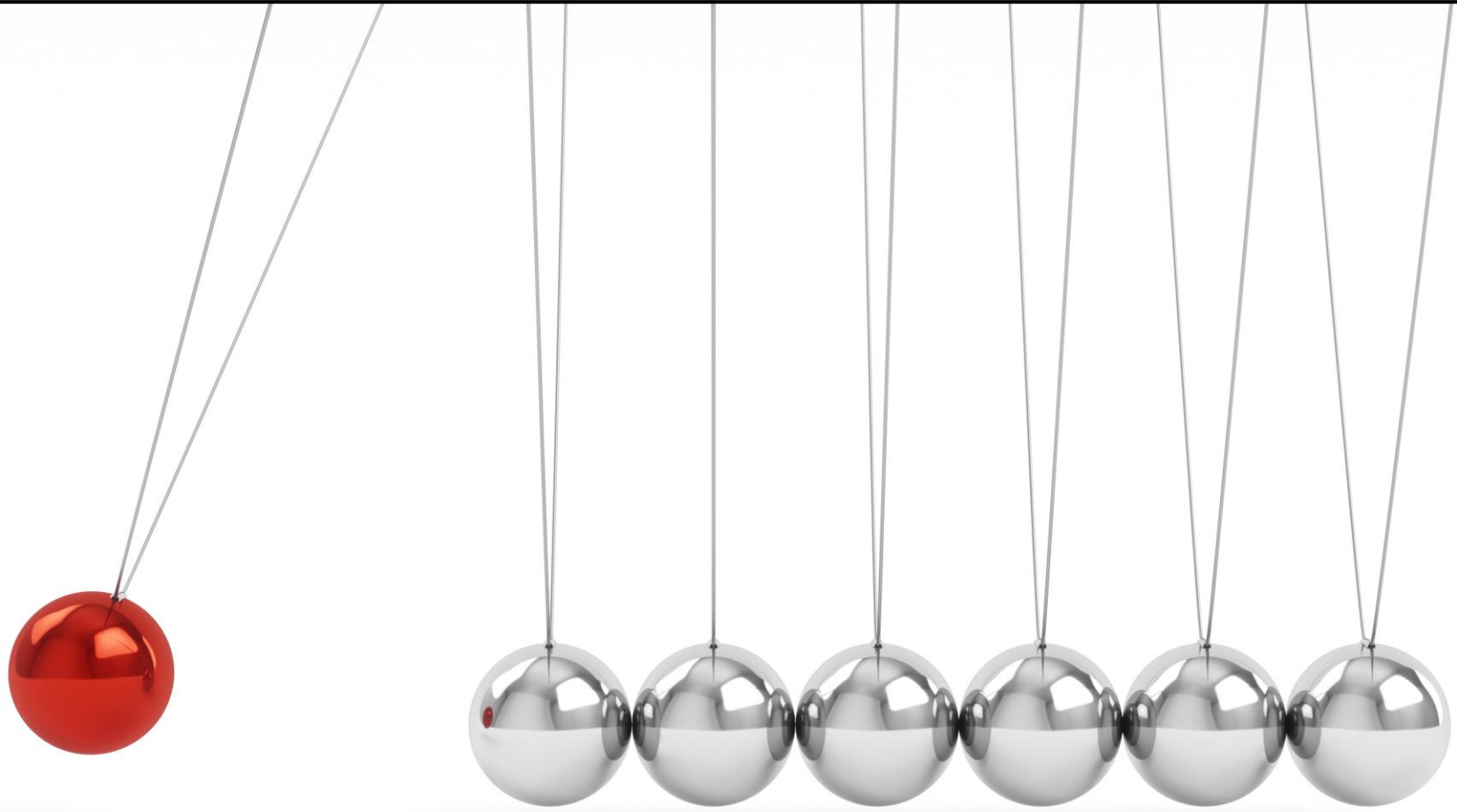


THE FIVE | SURVEY HIGHLIGHTS

The Top 5% of Charts From Our 2,000+ Pages of Surveys This Quarter



Summary Notes and Observations

Overview: When The Arc of Change Gets Shocked

The arc of change in the consumer is typically long and bends over time in one direction or another. This much we have learned from having conducted thousands of longitudinal surveys with them over the past decade. Often without warning, though, exogenous shocks can collide with consumers to change their behavior more rapidly - evoking imagery (for us) of Newton's Cradle. The first very significant exogenous shock that we watched unfold with consumers since we started surveying them in 2012 was the beginning of Covid in early 2020. The momentum drove significant behavioral change and shift in sentiment. Changes we just don't typically see. The changes were positive for some sectors/companies and negative for others, and the momentum from the exogenous shock was compounded by excess liquidity, supply shortages, and people being thrown from their typical work and leisure schedules.

Some of the most important questions we have been grappling with since the start of Covid have included: a) how much of the behavioral change due to Covid will stick vs. how much will regress? – the answer in most cases is some, but not all... b) how much demand/TAM was pulled forward for Covid winners? c) How much pent-up demand is there for Covid losers?

In the past few months of looking at our survey data as it has been coming back, it felt like there were two new balls in our Newton's Cradle analogy striking consumers a) the UNWIND of Covid concern and b) Inflation/Gas Prices.

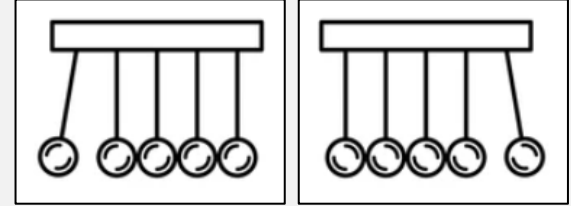
We found ourselves often saying things like "xyz trend declined from Covid highs, but the data remains above pre-Covid levels" (food delivery usage, grocery delivery, streaming usage, social media usage, at-home fitness interest, online shopping, etc) or found ourselves flagging increased demand for things like travel, shopping in-stores, clothing, etc. We also often pointed out an increased emphasis placed on pricing by consumers in recent months and tempered commentary around sectors with pent-up demand by flagging that some portion of consumers who have pent-up demand are also telling us their spending plans have been impacted by inflation.

