

**Audience:** 1,250+ US Consumers Balanced To Census, 1,000+ UK Consumers

## KEY TAKEAWAYS:

### POSITIVES

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- ❑ Brand satisfaction is very strong.
- ❑ Gym memberships among all respondents are down sequentially.
- ❑ Gym members are feeling the pull toward home workouts – an increasing percentage each quarter say working out at home would be better for them.
- ❑ Awareness of the Peloton brand is up considerably.
- ❑ 20%+ of those who are aware of Peloton but do not own Peloton products see themselves “probably” or “definitely” getting it in the future. Not everyone from this group will follow through, but it shows runway for adding customers even at relatively expensive price points.
- ❑ In the UK, there is relatively strong interest in the tread among bike owners.

### NEGATIVES

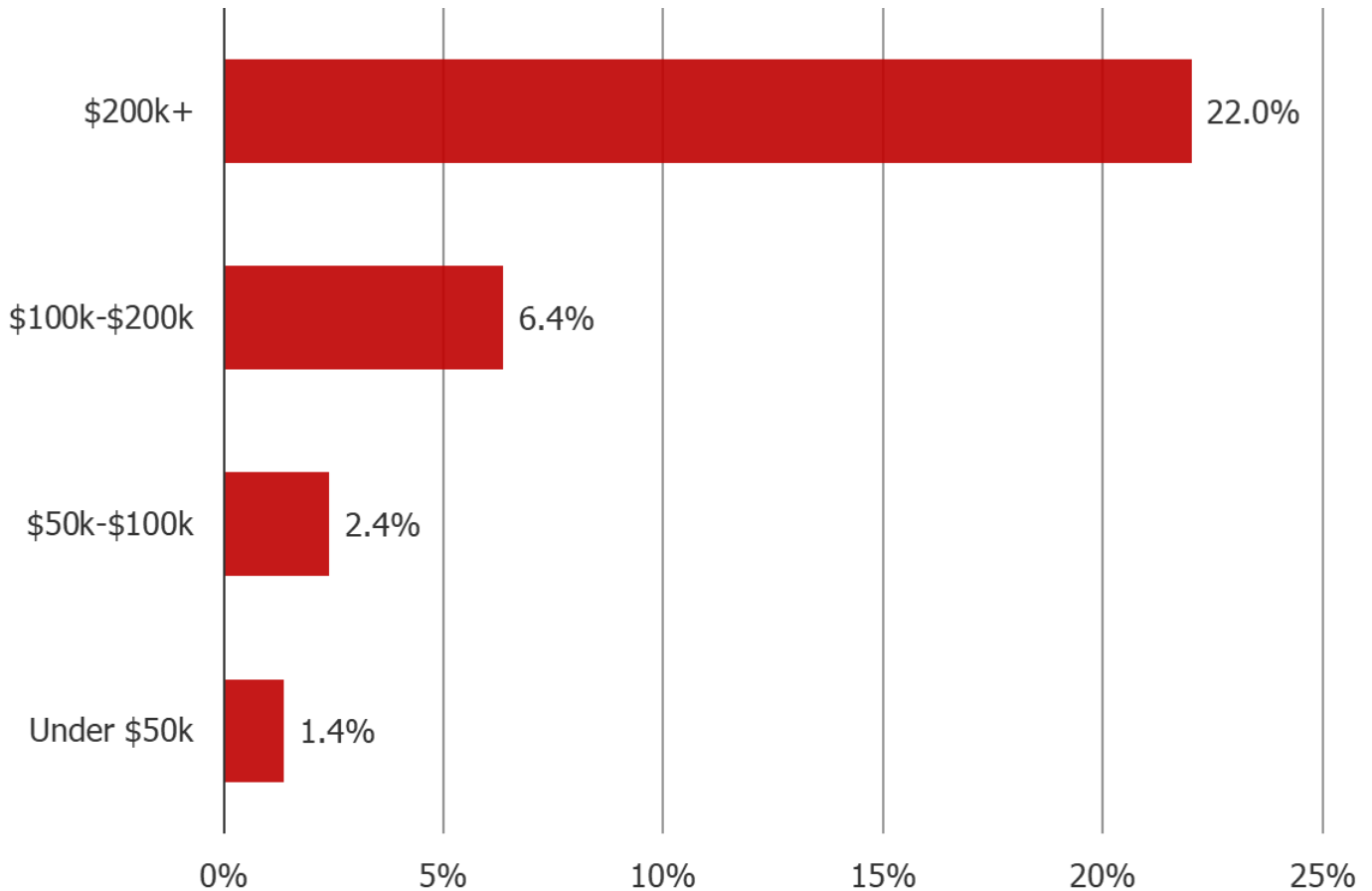
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- ❑ A recession could impact demand. Cohorts that over-index as Peloton owners include higher income, those who say their financial condition improved in the past year, people who moved recently, people who have children, etc. If a potential recession slows any of the above people/life events down, it could impact demand.
- ❑ Satisfaction with “value” among Peloton customers isn’t bad, but it isn’t great either.
- ❑ Among those who say they are unlikely to get it in the future, an overwhelming percentage say it is because of price/too expensive. For these folks, the price is a nonstarter.

## PELOTON TAM

INCOME | % OF RESPONDENT COHORTS WHO OWN PELOTON BIKE, TREAD, OR DIGITAL.

Posed to all respondents, cross tabs below.

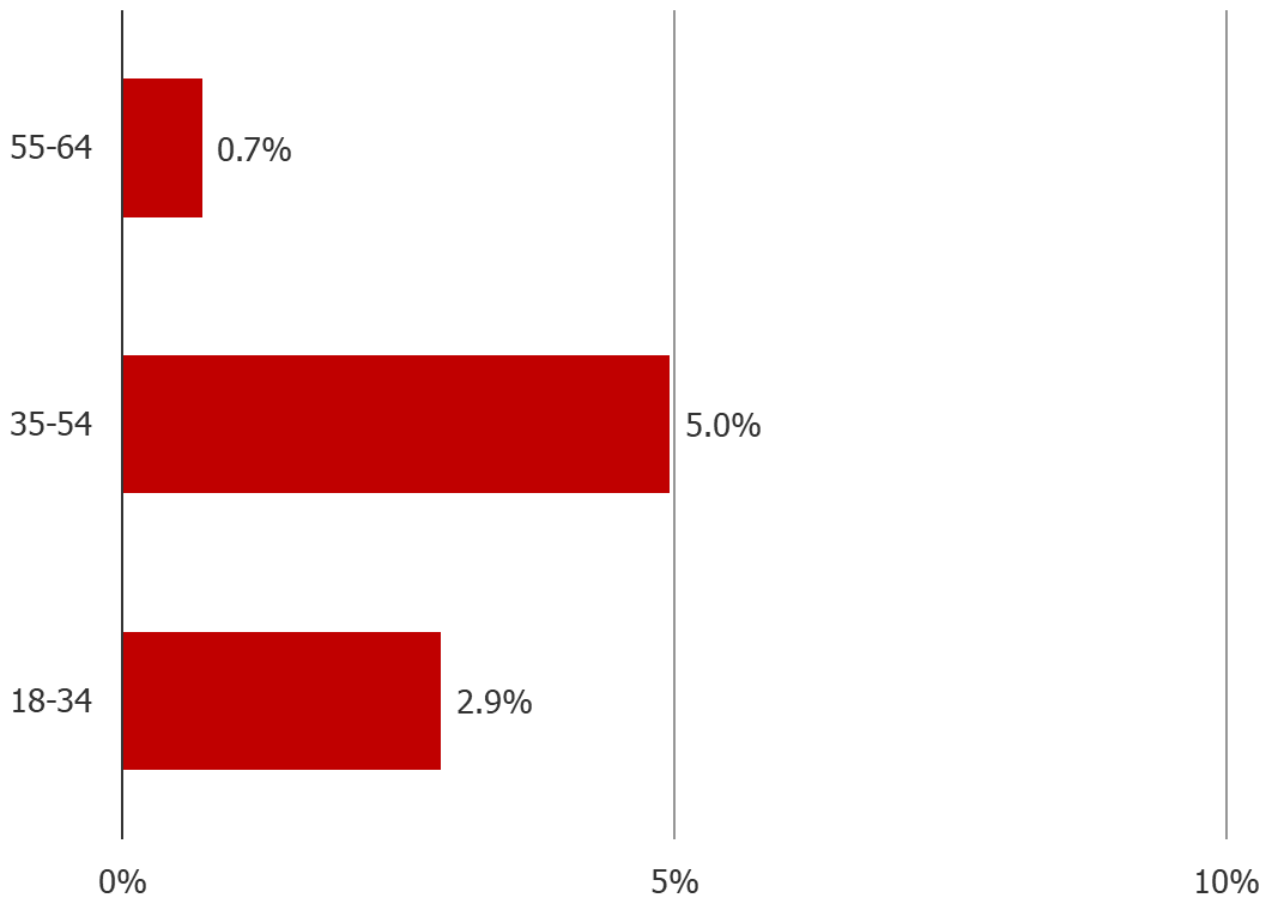


2.9% of all respondents say they own Peloton Bike, Tread, or Digital.

%'s greater than 2.9% over-index as Peloton owners (ie, that group is more likely than the average consumer to own Peloton products).

AGE | % OF RESPONDENT COHORTS WHO OWN PELOTON BIKE, TREAD, OR DIGITAL.

Posed to all respondents, cross tabs below.

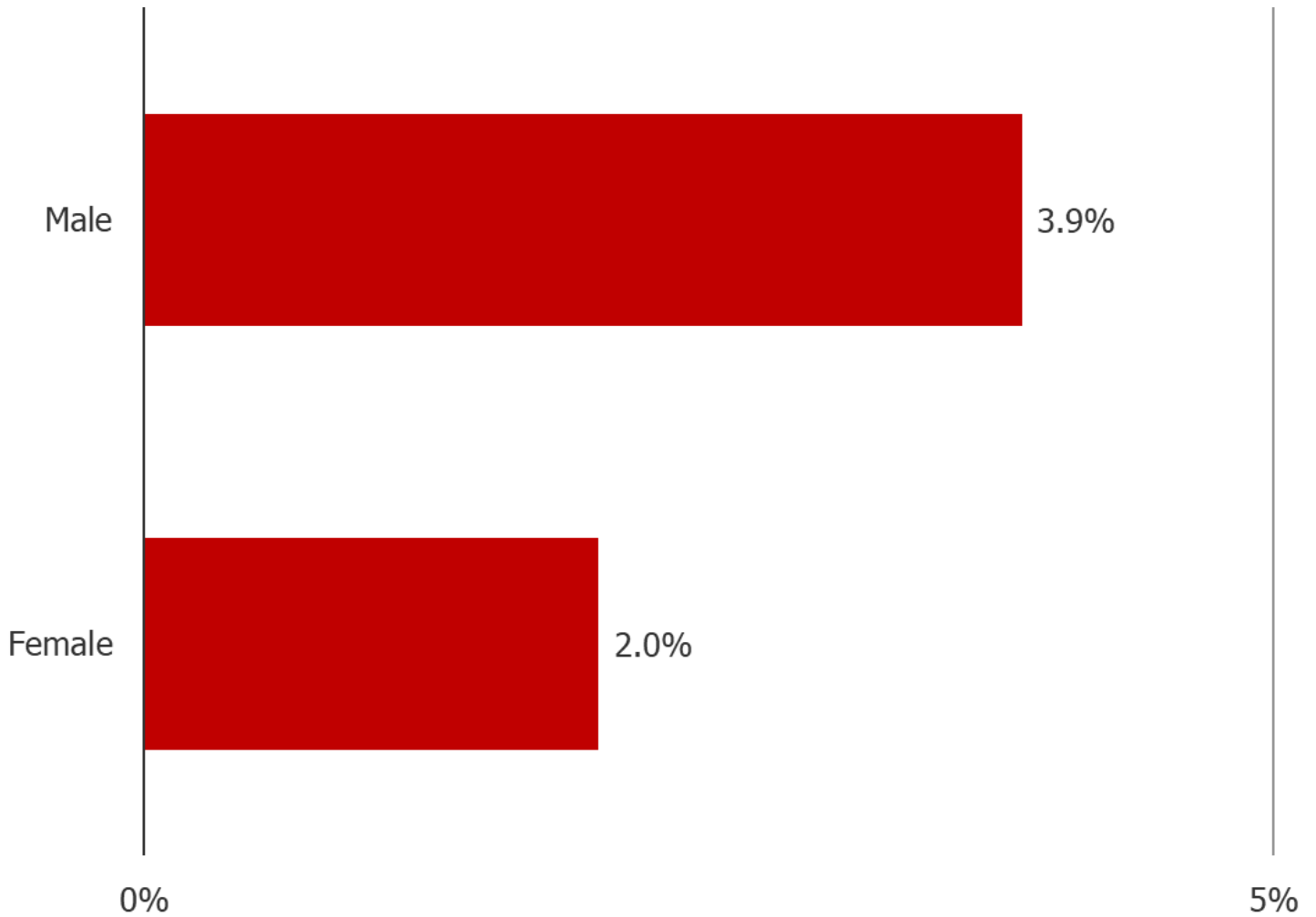


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GENDER | % OF RESPONDENT COHORTS WHO OWN PELOTON BIKE, TREAD, OR DIGITAL.

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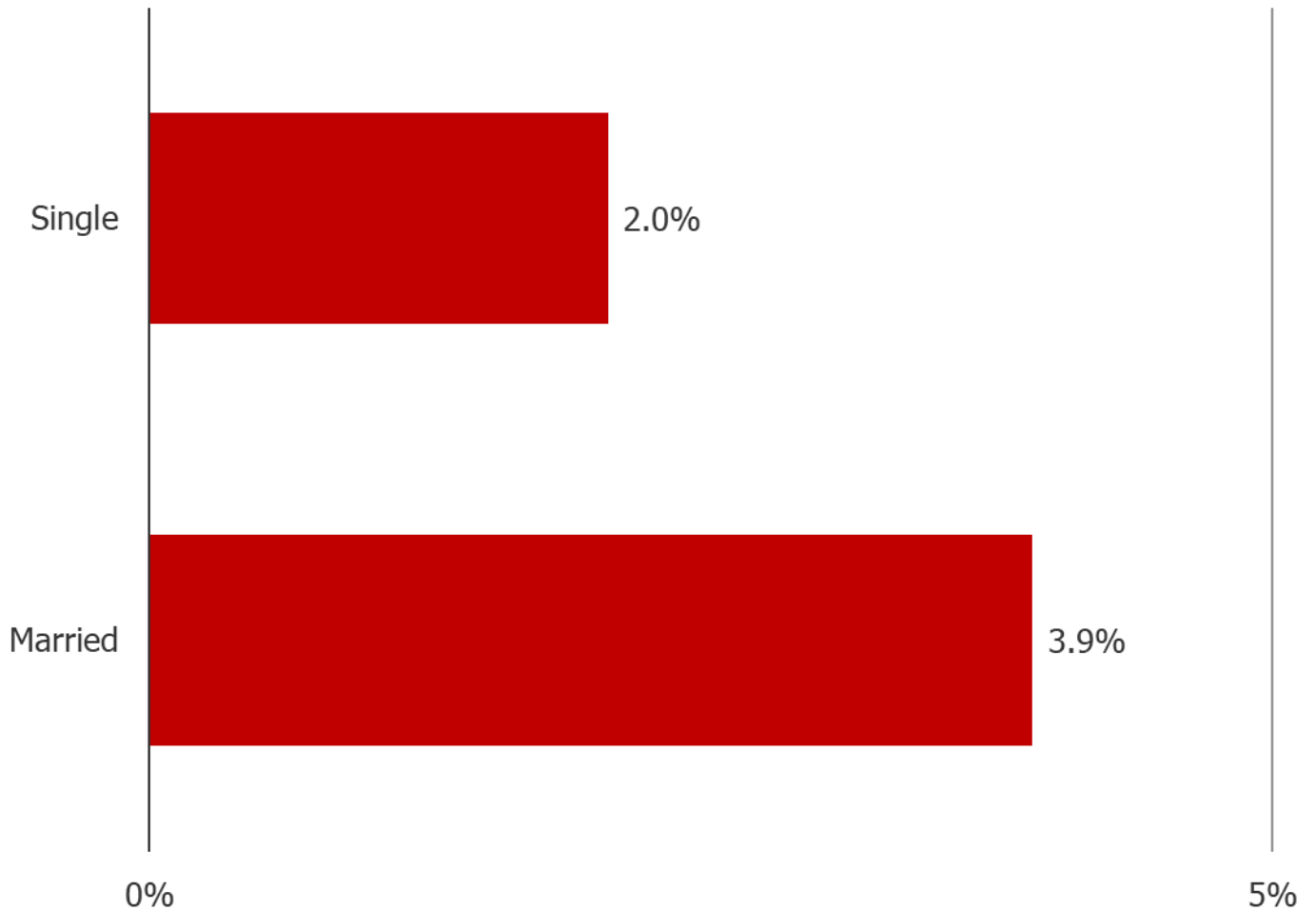


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MARITAL STATUS | % OF RESPONDENT COHORTS WHO OWN PELOTON BIKE, TREAD, OR DIGITAL.

