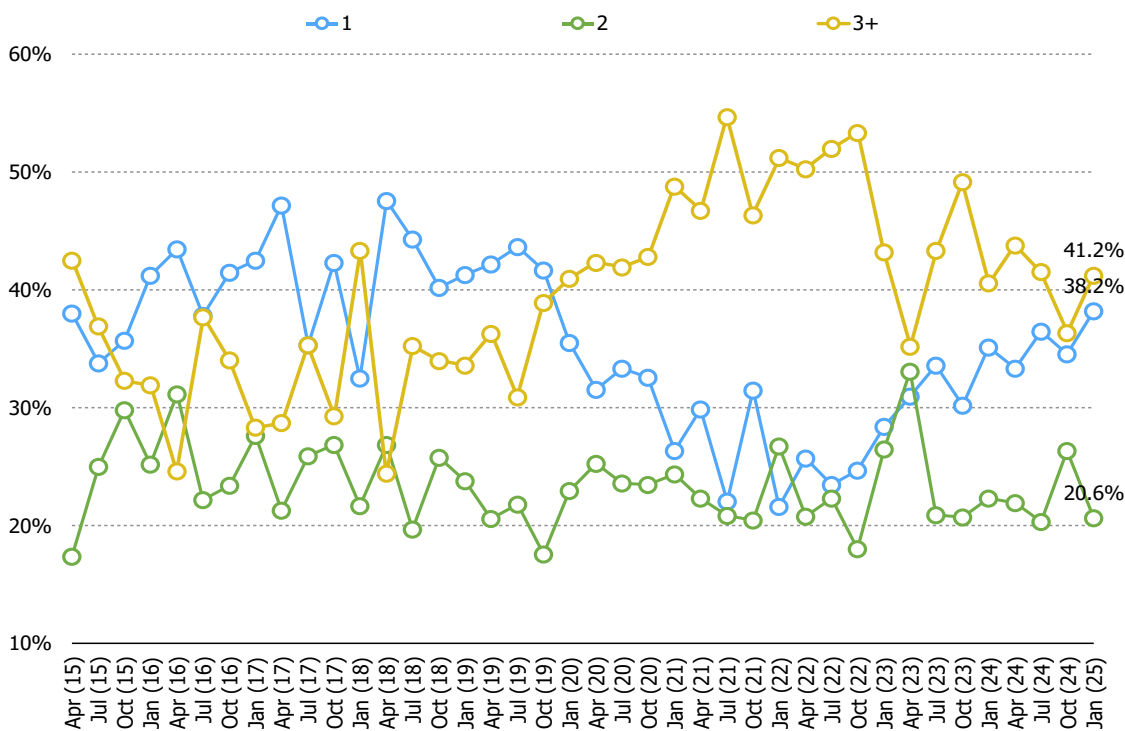
ETSY USERS – HAVE YOU PURCHASED AN ITEM FROM ETSY IN THE LAST THREE MONTHS?



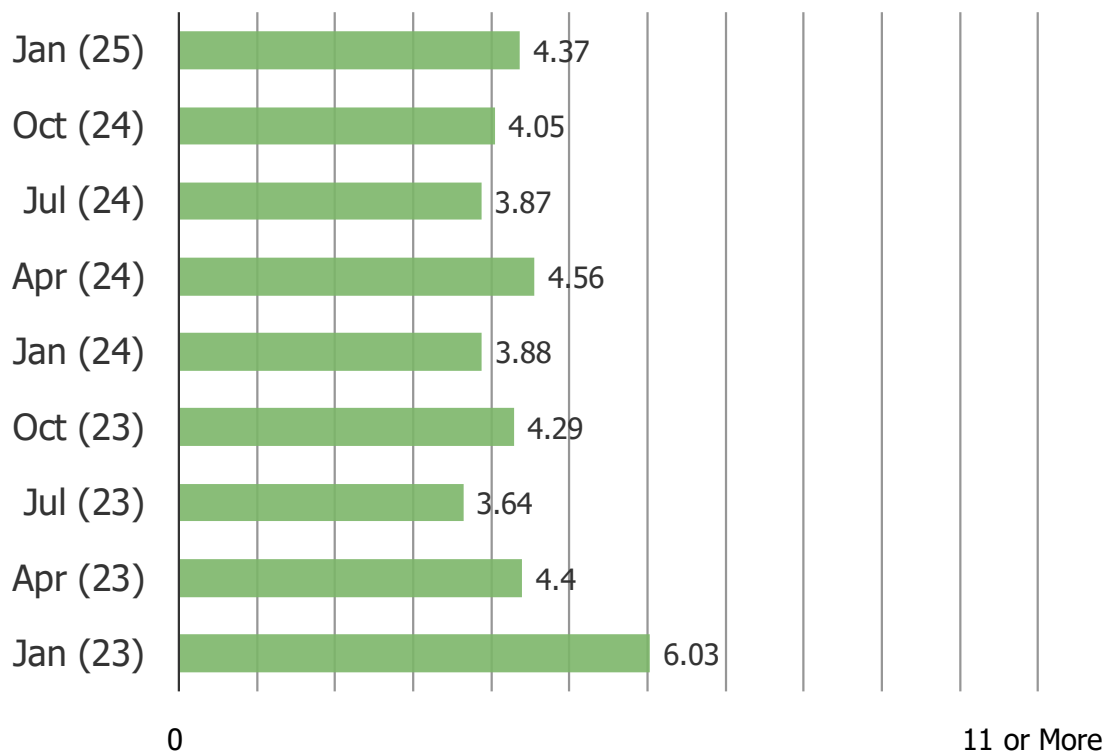
Posed to respondents who shop Temu regularly or occasionally and shop Etsy...