While paying attention to the arc of consumer change, we remain focused on gathering actionable primary source feedback on key investment debates – some of the most popular ones we are being asked about recently listed below...

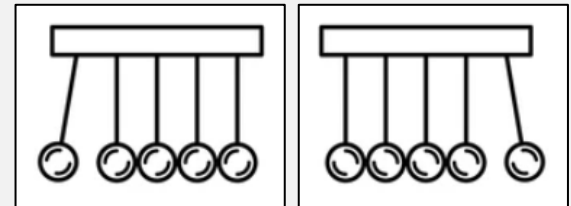
Top Investment Debates:

1. CVNA | Customer Satisfaction Tracked Over Time / Financing and Insurance Ops.
2. META (Facebook and Instagram) vs. TikTok.
3. TAM Exploration | PTON, SFIX, SNAP Subscription, BYND, OTLY, YETI, CROX.
4. Boats and RVs.
5. Realtors and Zillow Flex / Home Builders.
6. Fixed Wireless Interest and Satisfaction | TMUS and VZ.
7. NFLX and Peers | Ad-Supported Tiers, Account Sharing, etc.
8. Strength of Customer Relationships (BBWI, CROX, OLPX, etc).
9. Wayfair vs. Amazon Cross-Shopping and Identical Items Pricing Analysis.
10. Augmented Reality and Shopping, Social Commerce.

Initial Covid Headwinds and Tailwinds



Covid Unwind and Inflation/Gas Prices



Investment Debates



Macro Notes

US Survey: August Readings

After a brutal run for gas prices, national average prices have fallen every day for the past two calendar months as of the end of August. Series that are sensitive to gas prices have had a major reversal: confidence in the economy rose sequentially, while gauges of inflation expectations plunged as well. On balance, a modest majority of our respondents reported noticing higher gas prices, but the 40.0% that reported lower gas prices was the highest share since May of 2020.

Labor markets also appear to be hot still, with hours back to a similar level as pre-COVID and continuing to rise. Most labor market indicators were improved MoM in August and are stronger than they were a year ago including unemployment rates and concerns about job security.

One area of the economy that has weakened and a remained weak in our latest data is housing. Reported building permit applications, recent purchases, and planned purchases all fell sequentially as well as versus a year go.

Activity has also continued to soften across a range of consumer spending categories. Visits fell across big box and dollar stores as well as department stores. Purchase activity fell across e-commerce, consumer electronics, airlines, and restaurants. Purchase plans for autos also continued to fall. While lower gas prices are likely to be a major tailwind for consumer buying plans and purchase activity, that effect hasn't been felt in full yet.

Investors also continued to get more optimistic after a negative run that ended in the last couple of months; of note, risk tolerance dropped despite higher stock market optimism.

International Surveys: July Readings

China

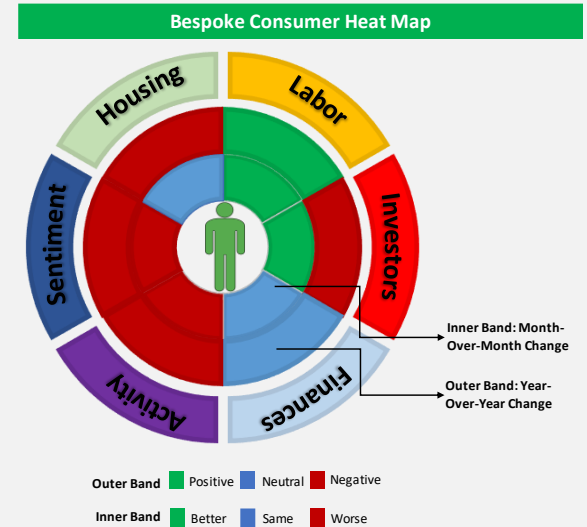
Covid concerns have pulled back from highs but remain worse than consumer feedback in the US, UK and India. Sentiment toward finances have remained mostly consistent, but the percentage of respondents who are trying to reduce spending increased q/q.

UK

Covid concerns have moderated with the share who are not concerned jumping to series highs. Consumer sentiment has moved lower relative to our January update and the percentage of respondents who think the economy will fare much worse in the next 12 months jumped considerably q/q.

India

As of July, concerns with Covid continued to recede and confidence in the economy improved q/q. Consumers are increasingly reporting higher incomes y/y and positive feelings about their personal finances. In contrast to US / UK / China surveys, spending confidence was holding steady in July relative to prior volumes.