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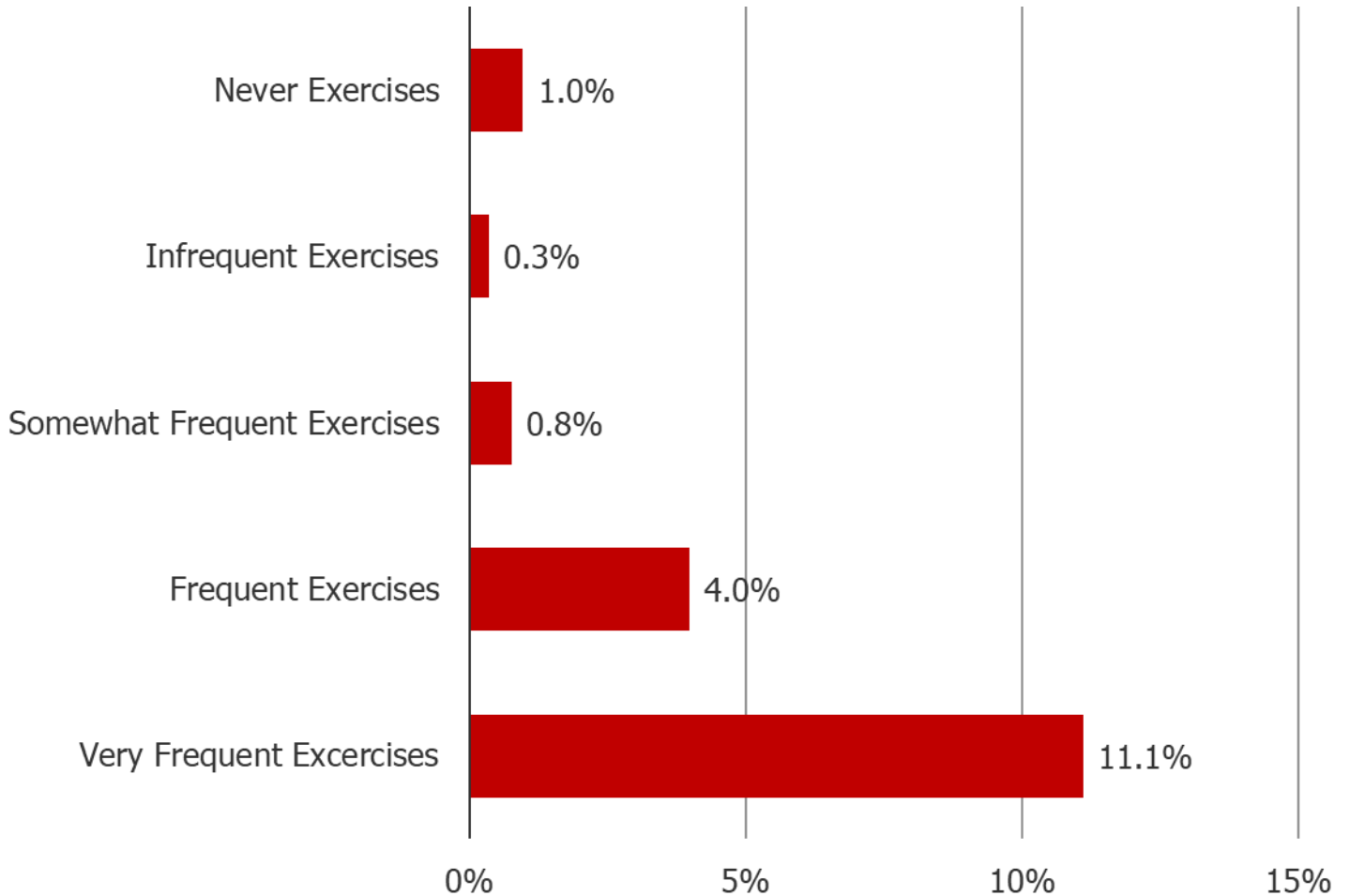


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EXERCISE FREQUENCY | % OF RESPONDENT COHORTS WHO OWN PELOTON BIKE, TREAD, OR DIGITAL.

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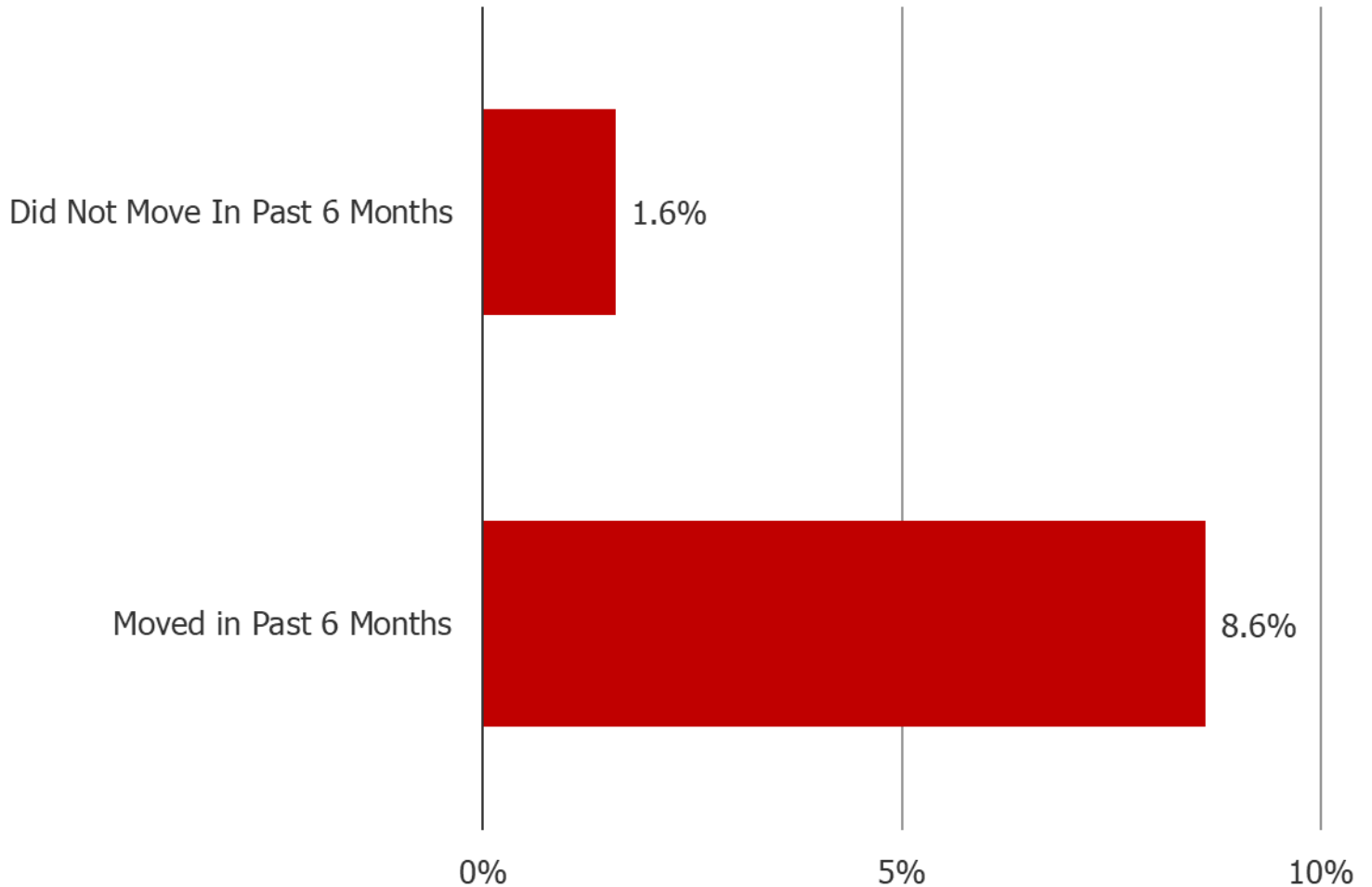


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IF THEY MOVED RECENTLY | % OF RESPONDENT COHORTS WHO OWN PELOTON BIKE, TREAD, OR DIGITAL.

Posed to all respondents, cross tabs below.



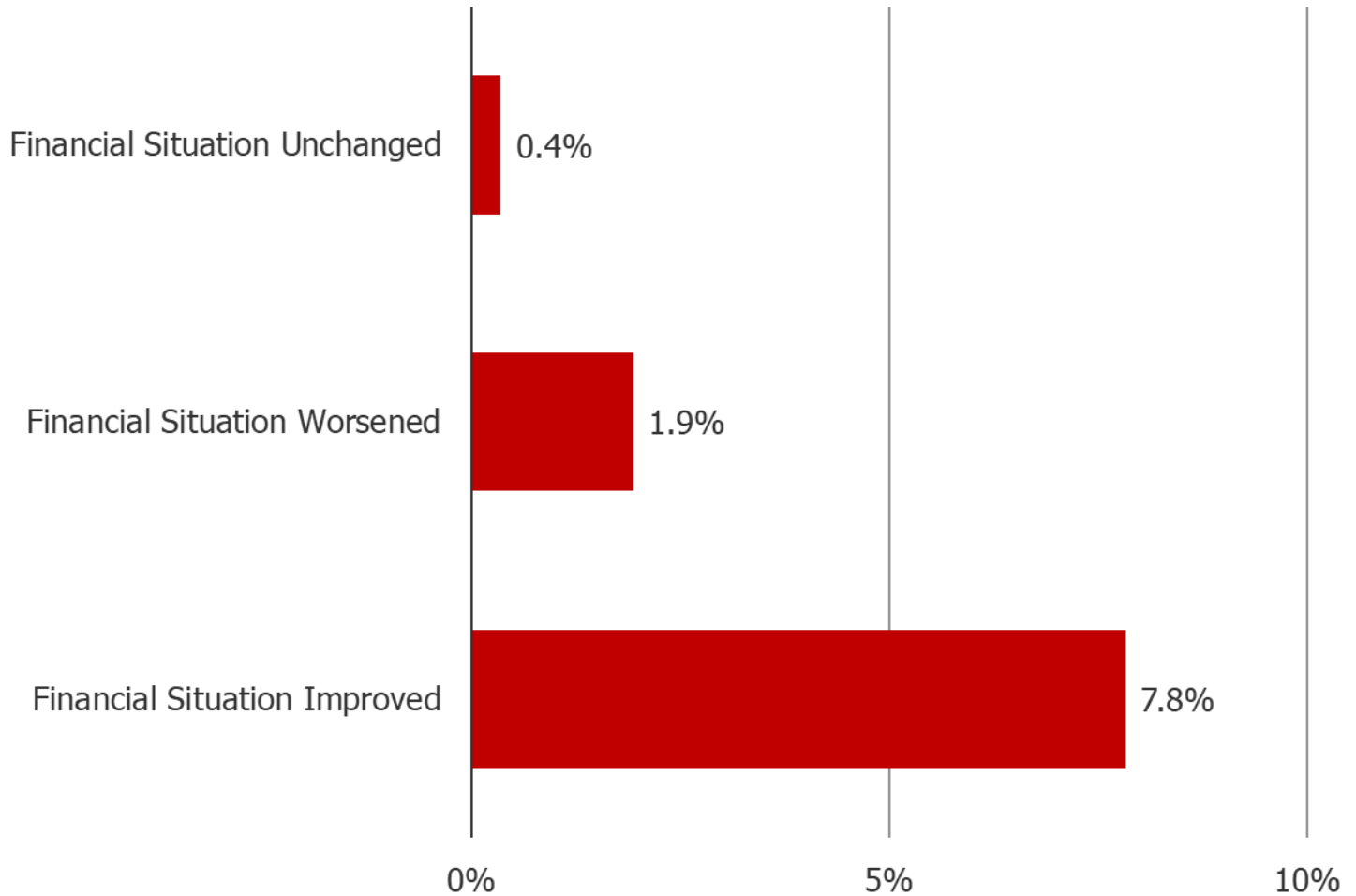
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CHANGES IN FINANCIAL SITUATION | % OF RESPONDENT COHORTS WHO OWN PELOTON BIKE, TREAD, OR DIGITAL.

Posed to all respondents, cross tabs below.

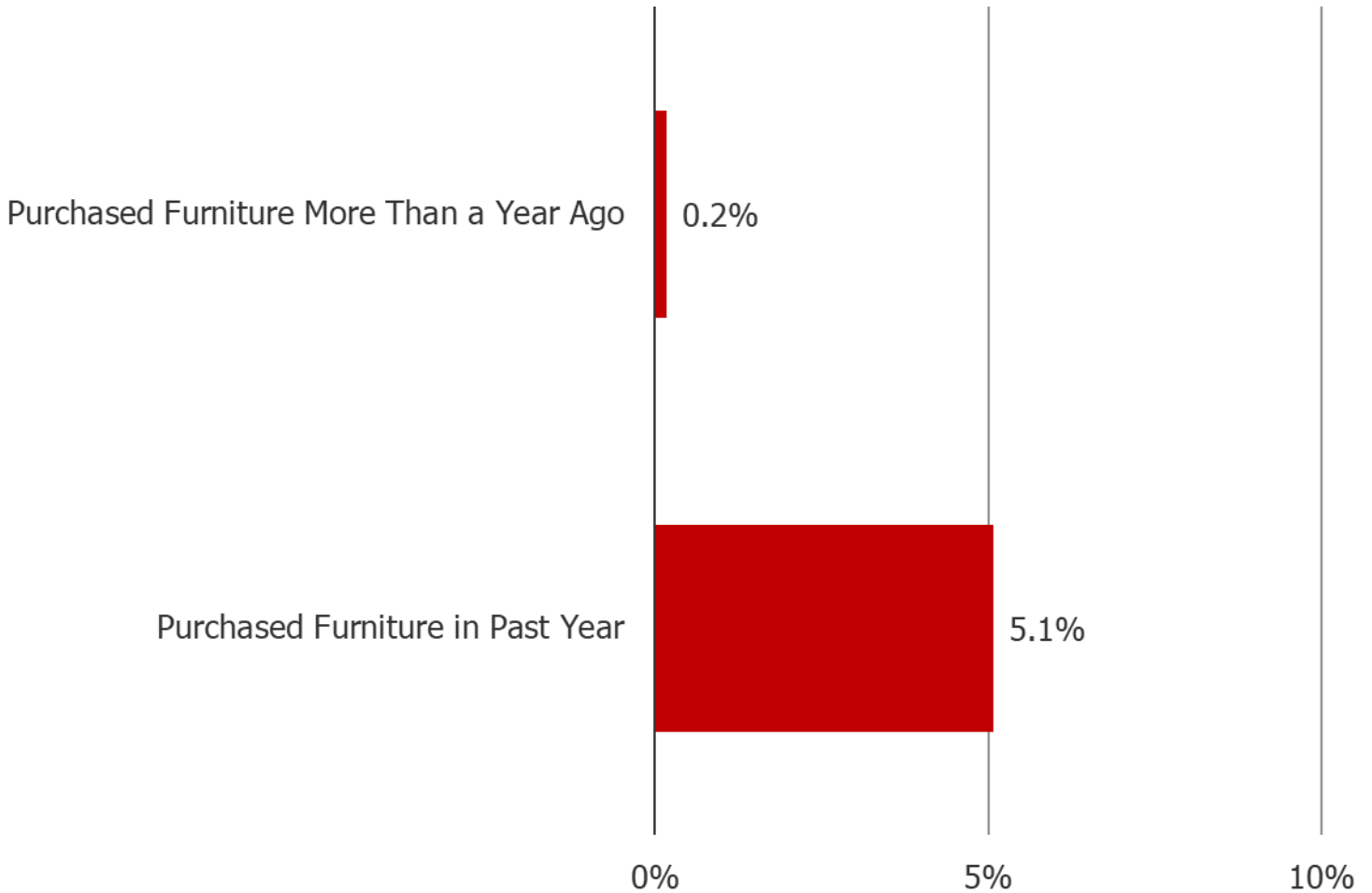


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FURNITURE PURCHASES | % OF RESPONDENT COHORTS WHO OWN PELOTON BIKE, TREAD, OR DIGITAL.