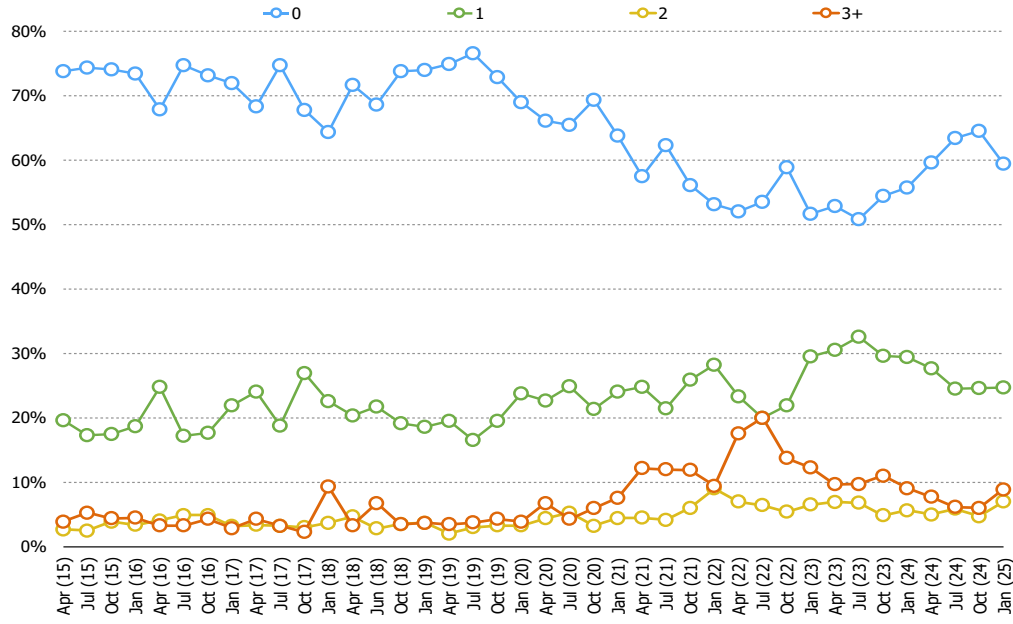
PURCHASED THROUGH ETSY IN PAST THREE MONTHS – HOW MANY ITEMS HAVE YOU PURCHASED THROUGH ETSY IN THE LAST THREE MONTHS?



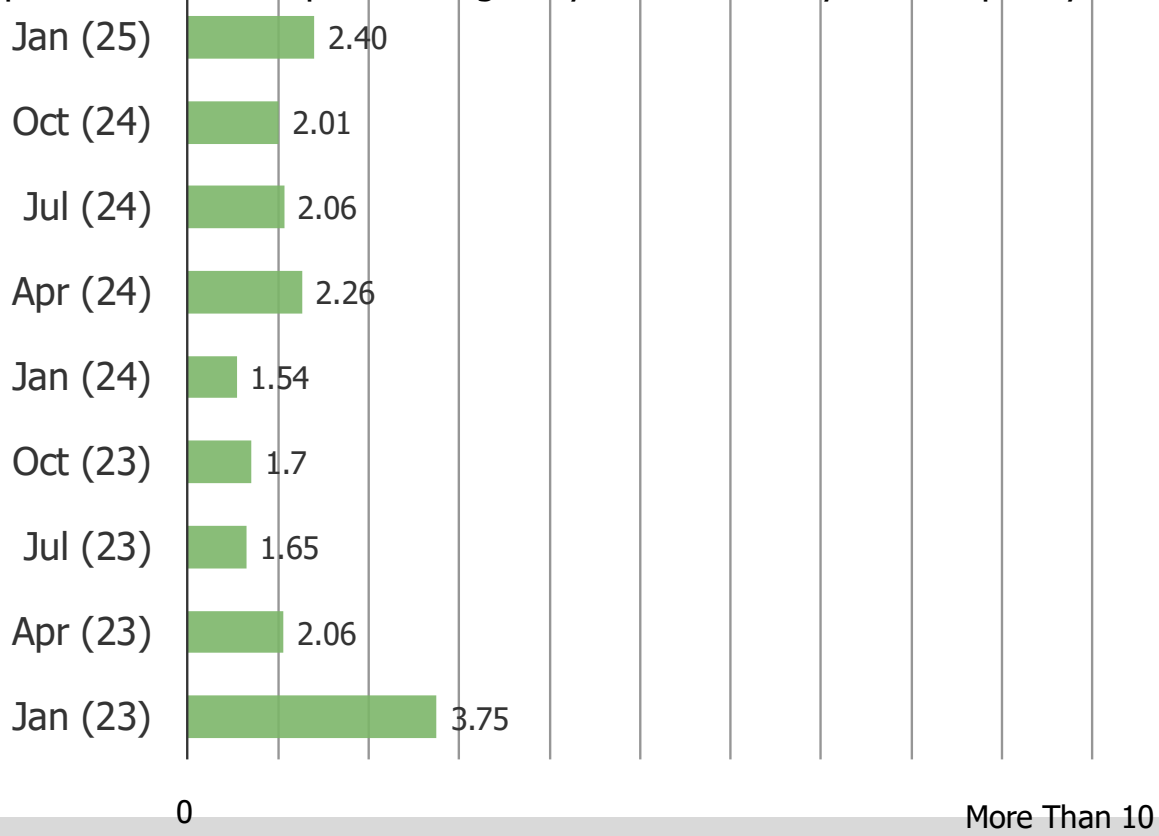
Posed to respondents who shop Temu regularly or occasionally and shop Etsy...