Top Charts | Data Inflections or Noteworthy Color

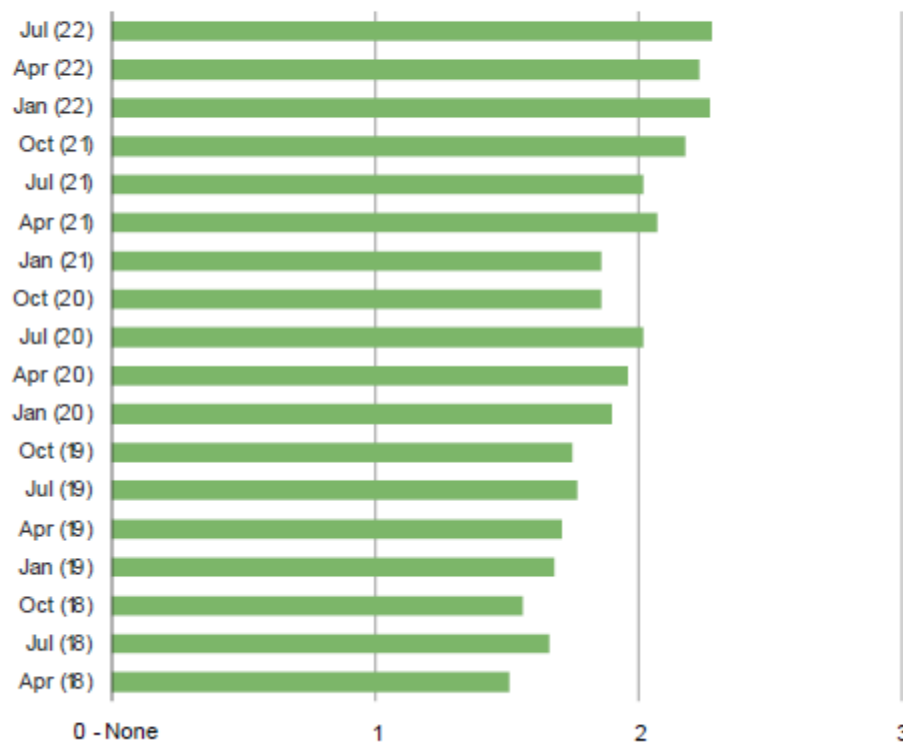
We combed through 2,000+ pages from our research reports published since July and pulled out what we found most interesting (data inflecting or charts providing color on important investment debates).

Number of Streaming Services

Consumer opinion of the right number of streaming video services to be paying for at the same time has been driving higher...

HOW MANY STREAMING VIDEO SERVICES DO YOU THINK IS THE RIGHT NUMBER TO BE PAYING FOR AT THE SAME TIME?

Posed to all respondents.



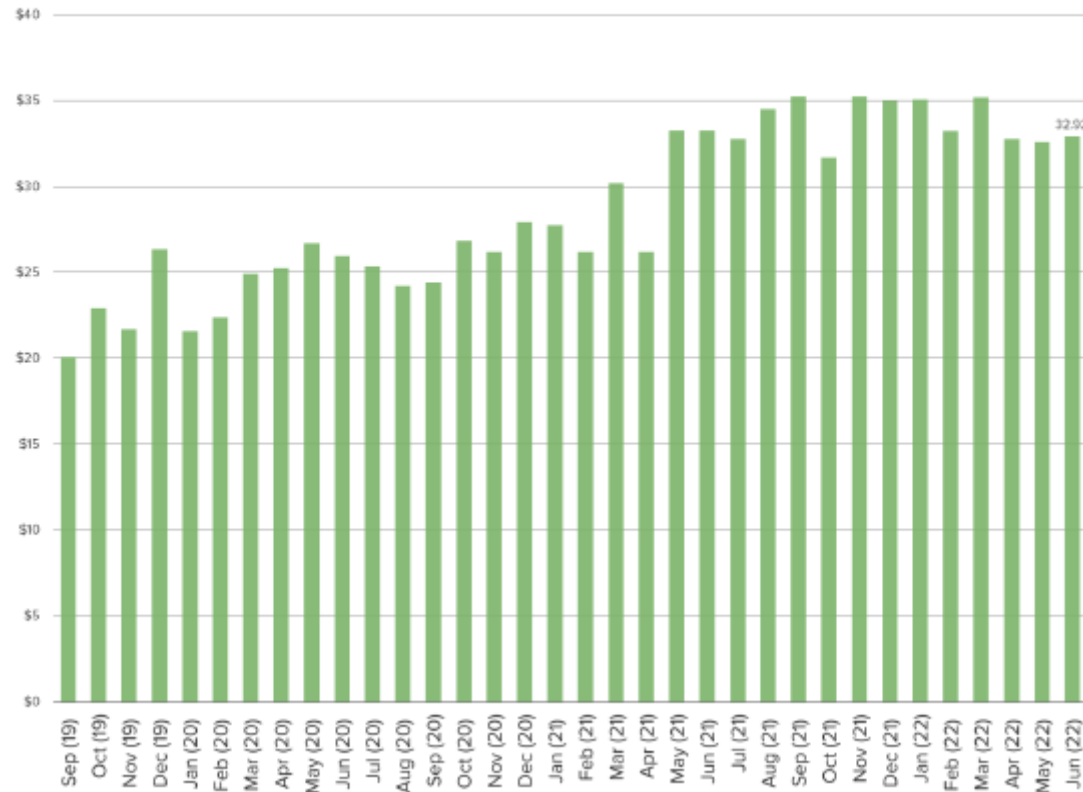
Source: Streaming Video Domestic Survey

Spending on Streaming Services

But the amount of money they feel is appropriate to spend at any given time on streaming video services in total has stalled out in the \$30-\$35 range...

HOW MUCH DO YOU THINK IS APPROPRIATE TO SPEND ON STREAMING VIDEO SERVICES, IN TOTAL, PER MONTH?

Posed to all respondents.