Posed to all respondents, cross tabs below.

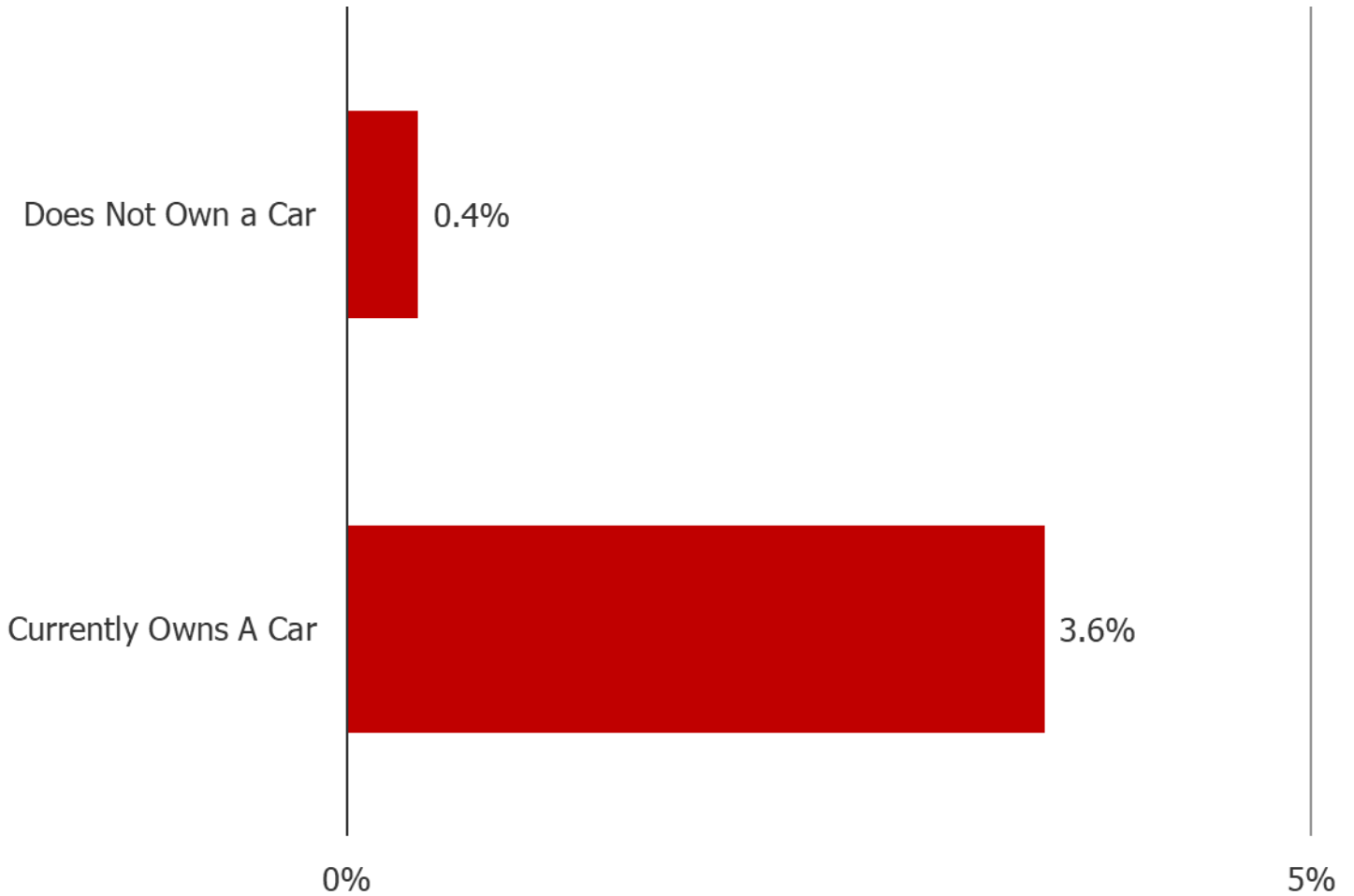


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AUTO OWNERSHIP | % OF RESPONDENT COHORTS WHO OWN PELOTON BIKE, TREAD, OR DIGITAL.

Posed to all respondents, cross tabs below.

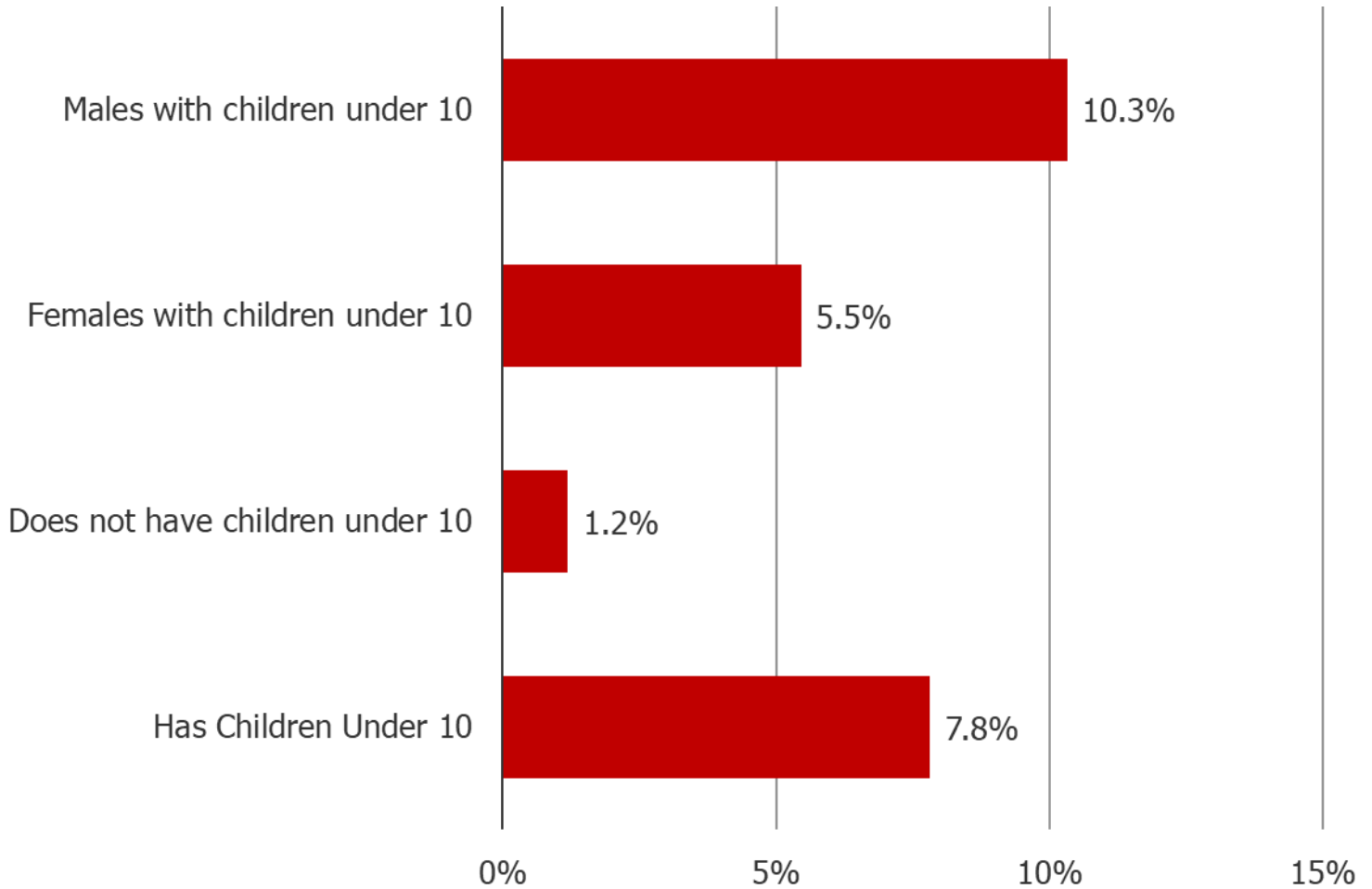


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IF THEY HAVE CHILDREN | % OF RESPONDENT COHORTS WHO OWN PELOTON BIKE, TREAD, OR DIGITAL.

Posed to all respondents, cross tabs below.

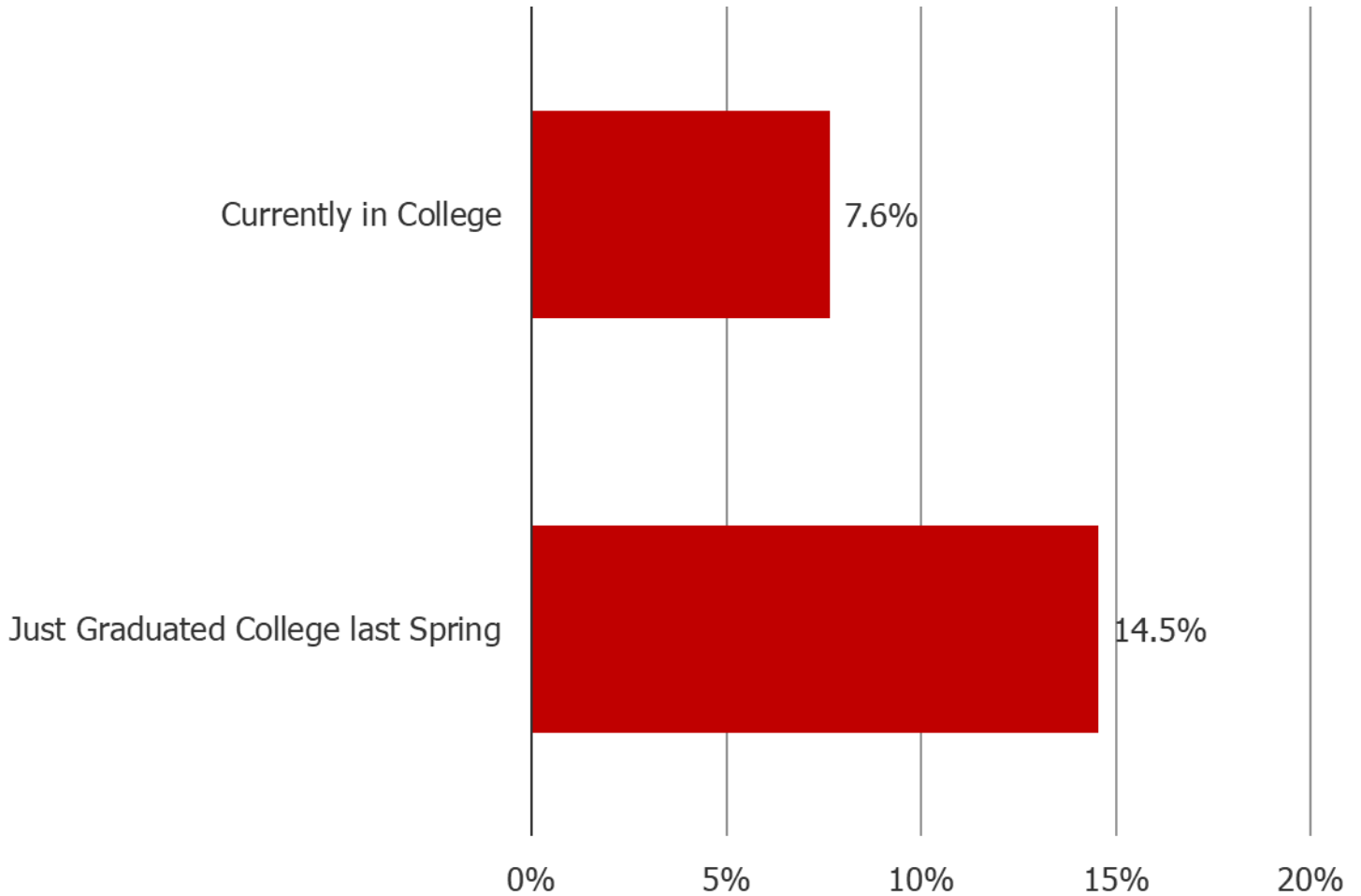


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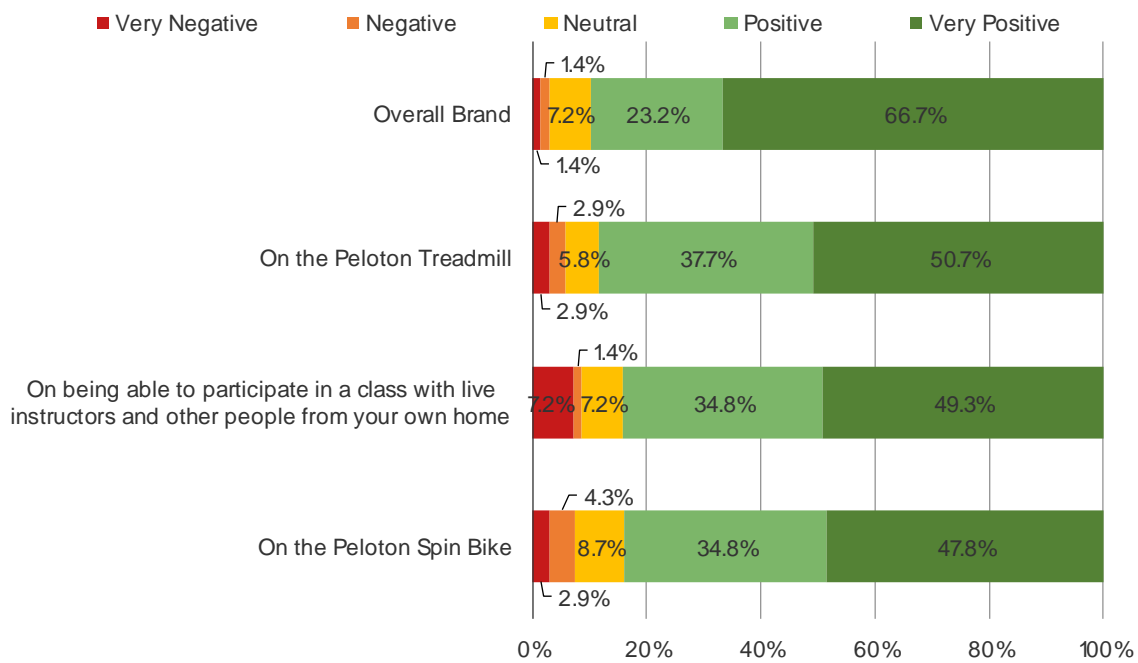
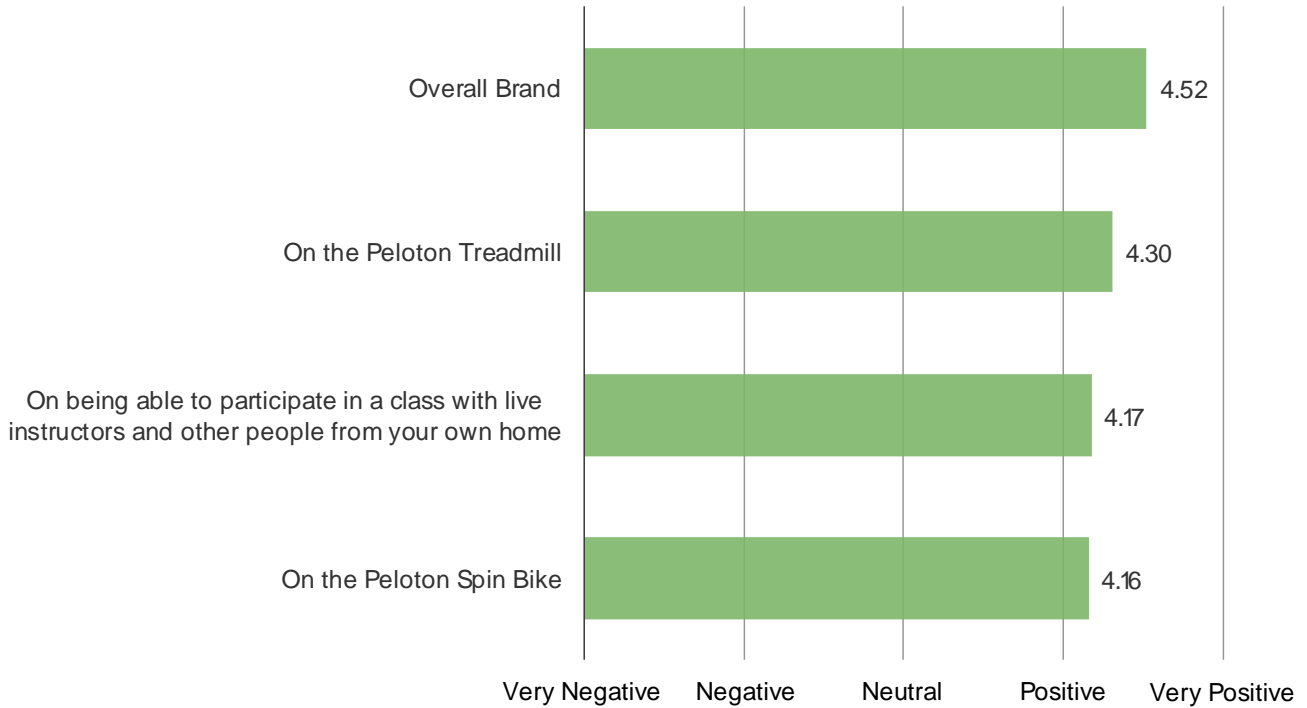
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## PELOTON OWNERS

WHAT IS YOUR OPINION OF THE PELOTON BRAND?