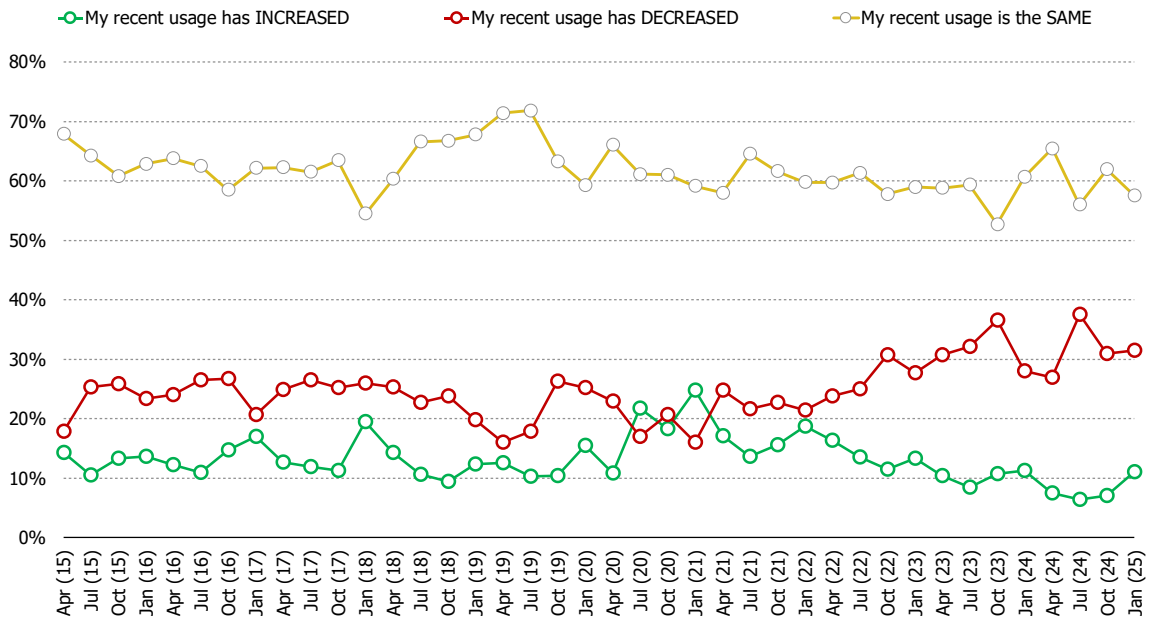
ETSY USERS – ON AVERAGE, HOW MANY ITEMS DO YOU BUY THROUGH ETSY PER MONTH



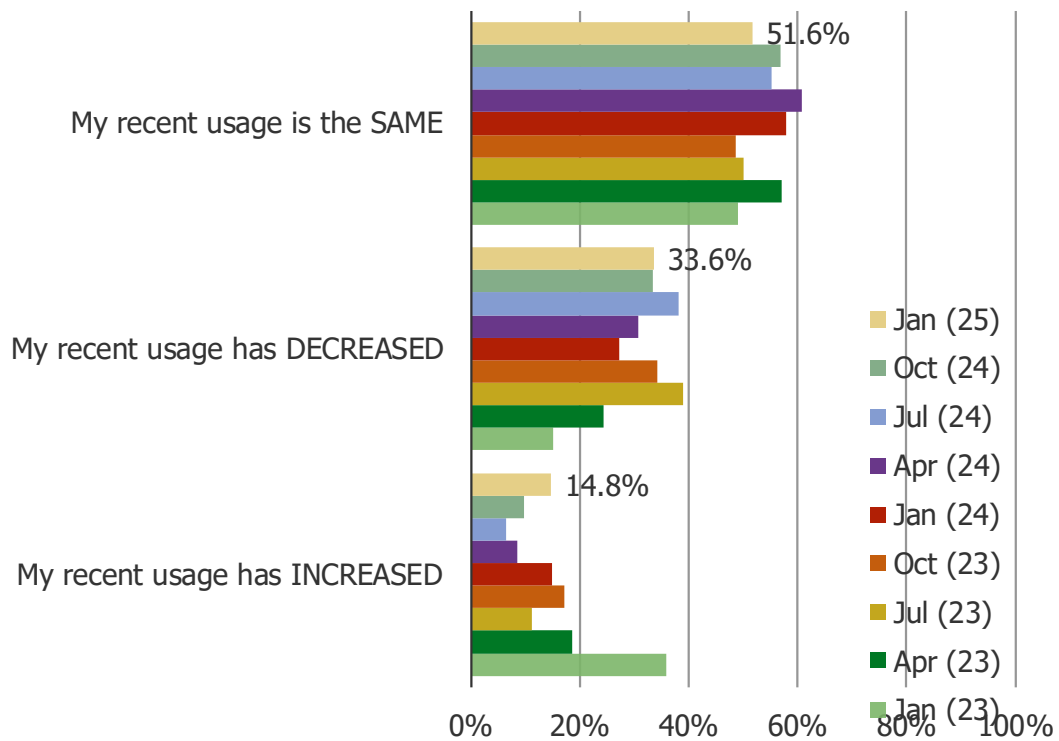
Posed to respondents who shop Temu regularly or occasionally and shop Etsy...