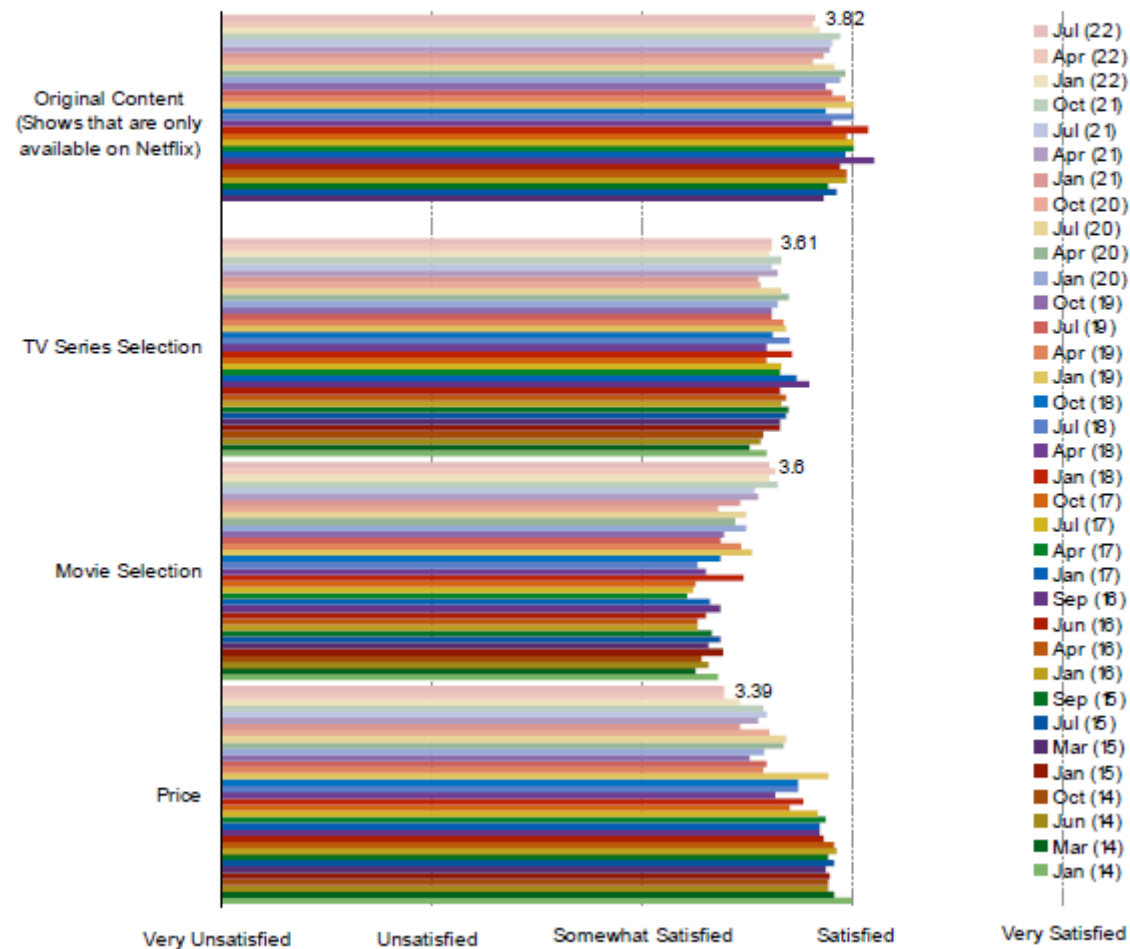
Source: Streaming Video Domestic Survey

NFLX Sub Satisfaction

Netflix subscriber satisfaction with pricing/value has softened over time, while satisfaction with movie selection has improved...

SATISFACTION WITH NETFLIX

Posed to Netflix subscribers.



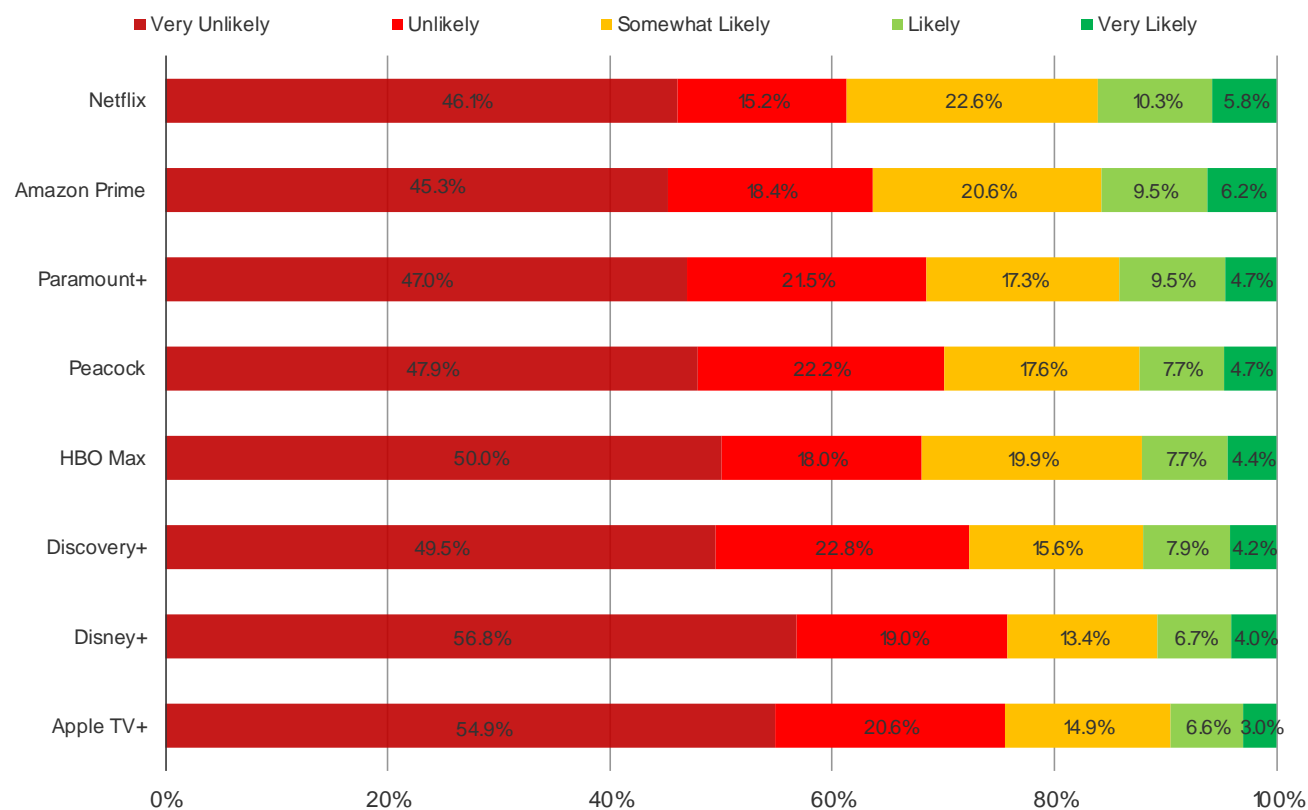
Source: Streaming Video Domestic Survey

Ad-Supported Streaming Video Tiers

Despite high penetration rates, non-Netflix subscribers are the most interested in signing up for an ad-supported tier...