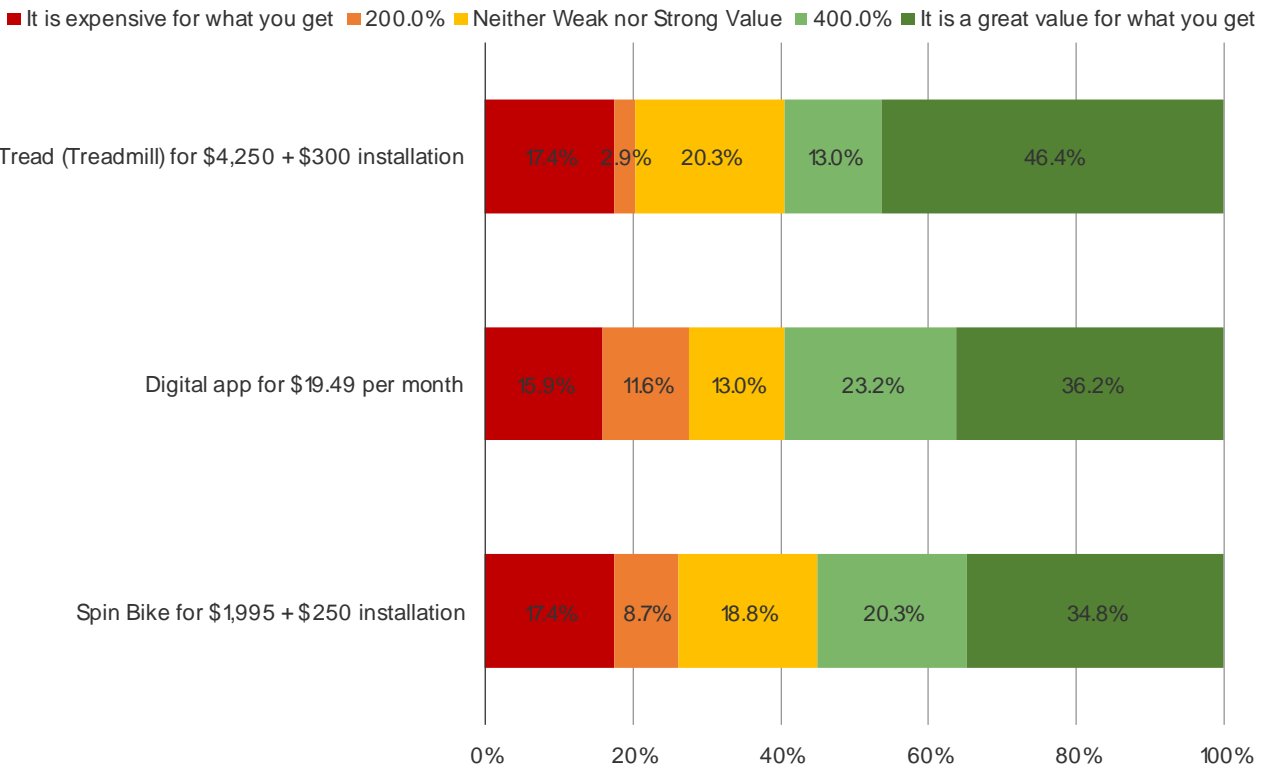
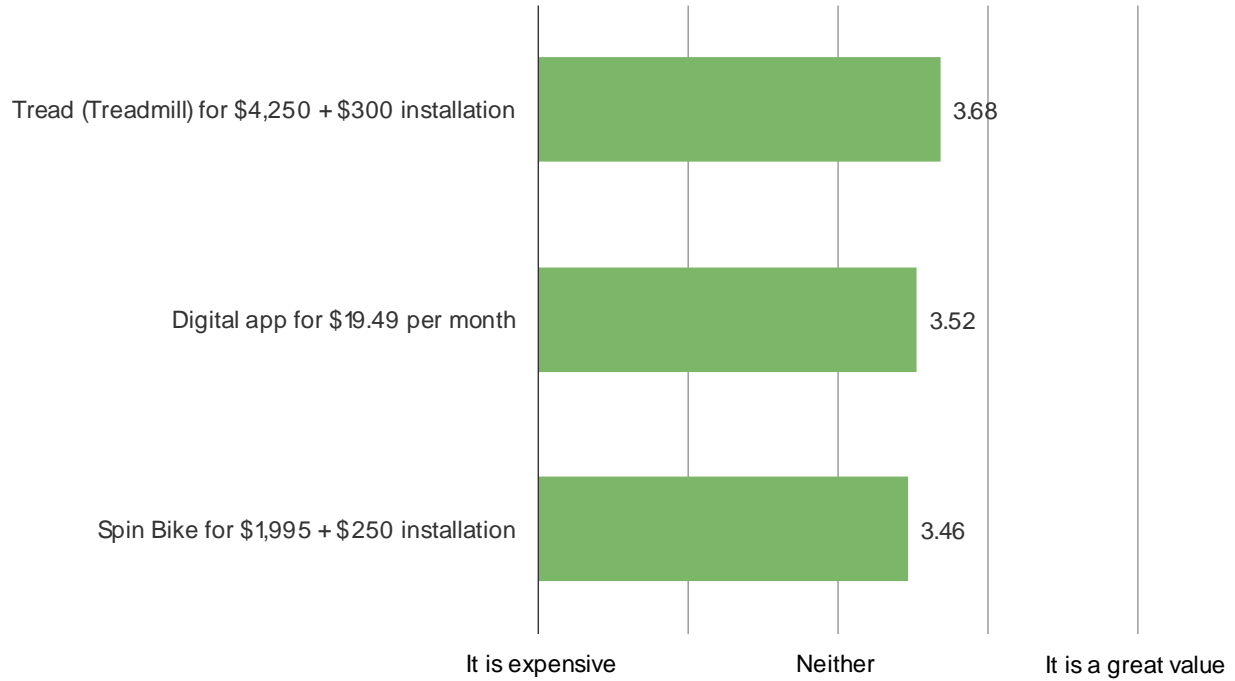
Posed to Peloton owners



N=69

BELOW ARE PELOTON PRODUCTS/SERVICES LISTED WITH PRICING NEXT TO IT. WHAT IS YOUR OPINION OF THE VALUE FOR EACH OF THE FOLLOWING?

Posed to Peloton owners

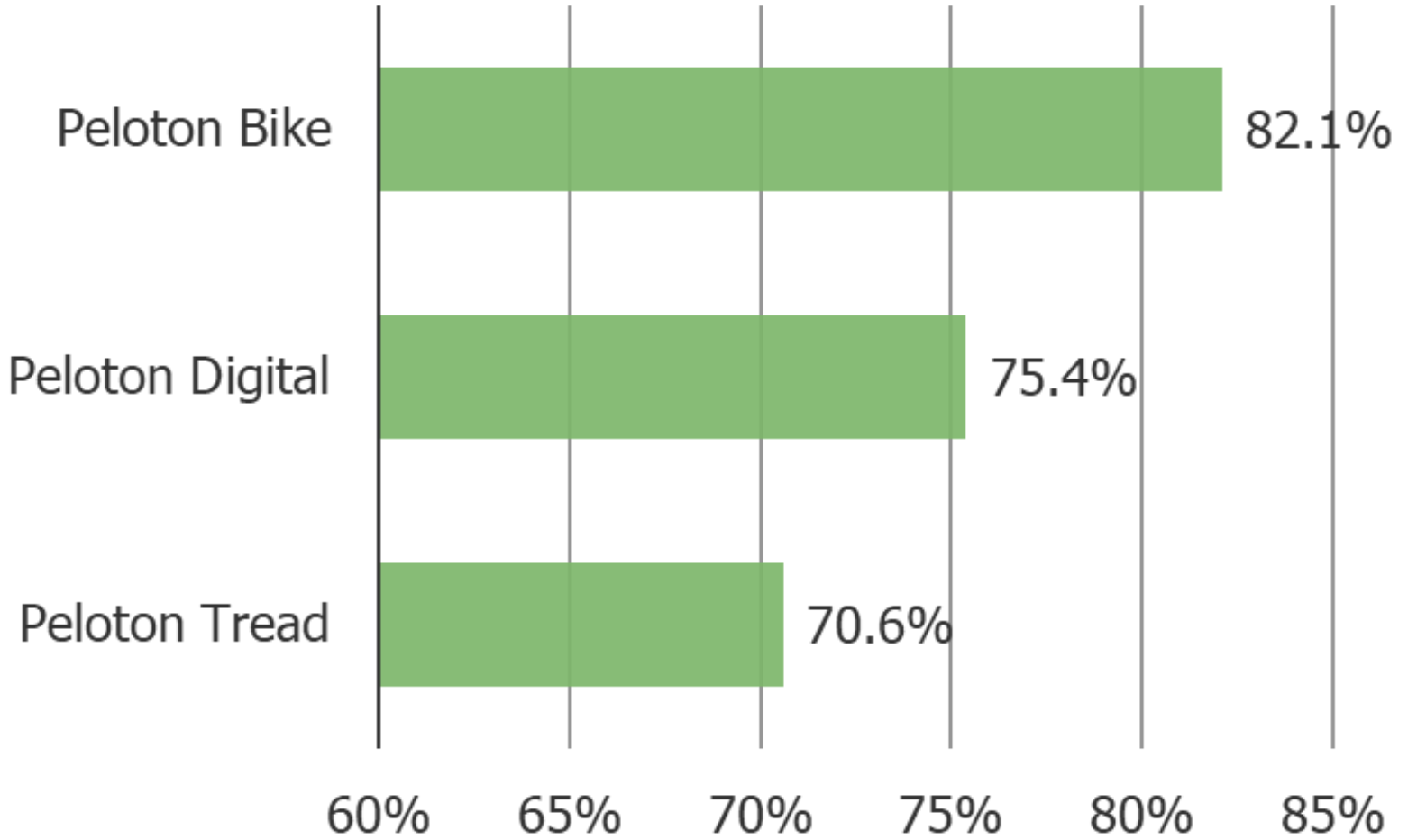


N=69



WHICH OF THE FOLLOWING PELOTON PRODUCTS DO YOU OWN?

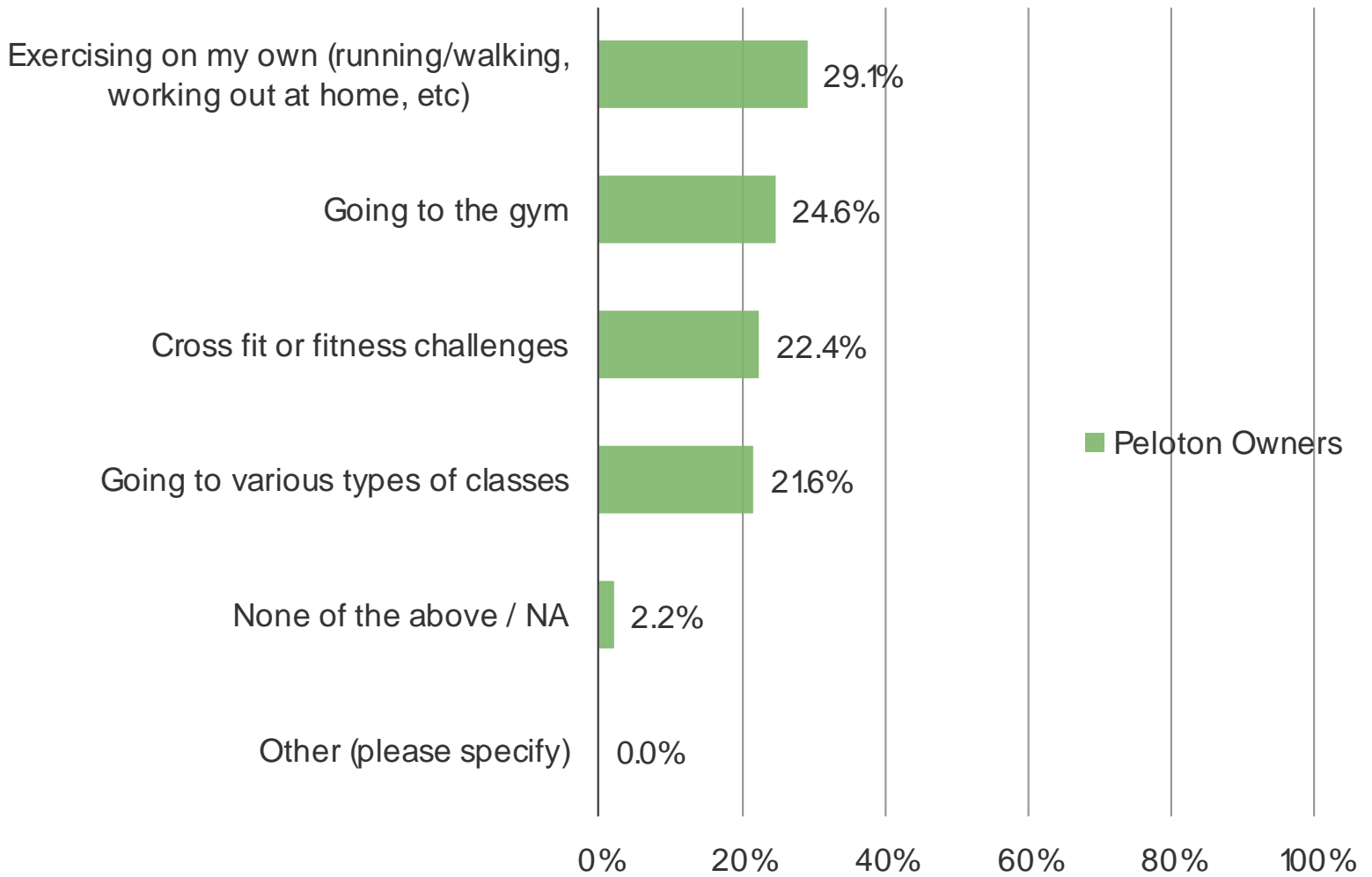
Posed to Peloton owners



N=69

HOW DO YOU TYPICALLY WORK OUT? (SELECT ALL THAT APPLY)