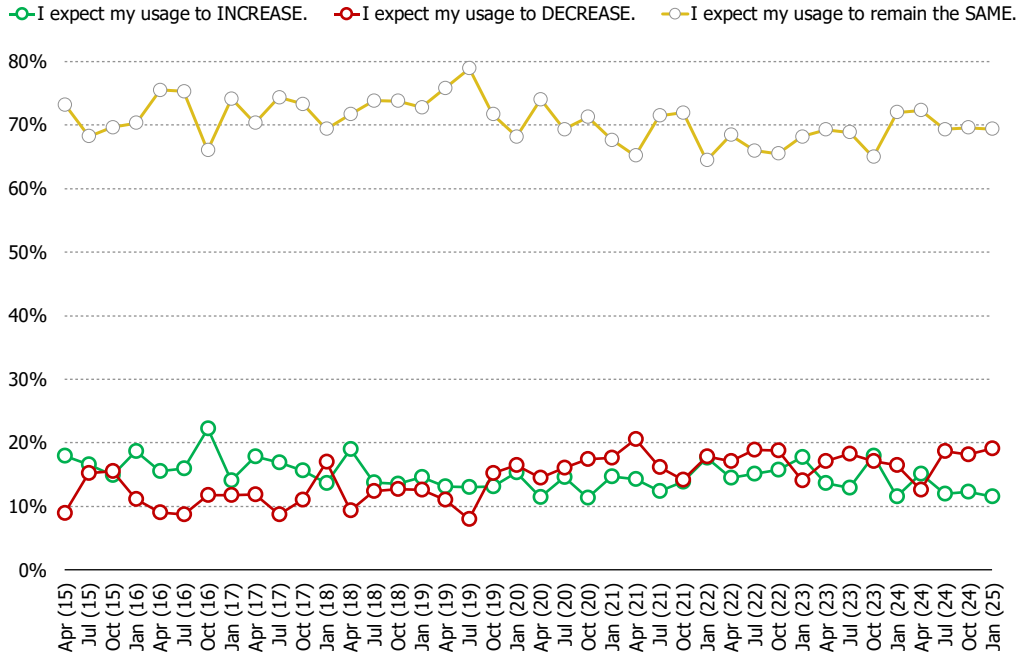
ETSY USERS – RECENT USAGE



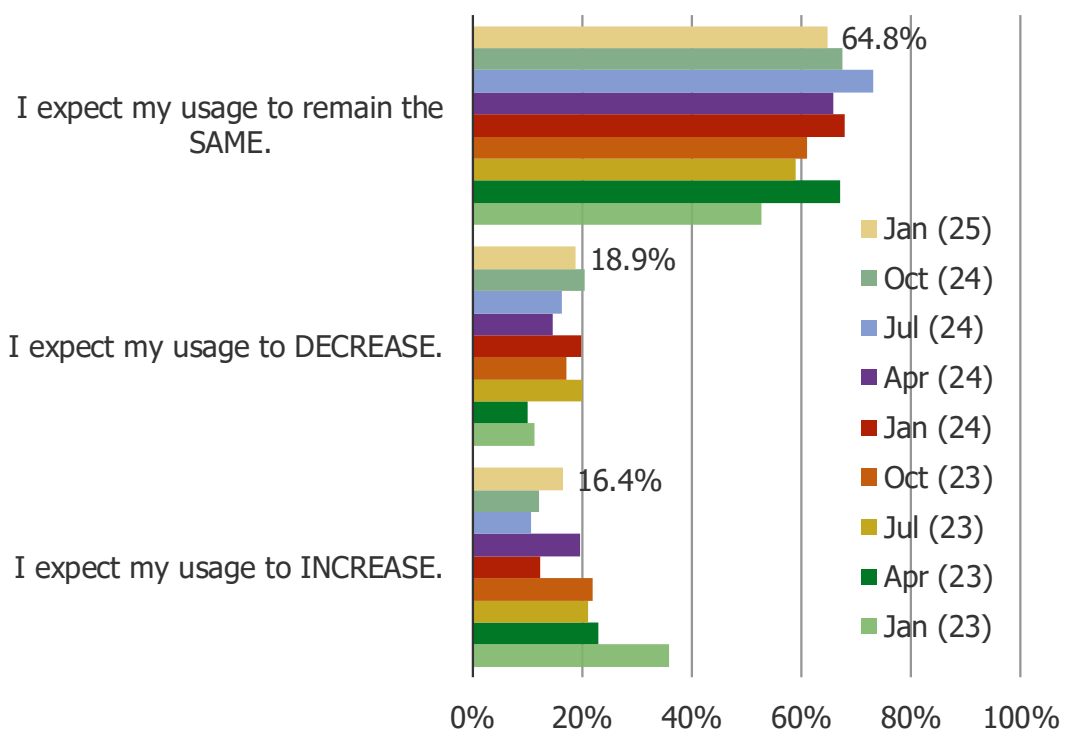
Posed to respondents who shop Temu regularly or occasionally and shop Etsy...