HOW LIKELY WOULD YOU BE TO SUBSCRIBE TO AN AD-SUPPORTED VERSION OF THIS PLATFORM, WITH COMMERCIALS, FOR A LOWER PRICE THAN ITS TYPICAL SUBSCRIPTION PRICE?

Posed to respondents who DO NOT use each of the following to watch video content at home.



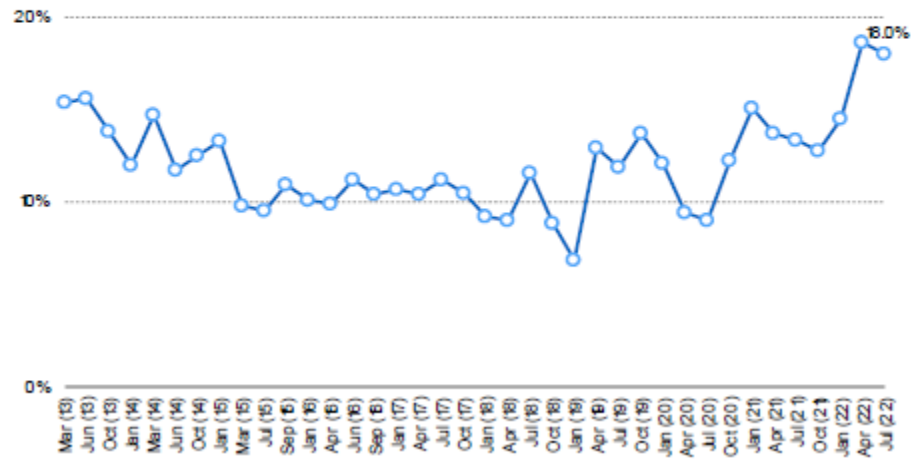
Source: Streaming Video Domestic Survey

NFLX Subs Contemplating Churn

The percentage of subs contemplating cancelling was at series highs in July...

ARE YOU CONSIDERING CANCELLING YOUR NETFLIX SUBSCRIPTION?

Posed to Netflix subscribers.



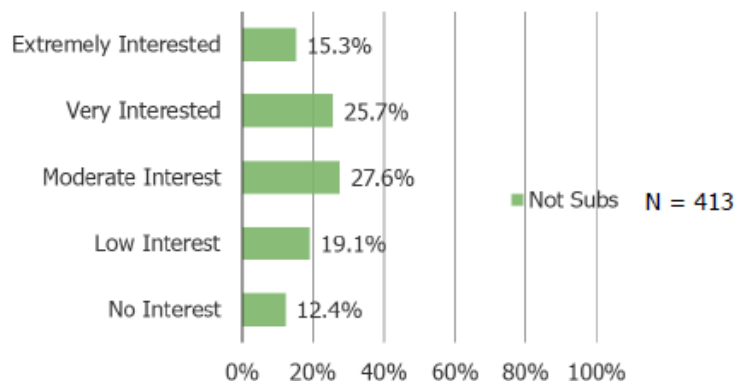
Source: Streaming Video Domestic Survey

Interest in NFLX Ad-Supported Tier in India

A large portion of consumers in India expressed interest in an ad-supported tier. Indications are that an ad-supported tier would drive conversion of those who have been contemplating a subscription...

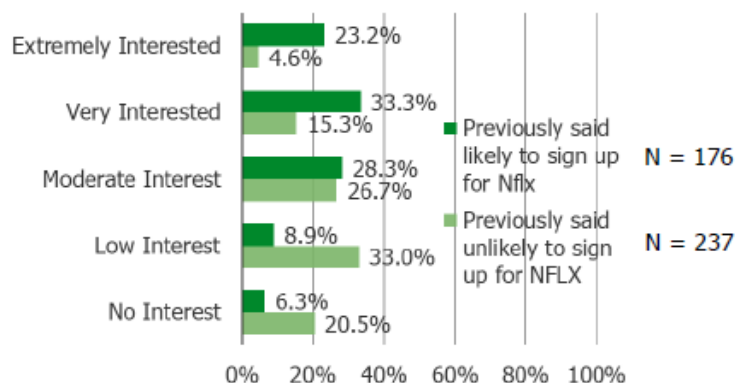
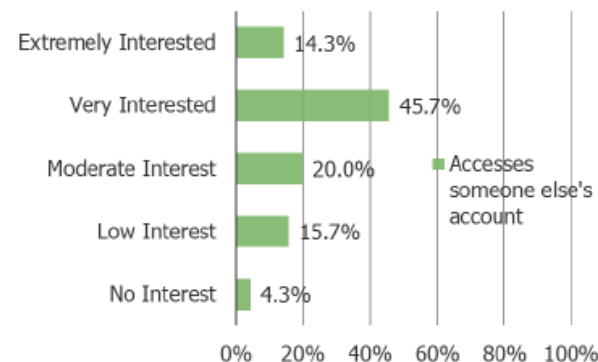
HOW MUCH WILL YOU BE INTERESTED IN THE AD SUPPORTED VERSION OF NETFLIX AT A LOW PRICE?