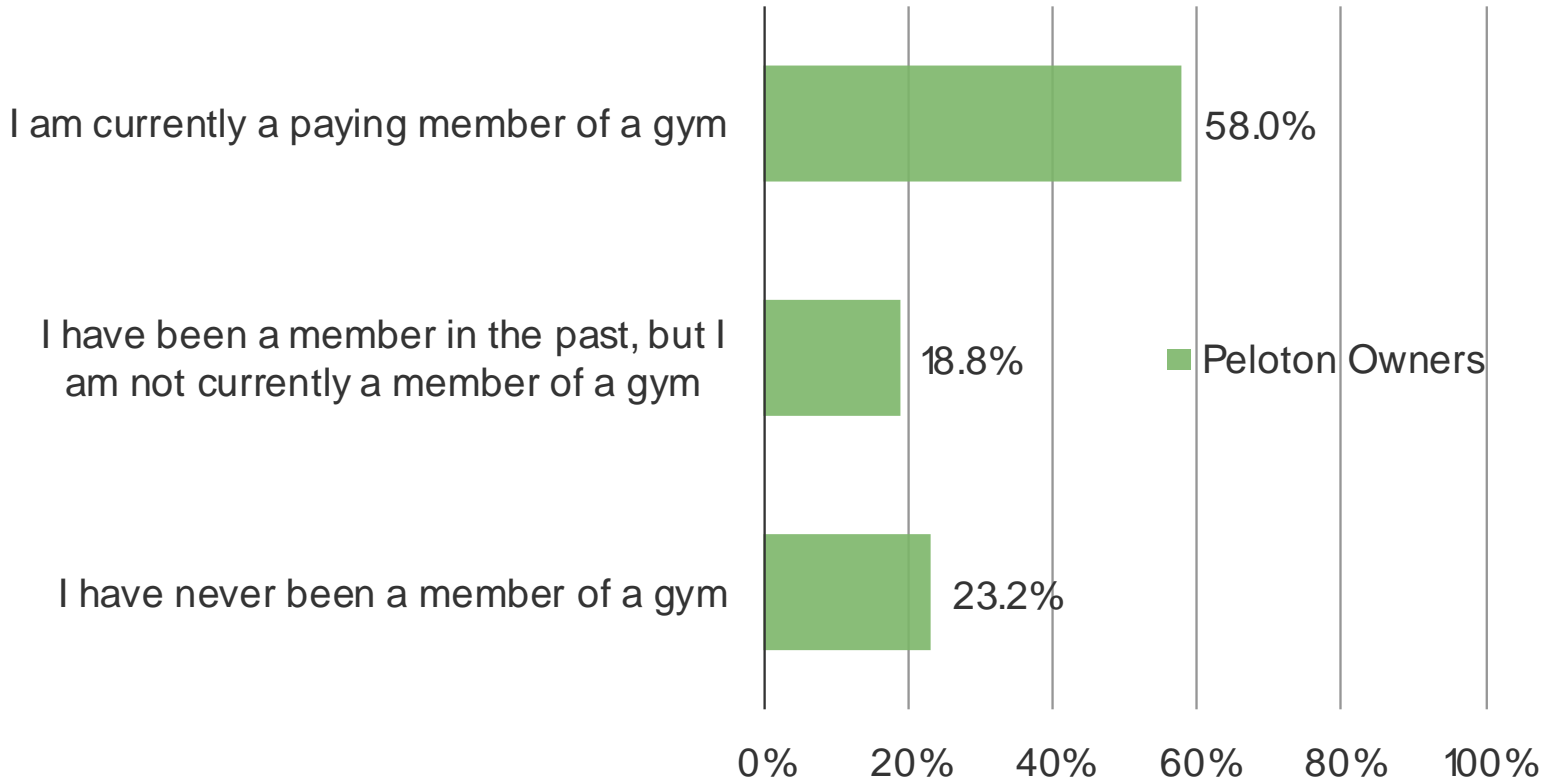
Posed to Peloton owners



N=67

EXPERIENCE WITH FITNESS GYMS

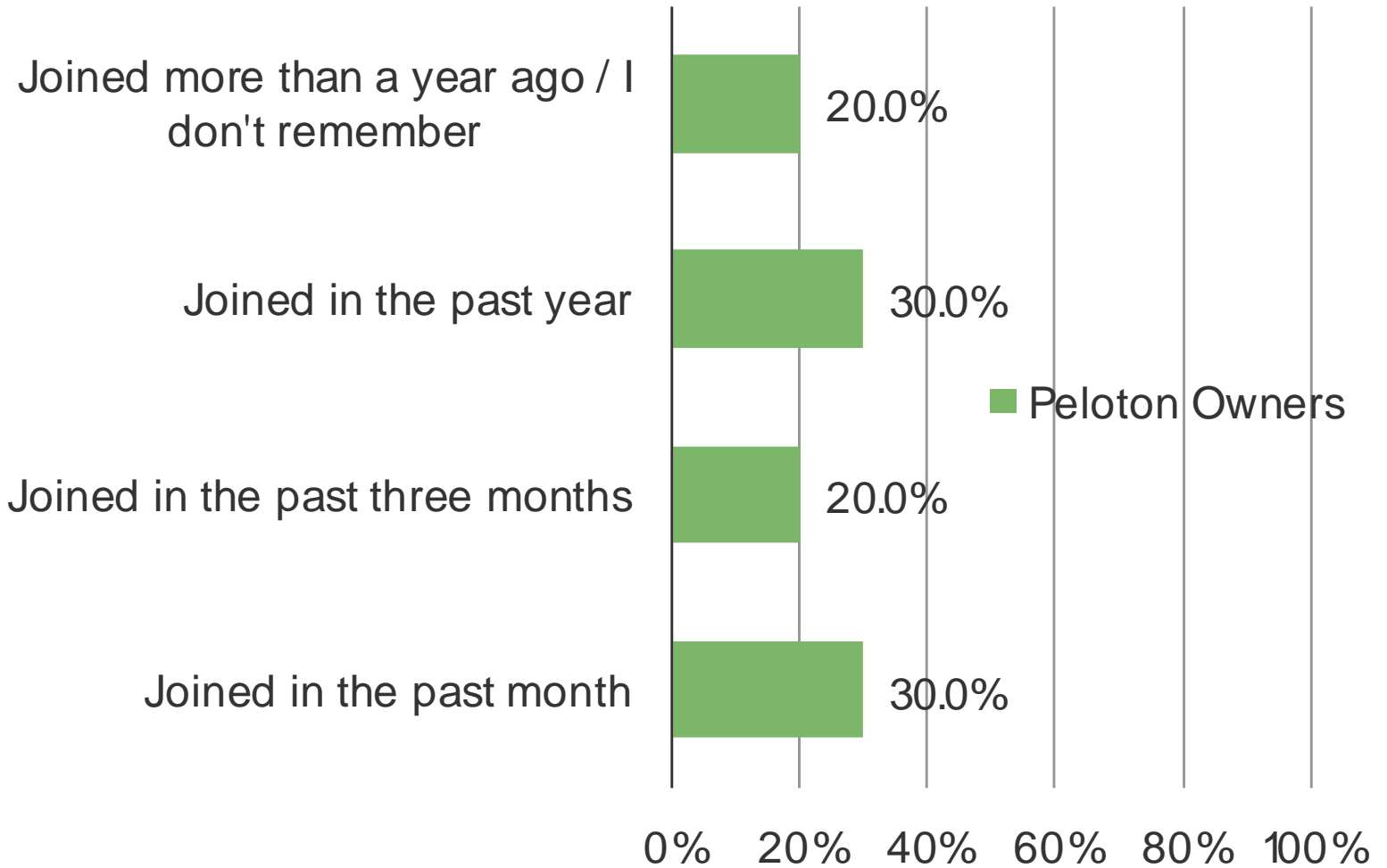
Posed to Peloton owners



N=69

HOW LONG HAVE YOU BEEN A GYM MEMBER?

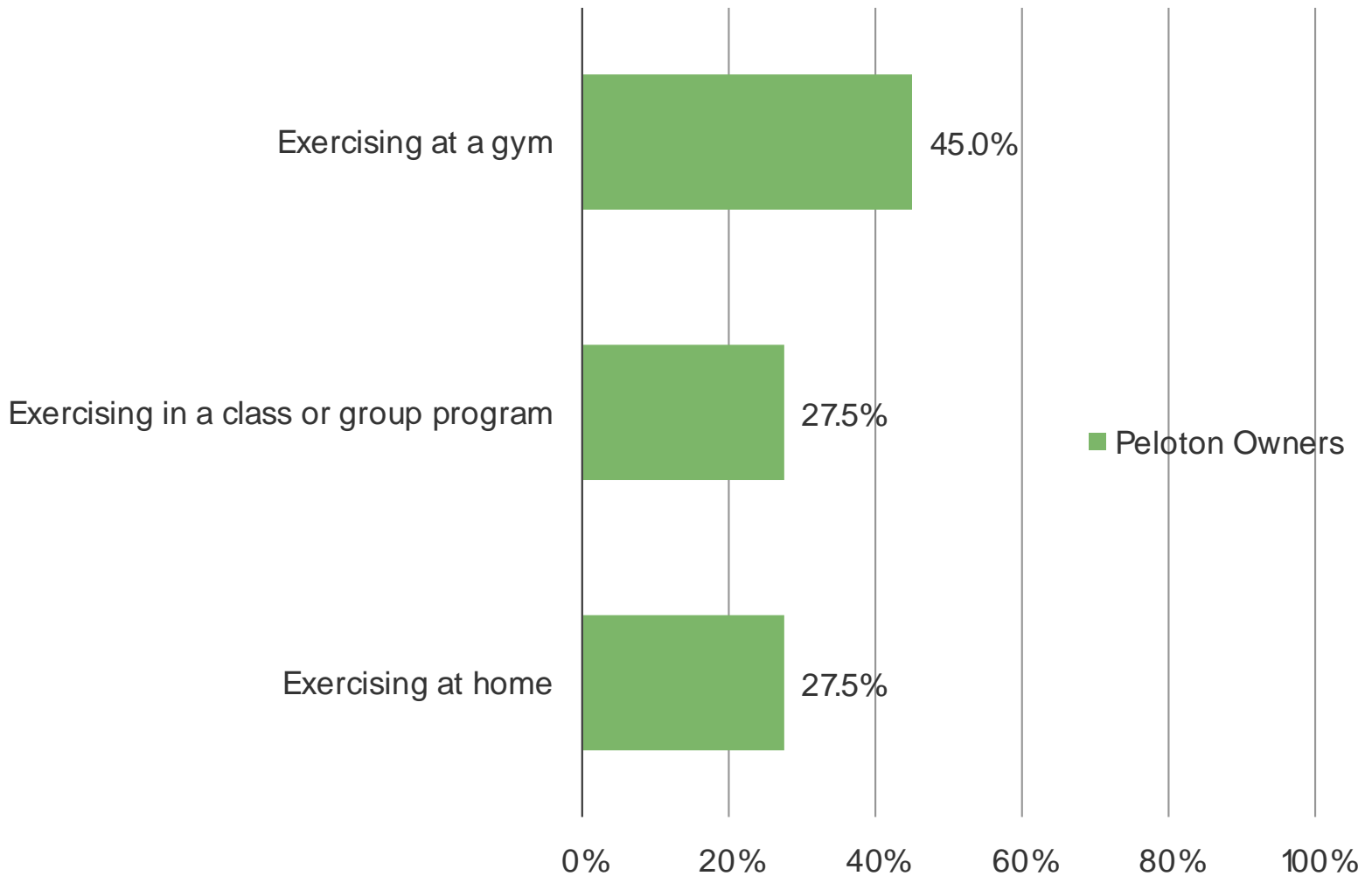
Posed to respondents WITH gym memberships



N=40

WHICH IS BETTER FOR YOU?