ETSY USERS – EXPECTED USAGE



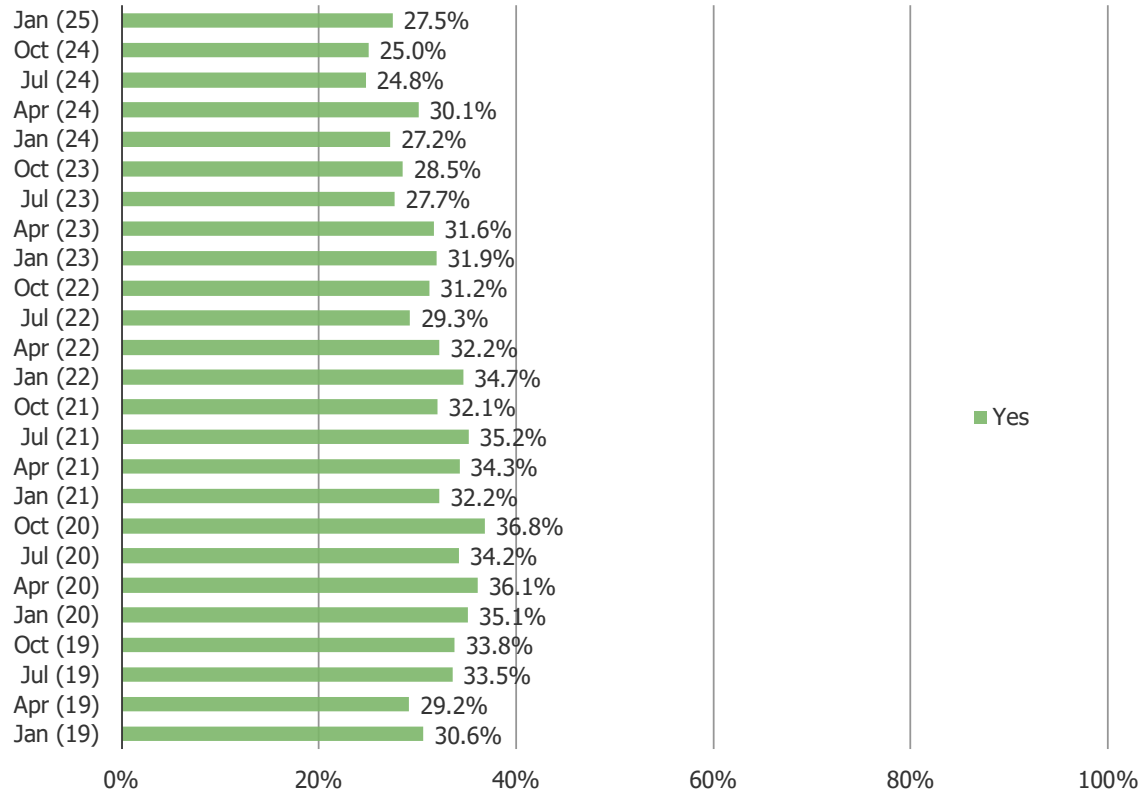
Posed to respondents who shop Temu regularly or occasionally and shop Etsy...