Posed to respondents who do not currently have a Netflix subscription:



HOW MUCH WILL YOU BE INTERESTED IN THE AD SUPPORTED VERSION OF NETFLIX AT A LOW PRICE?

Posed to respondents who access someone else's Netflix account (N=70).



Source: Streaming Video India Survey

Reasons why consumers in India do not have Netflix

The top reasons for why consumers in India are not Netflix subscribers are related to price/money...

WHY ARE YOU NOT A NETFLIX SUBSCRIBER?

Posed to non-Netflix subscribers



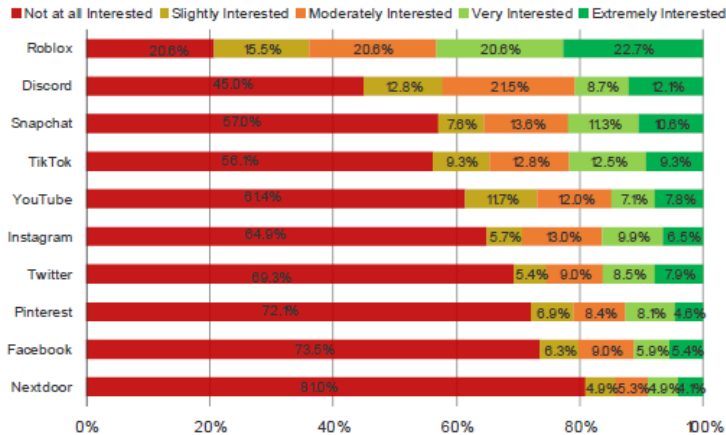
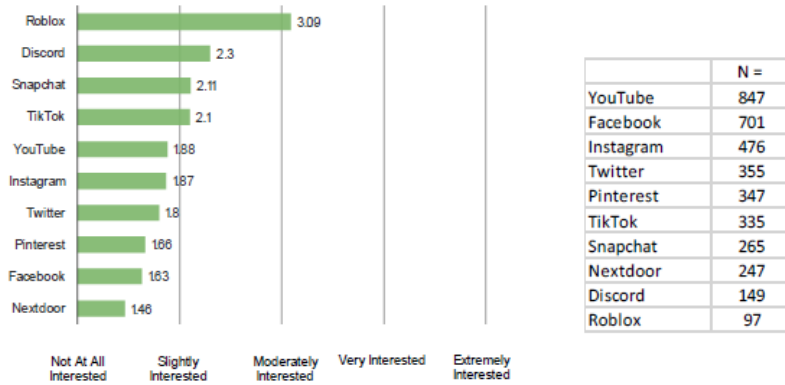
Source: Streaming Video India Survey

Snapchat+ / Willingness to Pay For Social Media Features

Snapchat users are the most likely of social media apps we test to be interested in paying for premium features...

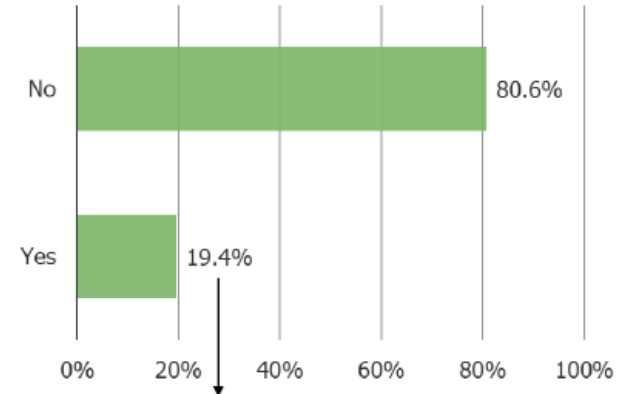
HOW MUCH INTEREST WOULD YOU HAVE IN PAYING TO GET PREMIUM FEATURES ON THE FOLLOWING?

This question was posed to all respondents who use each of the below.

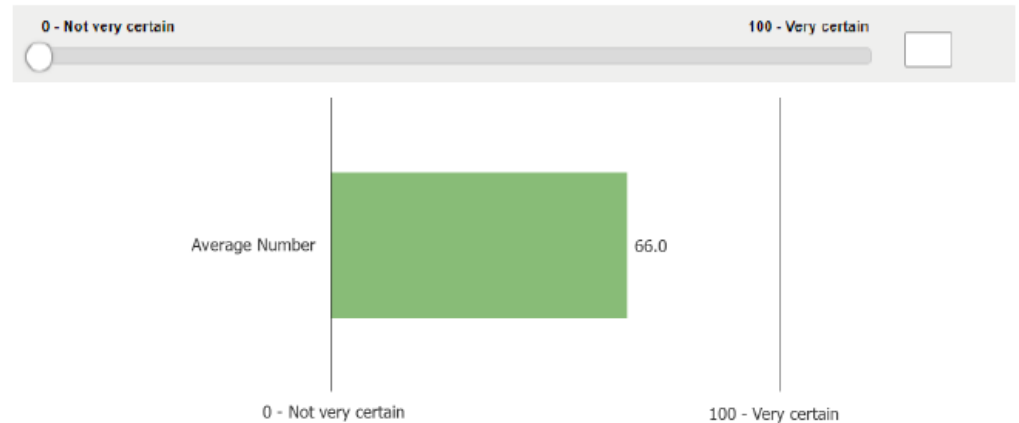


WILL YOU SUBSCRIBE TO SNAPCHAT+ SUBSCRIPTION AT THE CURRENT PRICE OF \$3.99 PER MONTH, WITHIN THE NEXT COUPLE MONTHS?

This question was posed to Snapchat users (N = 247).