Posed to Peloton owners who have participated in ALL three of these activities



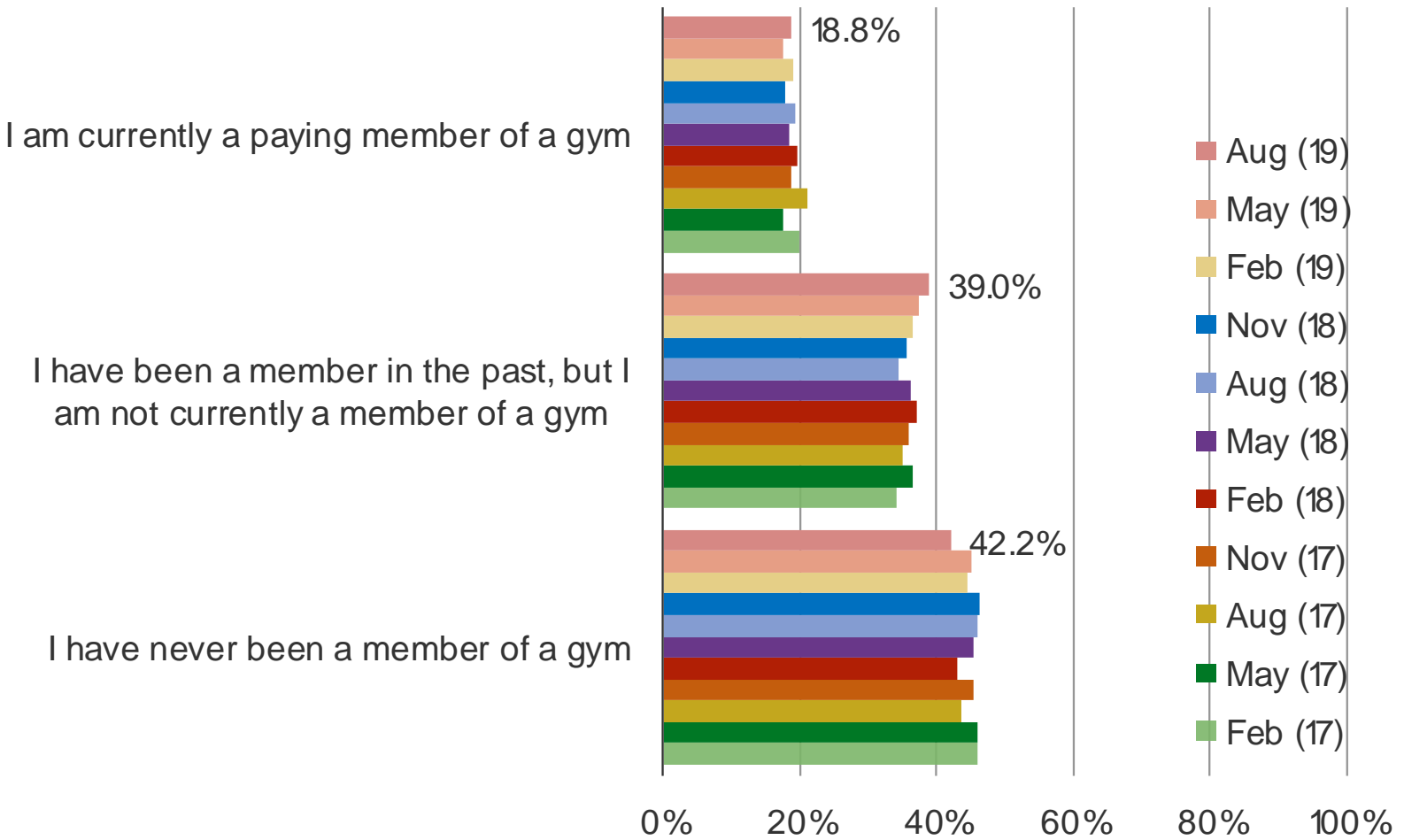
N=40

Conjoint analysis shows that

## RESPONDENTS WITH GYM MEMBERSHIPS

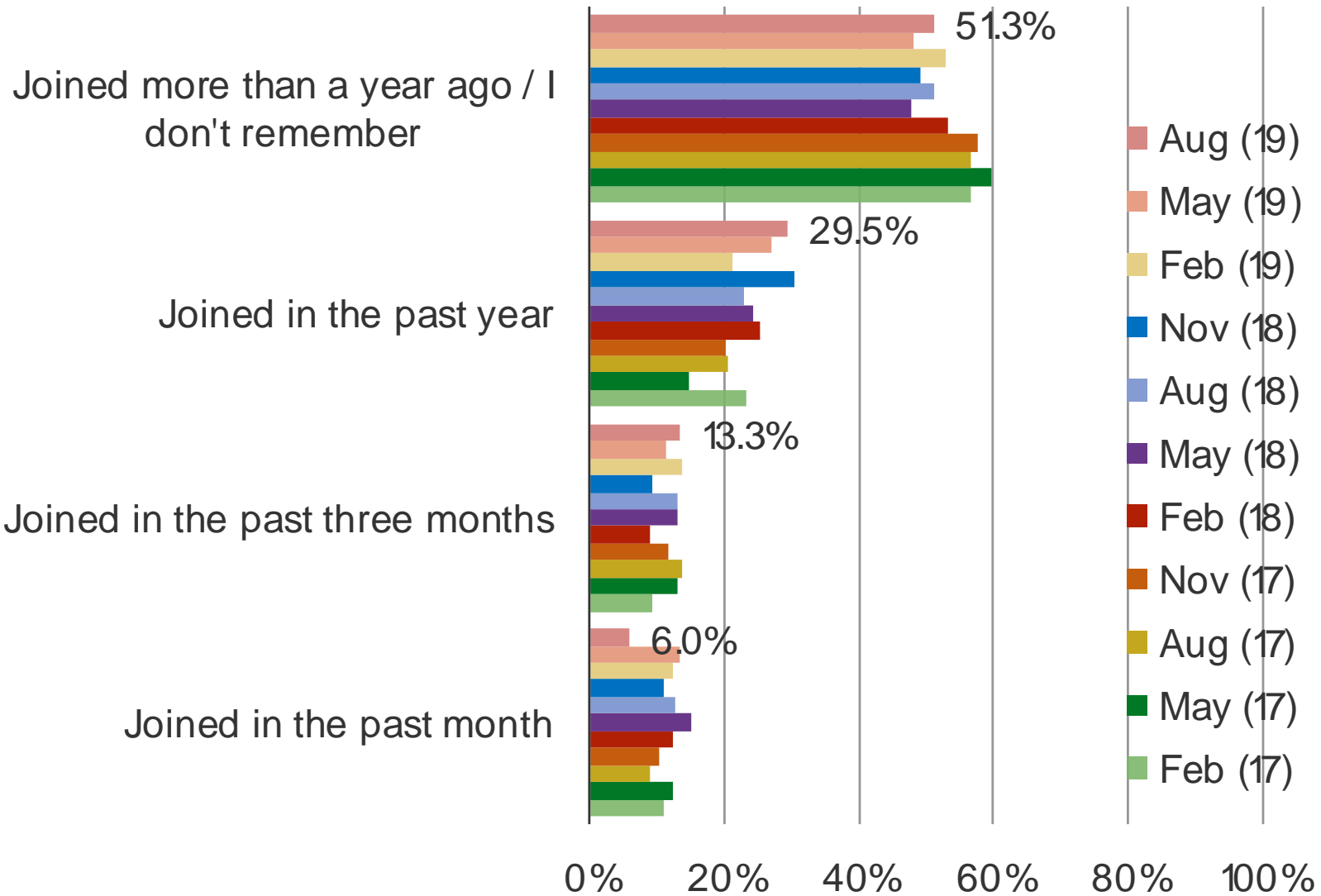
EXPERIENCE WITH FITNESS GYMS

Posed to all respondents



HOW LONG HAVE YOU BEEN A GYM MEMBER?

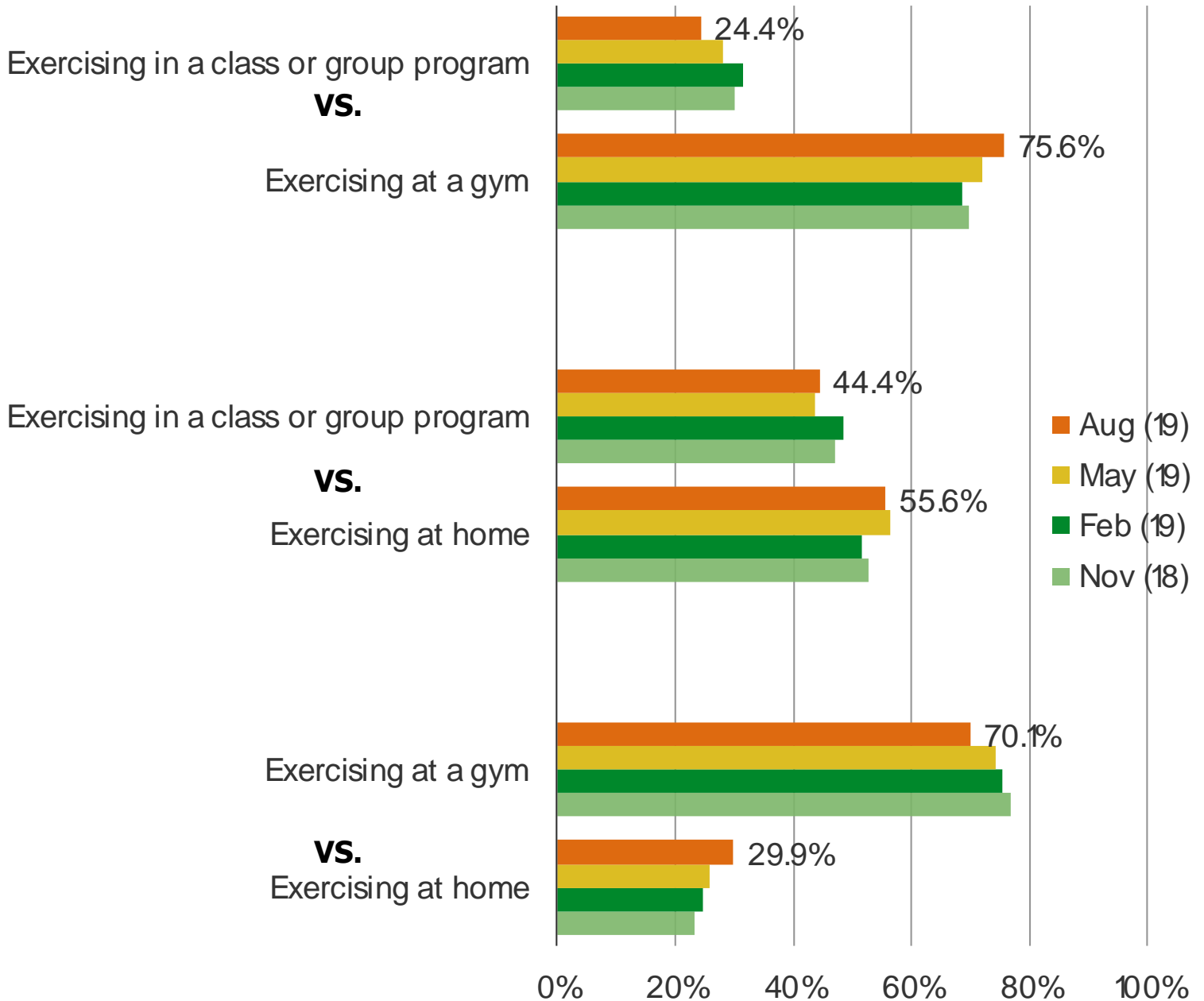
Posed to respondents WITH gym memberships





WHICH IS BETTER FOR YOU?

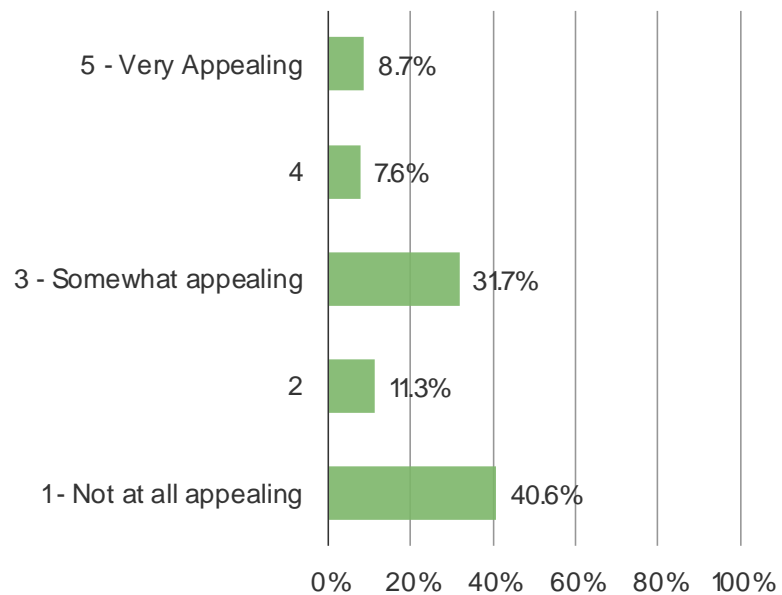
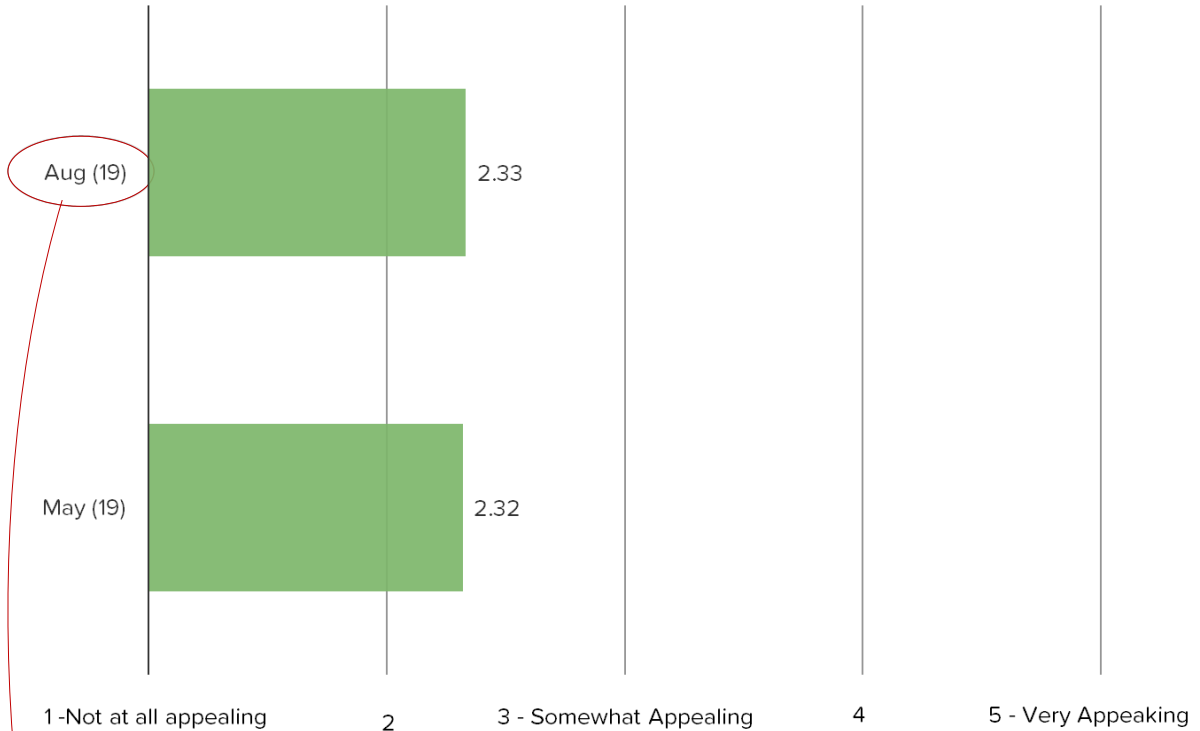
Posed to respondents WITH gym memberships



At a gym is preferred most, followed by at home, and then in a class or group program.

WOULD YOU FIND IT APPEALING TO BE ABLE TO PARTICIPATE IN AN EXERCISE CLASS ENVIRONMENT WHERE YOU WATCH A LIVE INSTRUCTOR AND COMPETE AGAINST OTHER PEOPLE FROM YOUR OWN HOME?

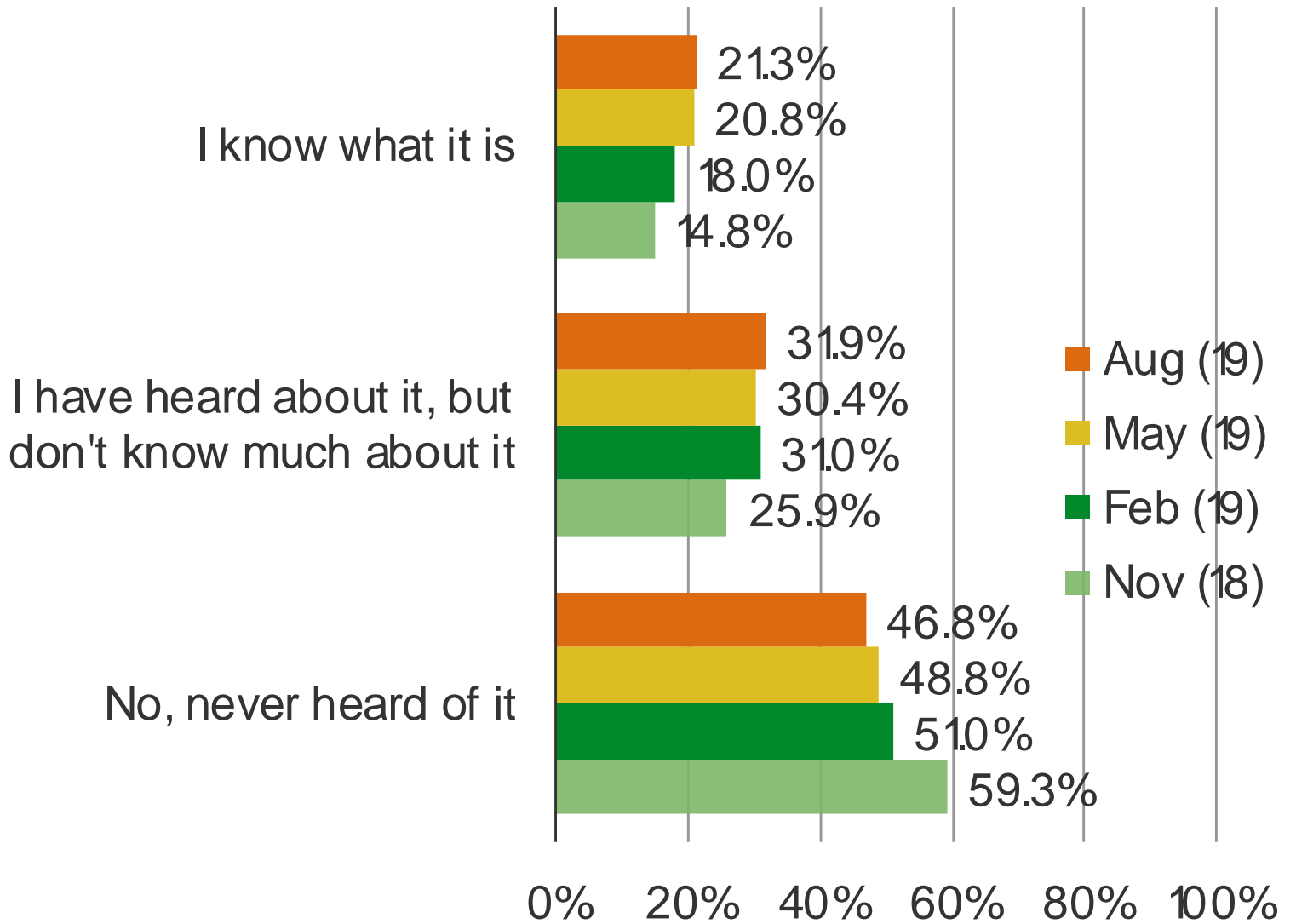
Posed to respondents WITH gym memberships