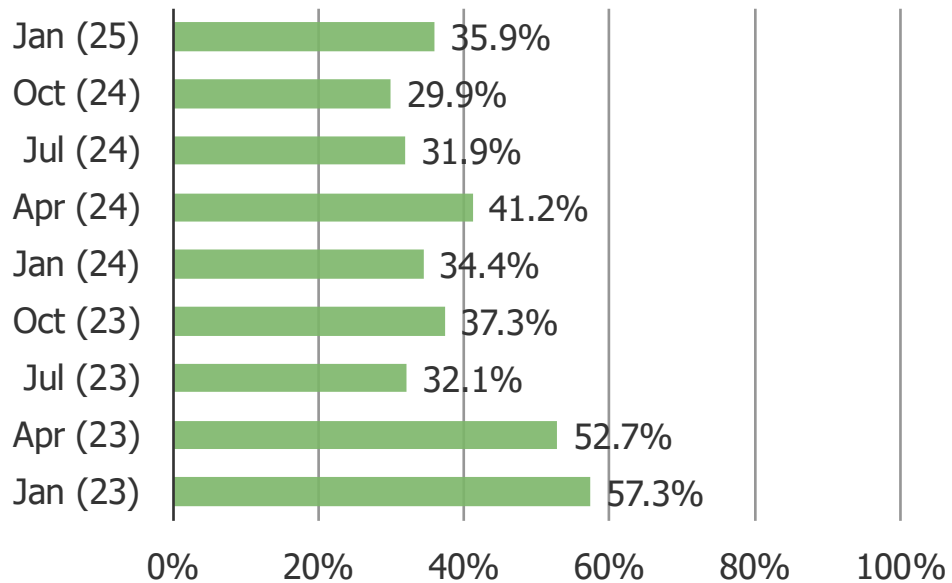
Temu

APPENDIX – WAYFAIR <> TEMU

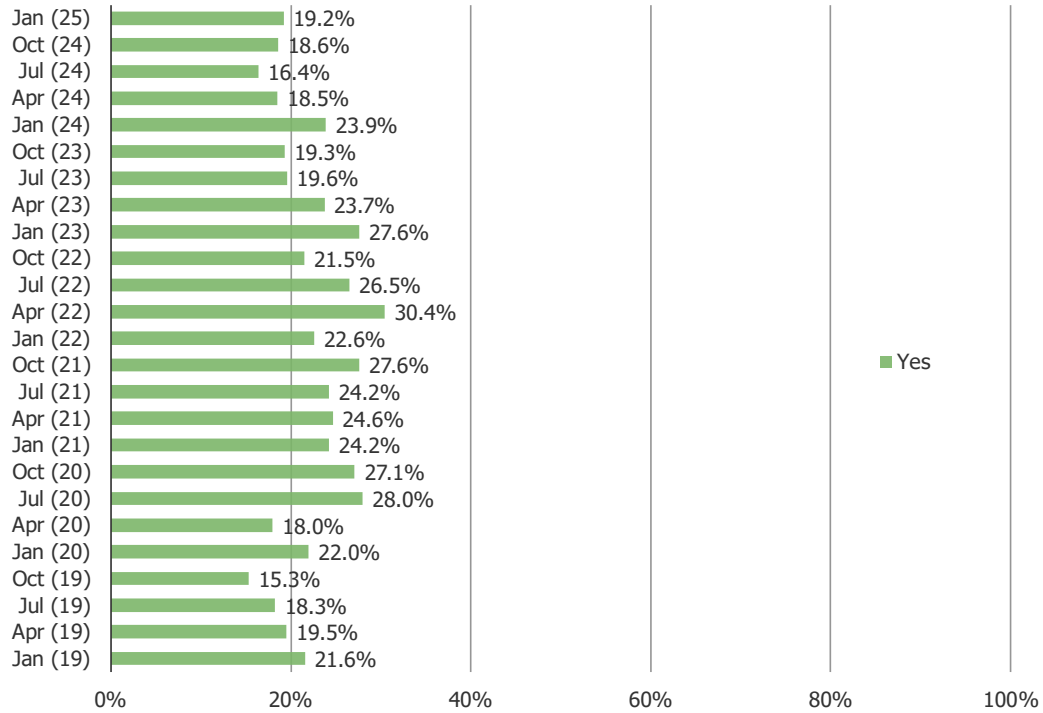
ALL RESPONDENTS - DO YOU EVER USE OR VISIT WAYFAIR?



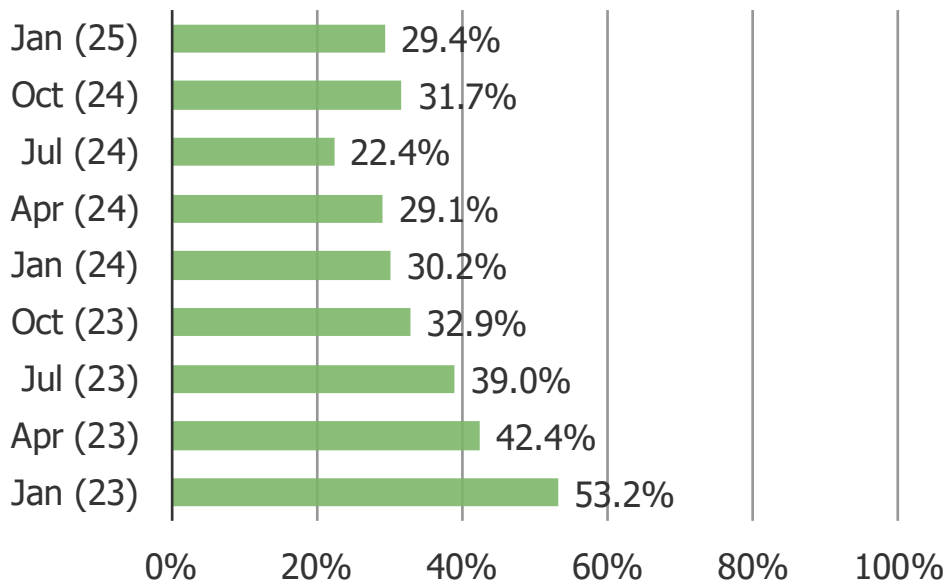
Posed to respondents who shop Temu regularly or occasionally...



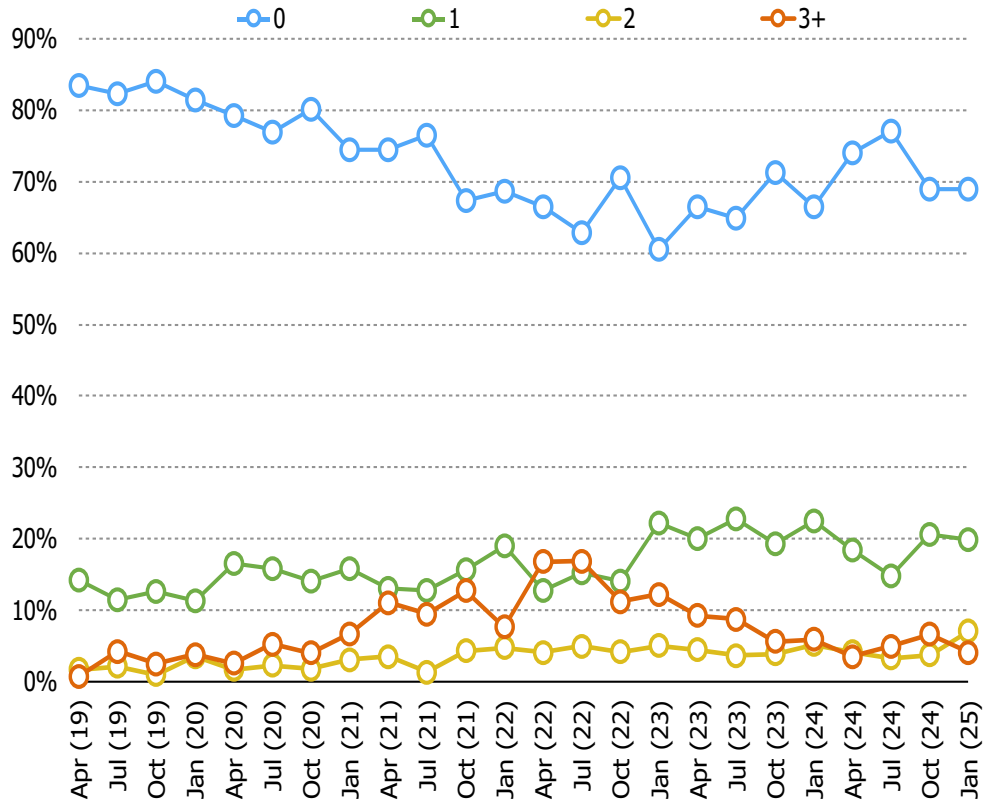
WAYFAIR USERS – HAVE YOU PURCHASED AN ITEM FROM WAYFAIR IN THE PAST THREE MONTHS?