Posed to those who said yes, how certain are you that you will sign up? (N = 48)



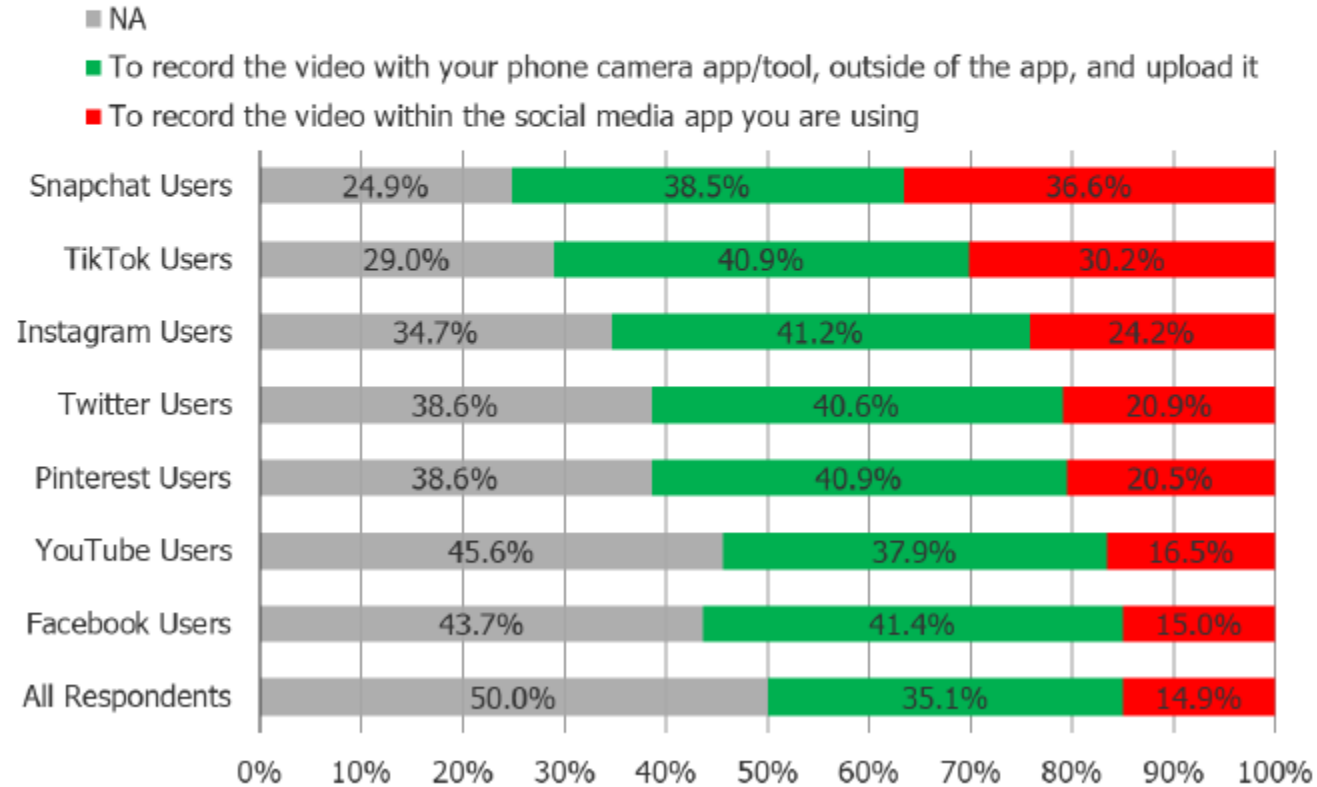
Source: Social Media Consumer Survey, US

Social Video Creation and Sharing

Snapchat and TikTok users are the most likely to create videos to upload to social media. Snapchat users are most likely to use the Snapchat camera to create the videos...

WHEN YOU CREATE VIDEOS TO UPLOAD TO SOCIAL MEDIA, WHICH DO YOU PREFER:

This question was posed to all respondents with cross-tabs showing how often users of each platform typically create videos to share (overall, not specifically on that platform).



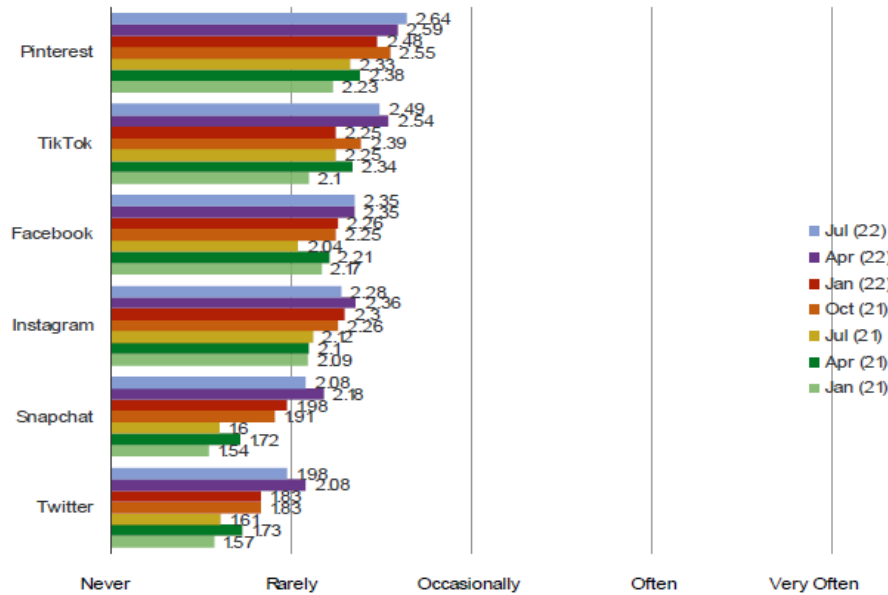
Source: Social Media Consumer Survey, US

Social Commerce

Interest in discovering/buying products within social platform experiences is increasing...