# BROADER CONSUMER FAMILIARITY WITH PELOTON AND OPINION

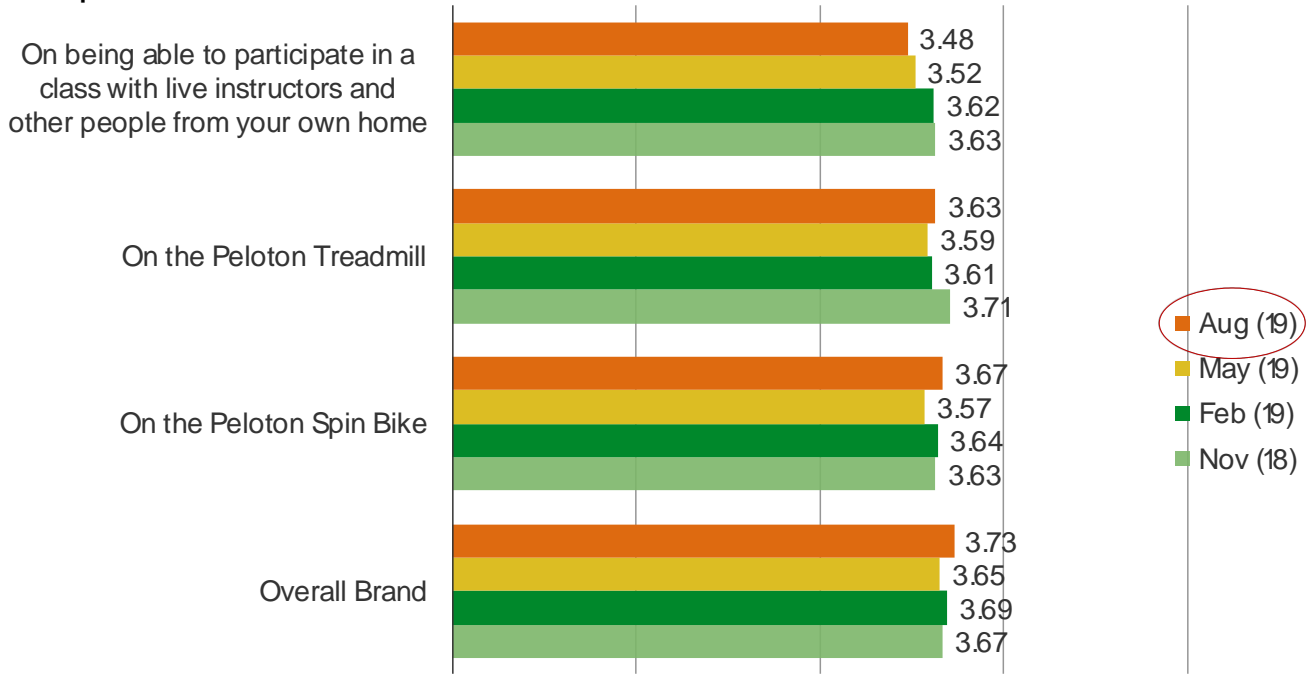
ARE YOU AWARE OF THE PELOTON EXERCISE EQUIPMENT BRAND?

Posed to all respondents



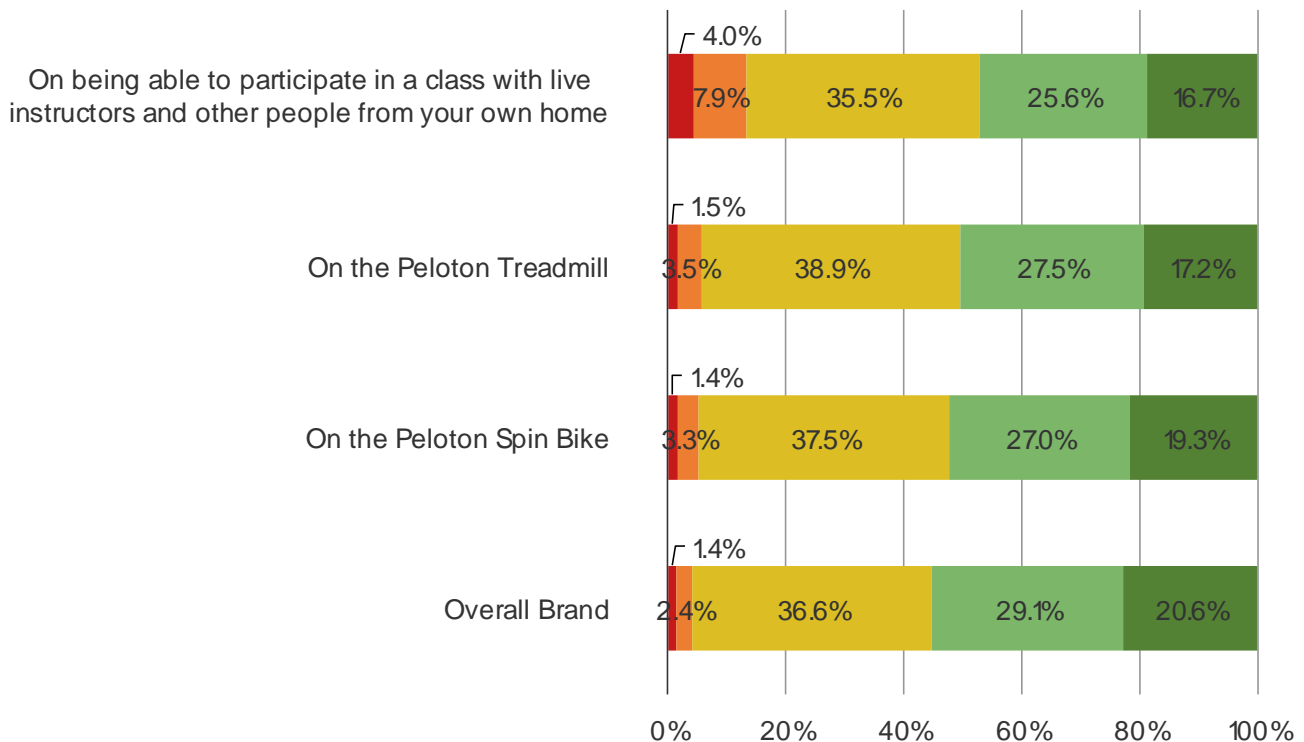
WHAT IS YOUR OPINION OF THE PELOTON BRAND?

Posed to respondents **who are aware of Peloton**



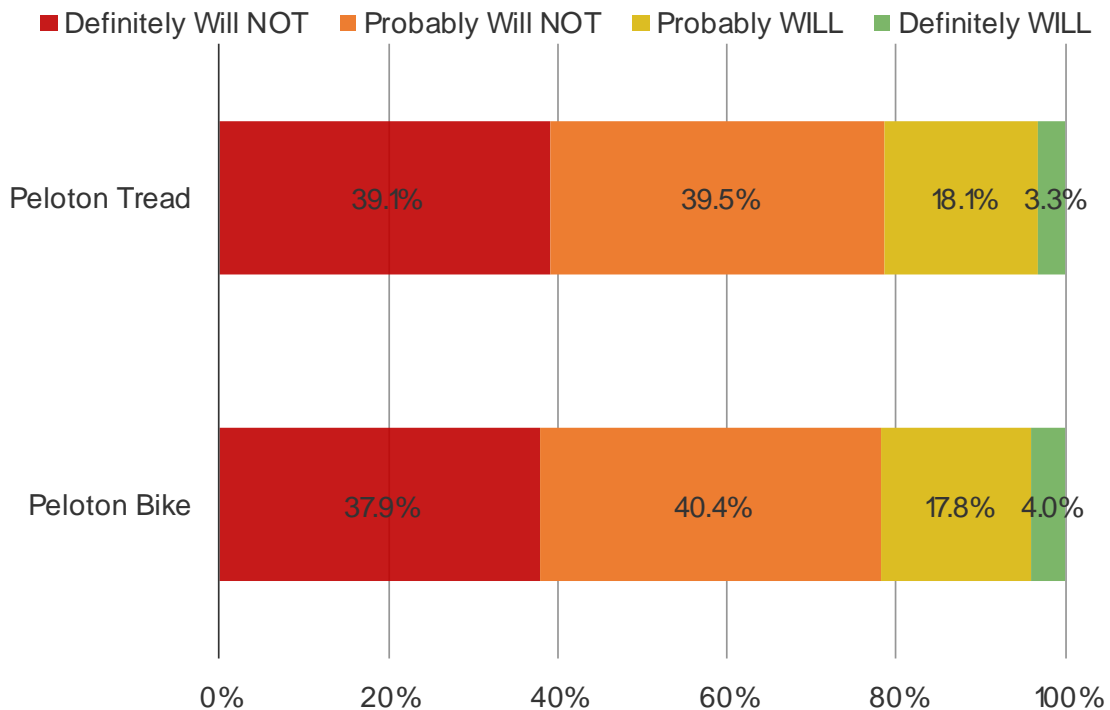
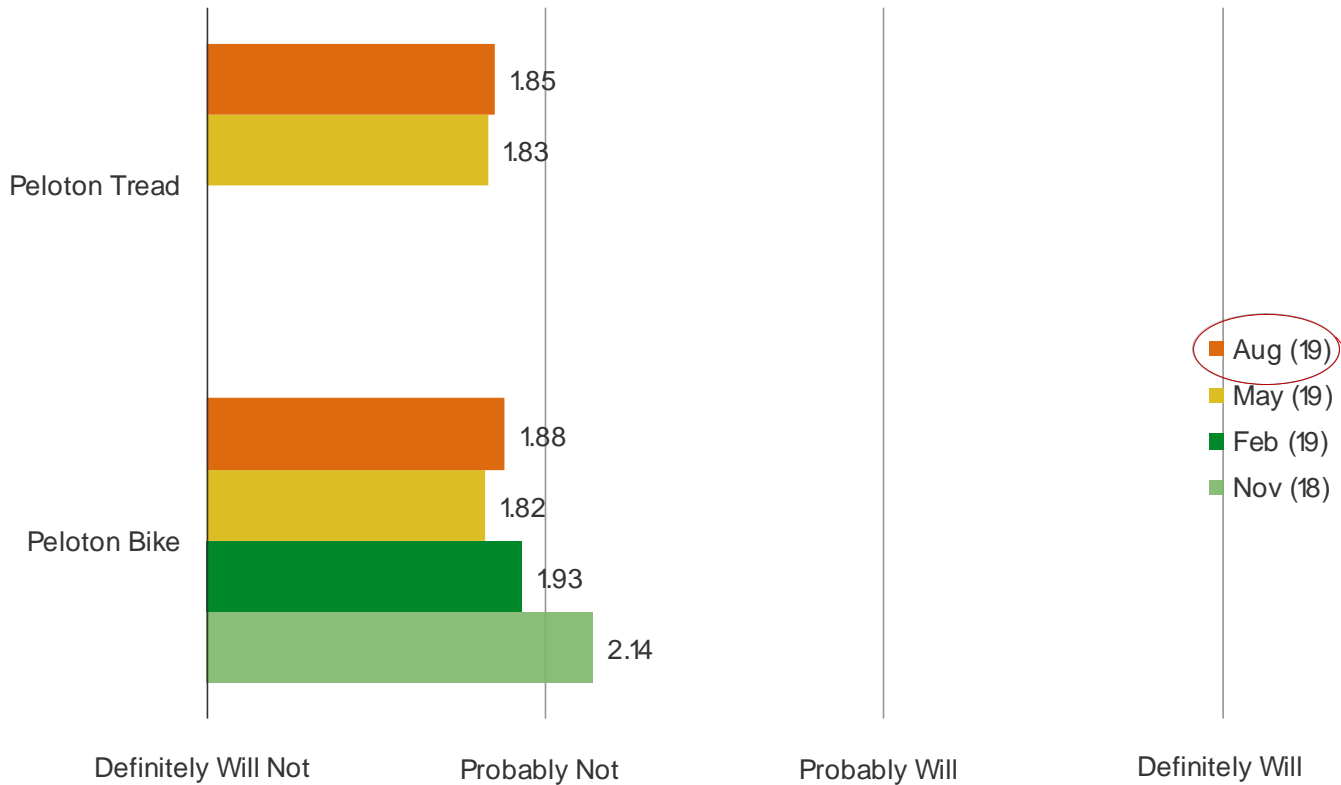
Very Negative    Negative    Neutral    Positive    Very Positive

■ Very Negative    ■ Negative    ■ Neutral    ■ Positive    ■ Very Positive



HOW LIKELY ARE YOU TO BUY THE PELOTON EQUIPMENT IN THE FUTURE?

Posed to respondents who are aware of Peloton but do not own any Peloton equipment.