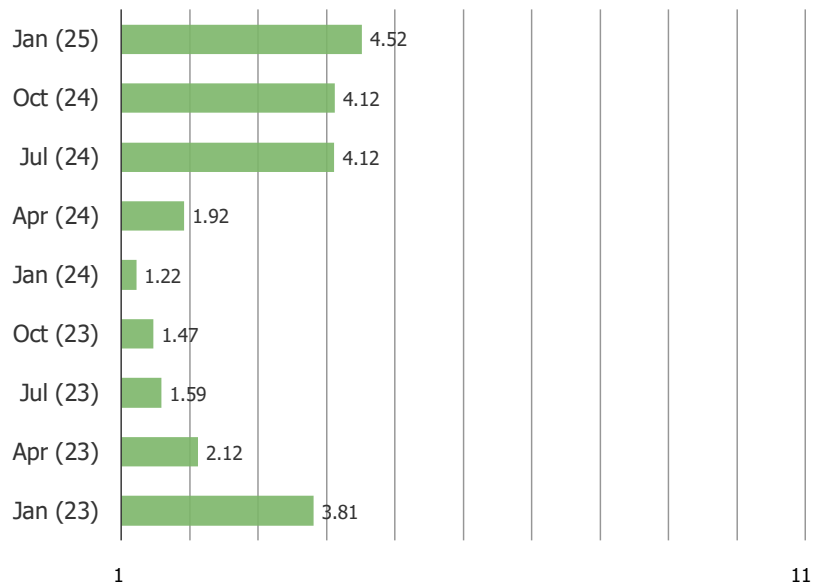
Posed to respondents who shop Temu regularly or occasionally and shop Wayfair...



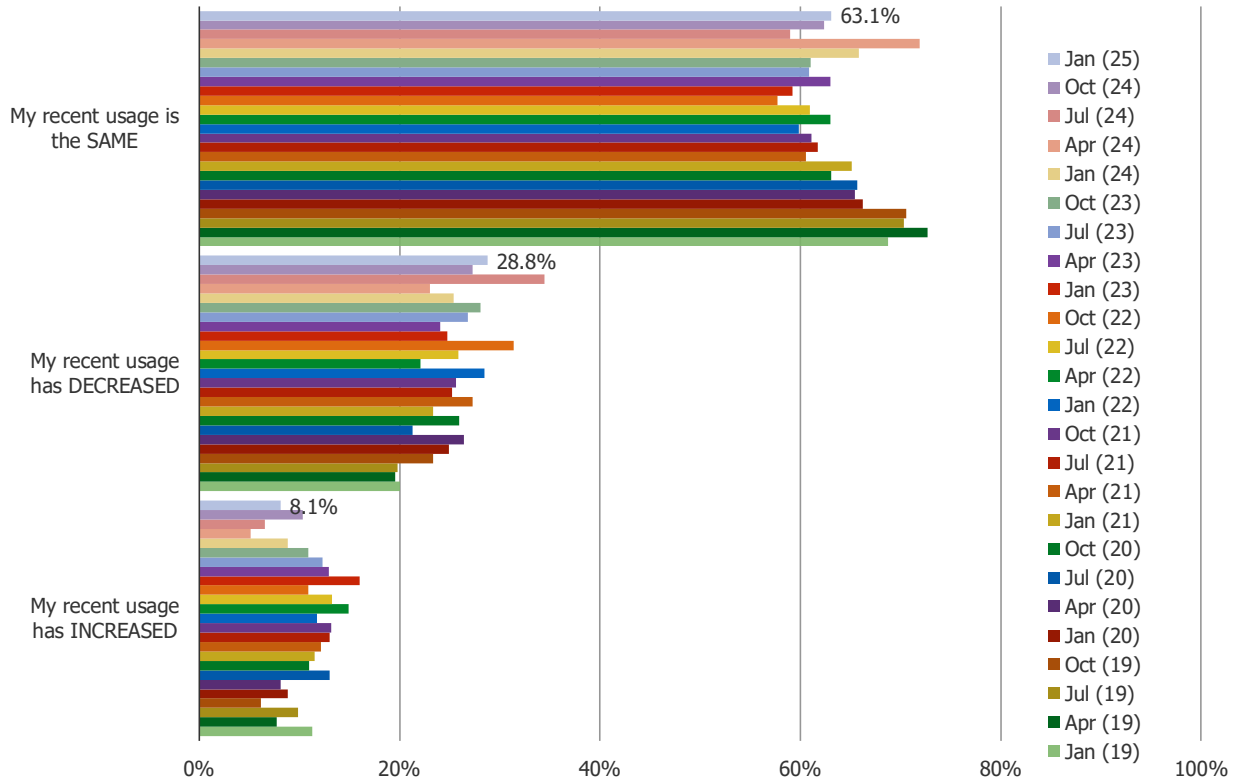
ON AVERAGE, HOW MANY ITEMS DO YOU PURCHASE FROM WAYFAIR PER MONTH?