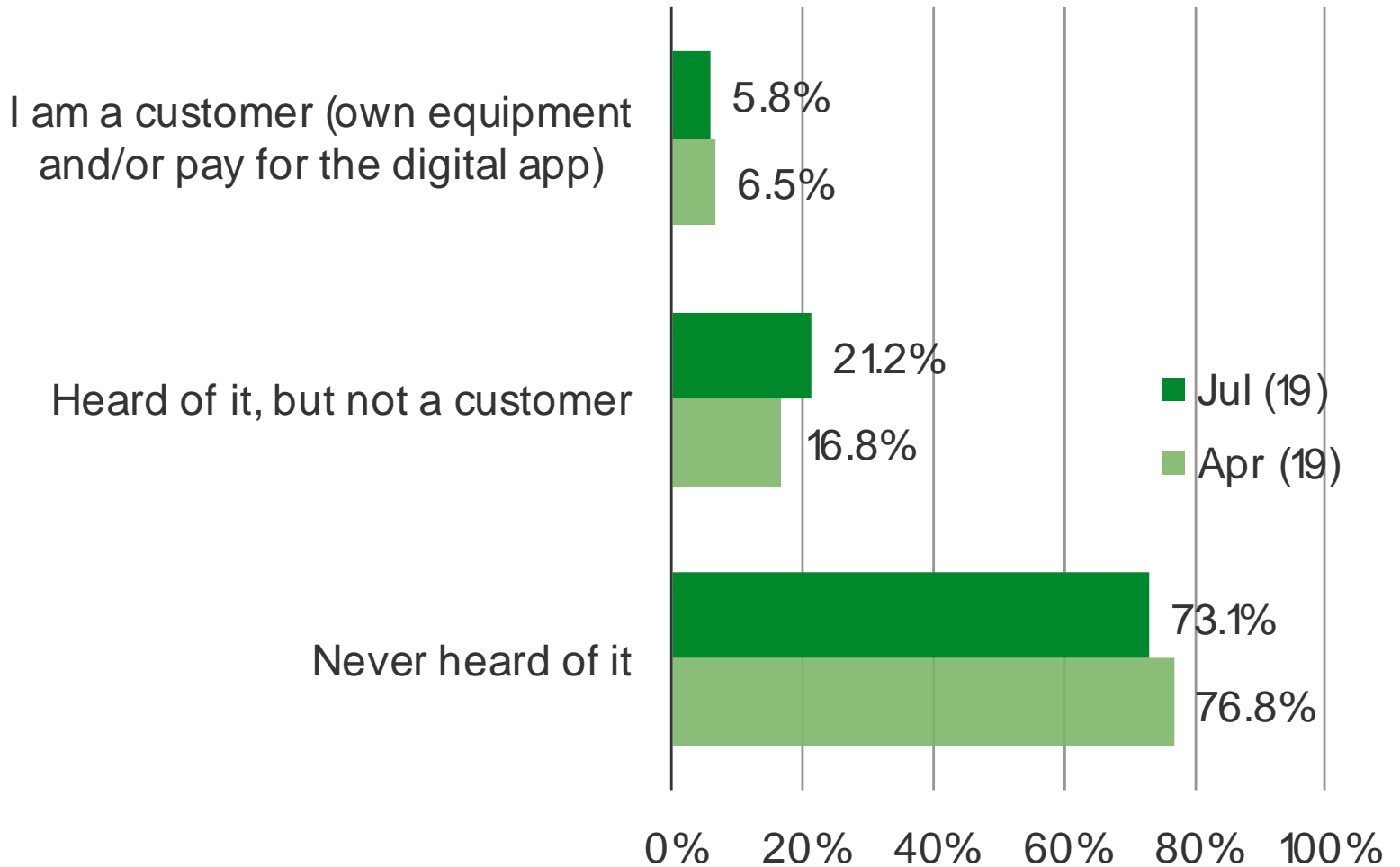


## PELOTON IN THE UK



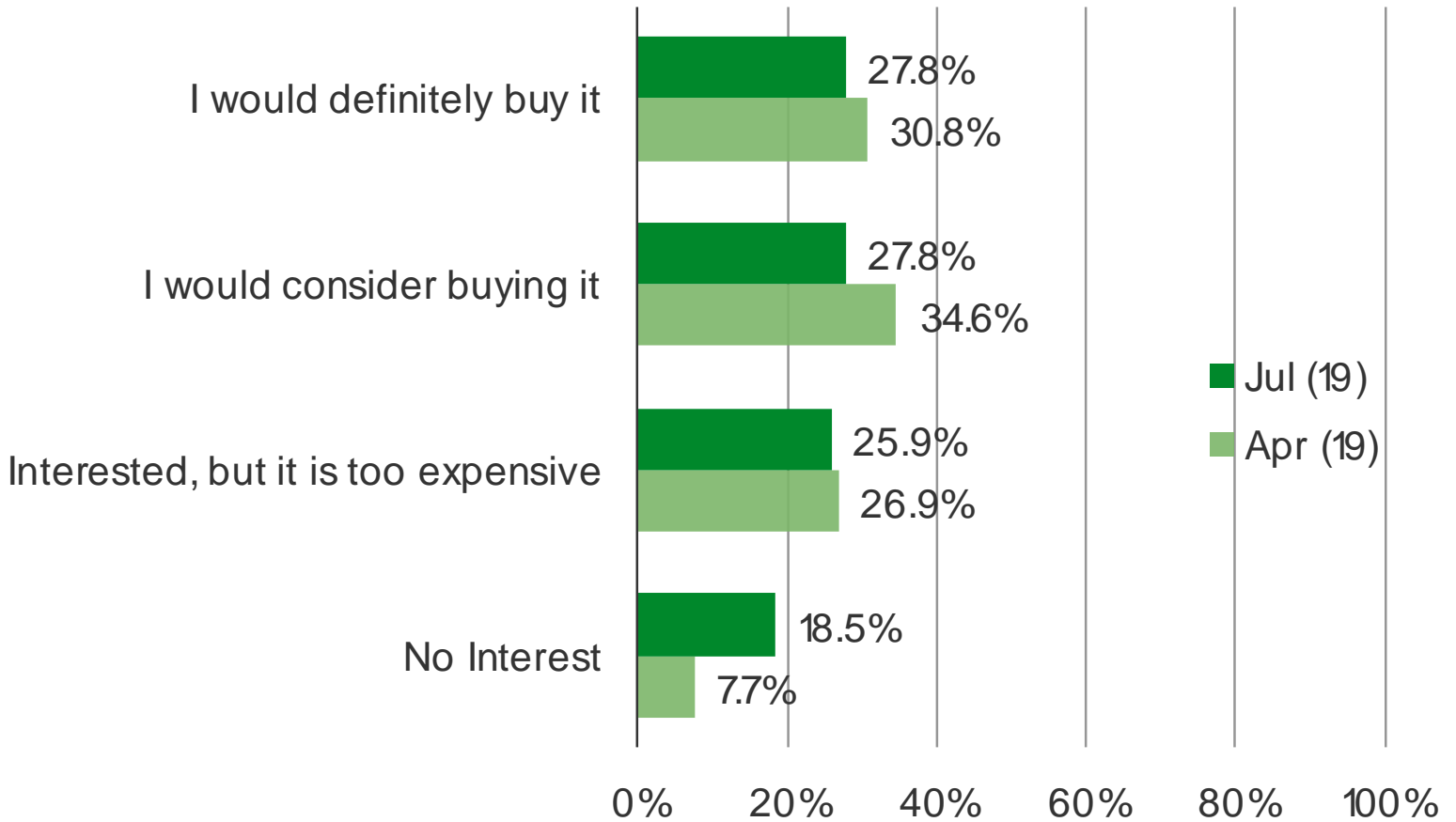
WHAT IS YOUR EXPERIENCE WITH PELOTON?

Posed to all respondents.



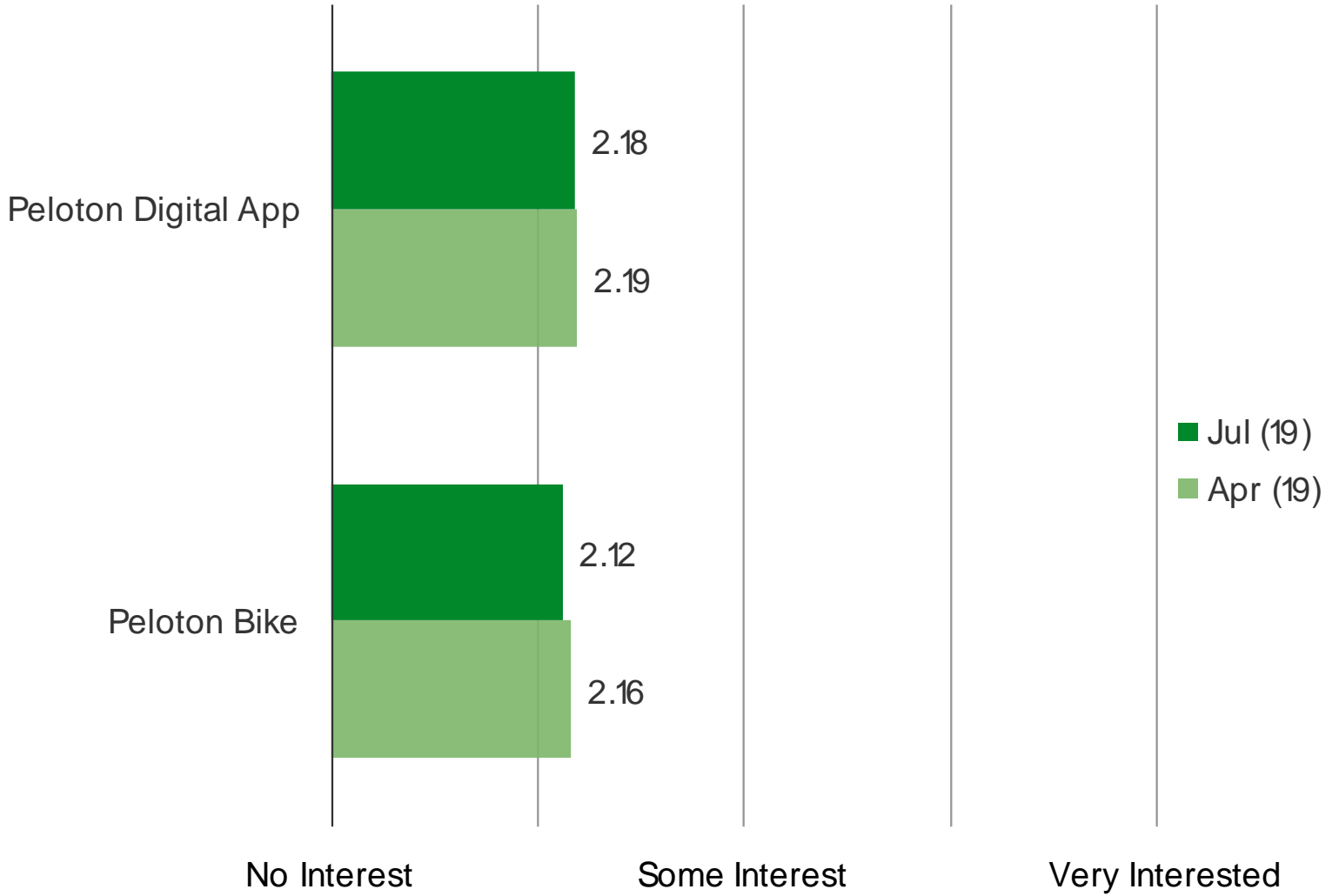
HOW MUCH INTEREST WOULD YOU HAVE IN THE PELOTON TREAD?

Posed to Peloton customers.



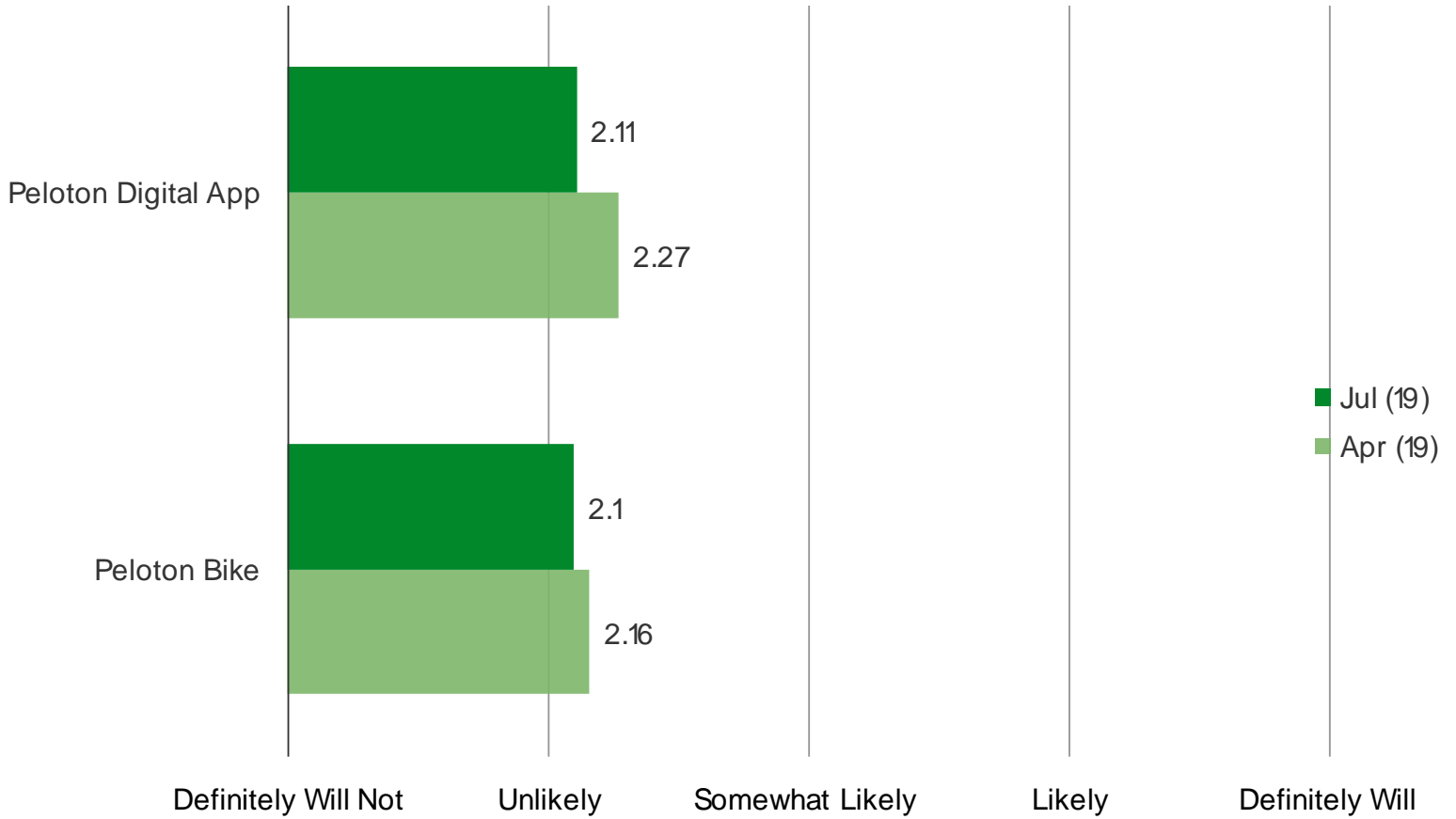
HOW MUCH INTEREST DO YOU HAVE IN THE FOLLOWING?

Posed to respondents who are aware of Peloton but do not own any Peloton equipment.



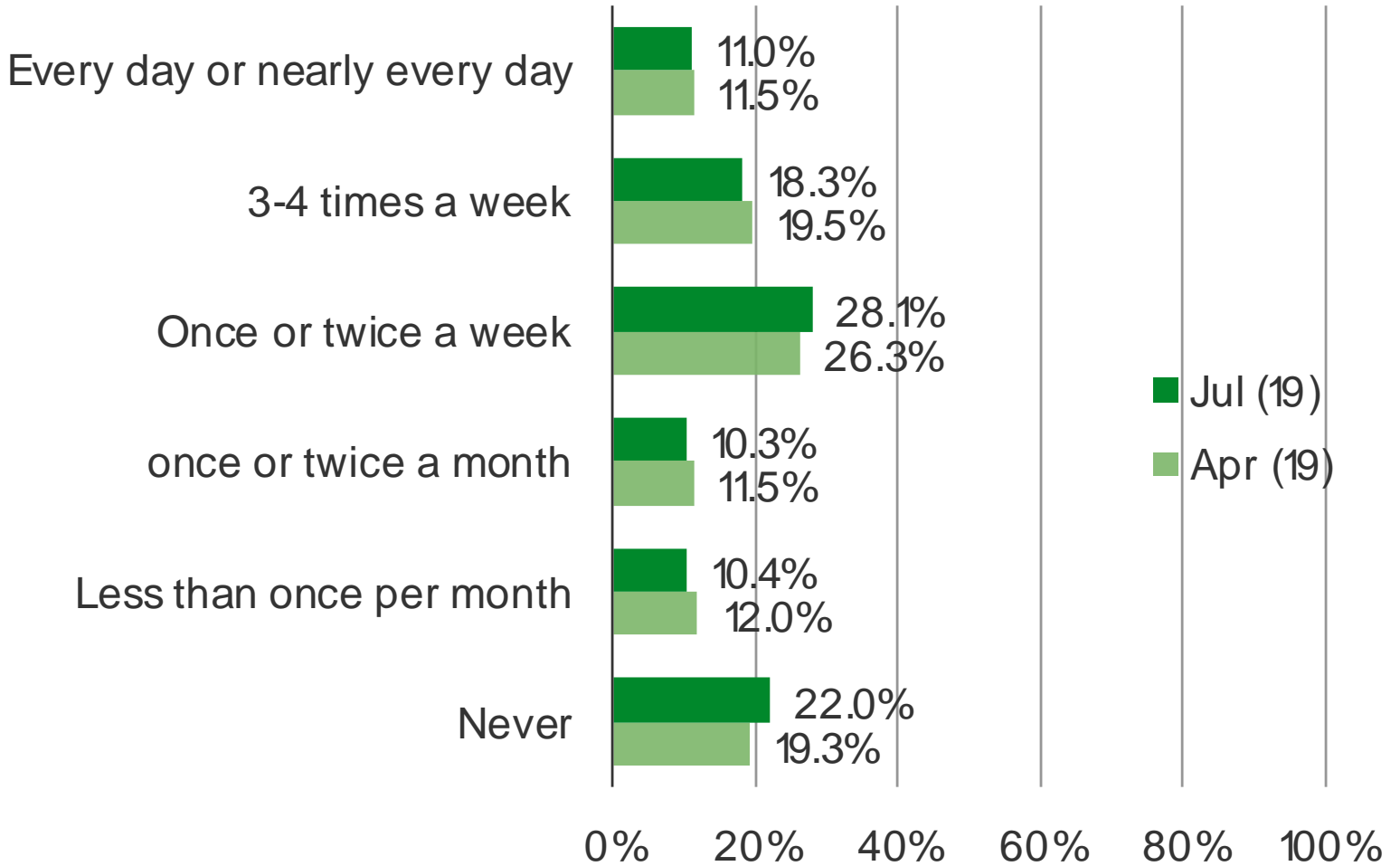
HOW LIKELY ARE YOU TO PURCHASE THE FOLLOWING IN THE NEXT YEAR?

Posed to respondents who are aware of Peloton but do not own any Peloton equipment.



HOW OFTEN DO YOU EXERCISE?

Posed to all respondents.



DO YOU BELONG TO A GYM?

Posed to respondents who exercise.