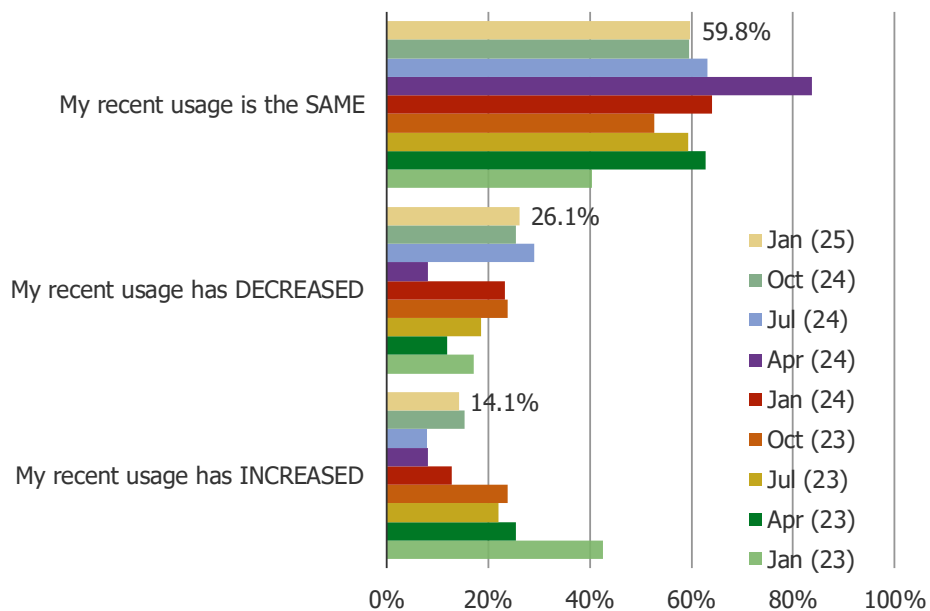
Posed to respondents who shop Temu regularly or occasionally and shop Wayfair...



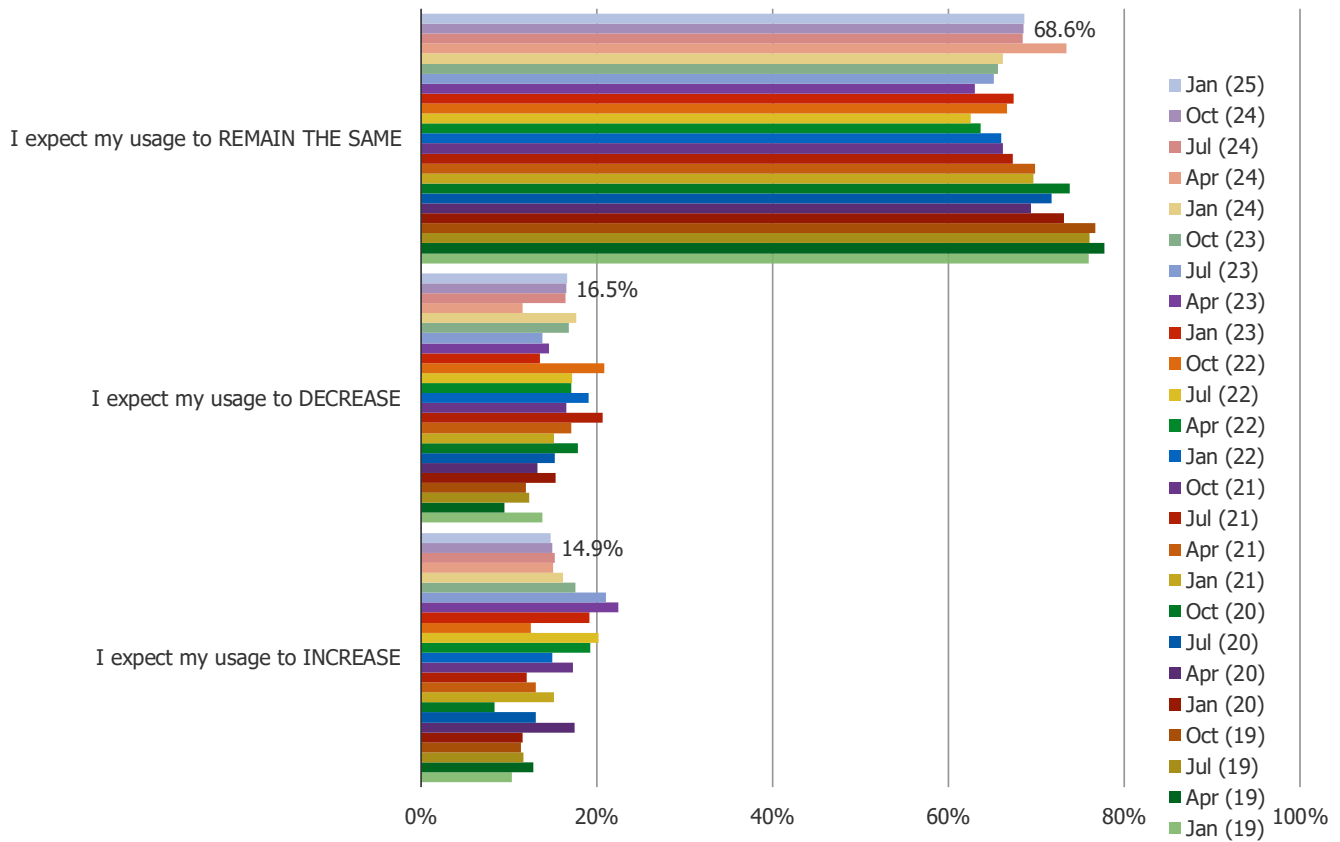
WAYFAIR USERS – RECENT USAGE



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...