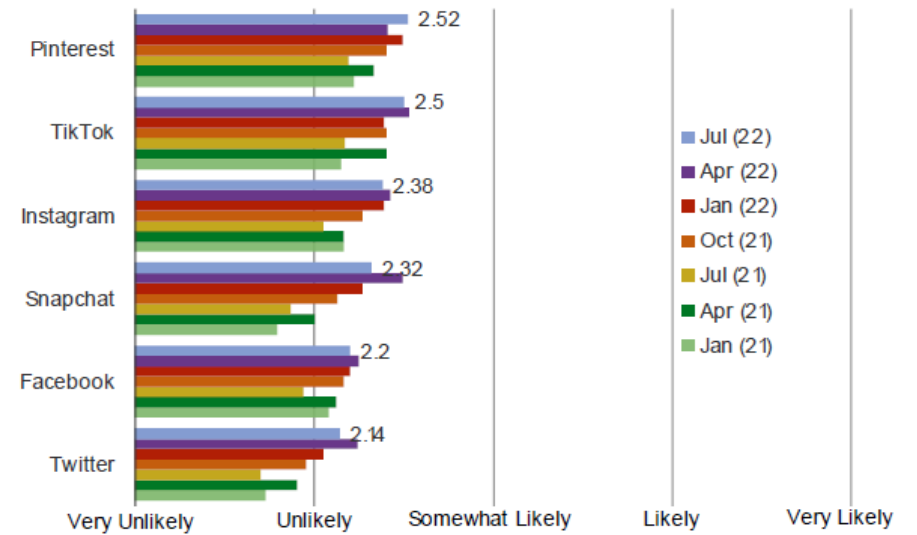
HOW OFTEN DO YOU DISCOVER PRODUCTS TO BUY ON THE FOLLOWING:

Posed to users of each of the following social media apps.



HOW LIKELY WOULD YOU BE TO BUY PRODUCTS FROM COMPANIES OR BRANDS ON SOCIAL MEDIA PLATFORMS (IE, CHECKING OUT WHILE STILL ON THE SOCIAL MEDIA PLATFORM, THROUGH THE SOCIAL MEDIA PLATFORM)

Posed to users of each of the following social media apps.



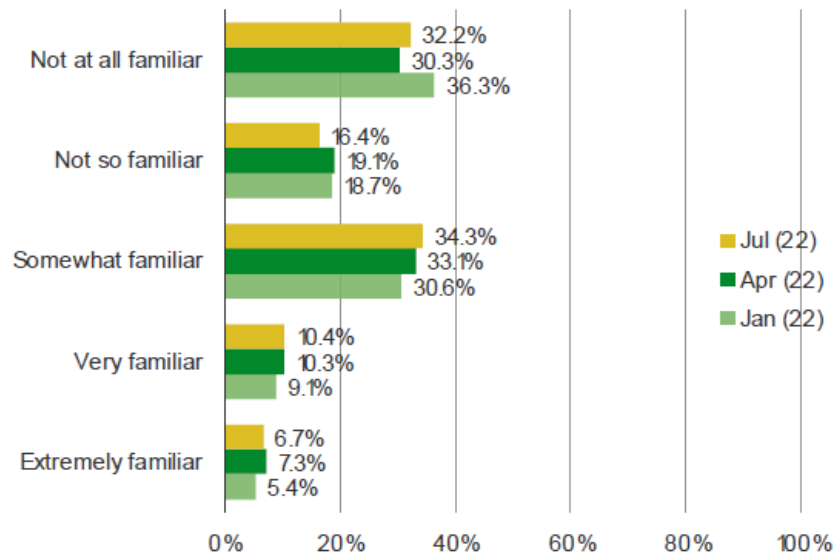
Source: Social Media Consumer Survey, US

Metaverse Interest

Consumer interest in the metaverse is still in very early innings. Most consumers associate it with “virtual reality”; some associate it with Facebook specifically...

ARE YOU FAMILIAR WITH WHAT THE METAVERSE IS?

This question was posed to all respondents.



IF YOU HAD TO BRIEFLY DESCRIBE WHAT THE METAVERSE IS TO SOMEONE, WHAT WOULD YOU SAY?

This question was posed to all respondents.



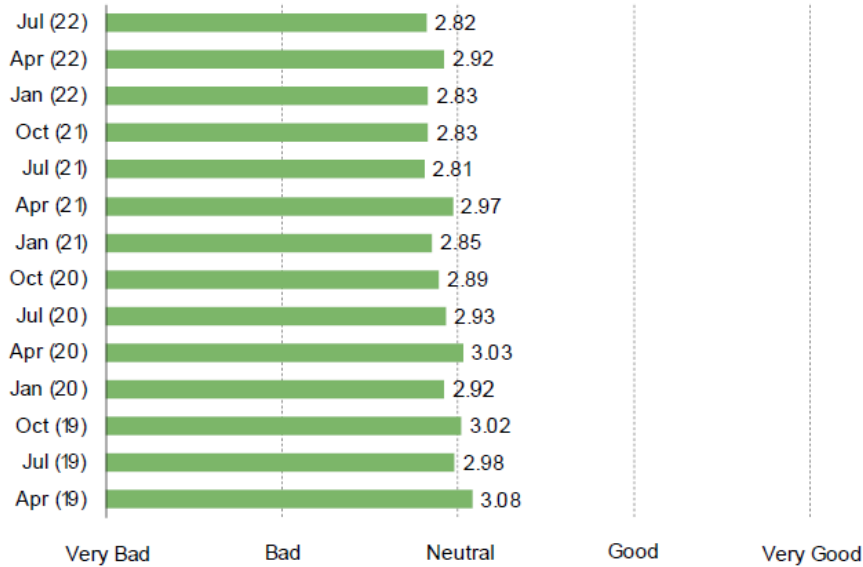
Source: Social Media Consumer Survey, US

Consumer Sentiment Toward Social Media

Consumer sentiment toward social media in general has slowly softened over time, but usage has grinded higher...

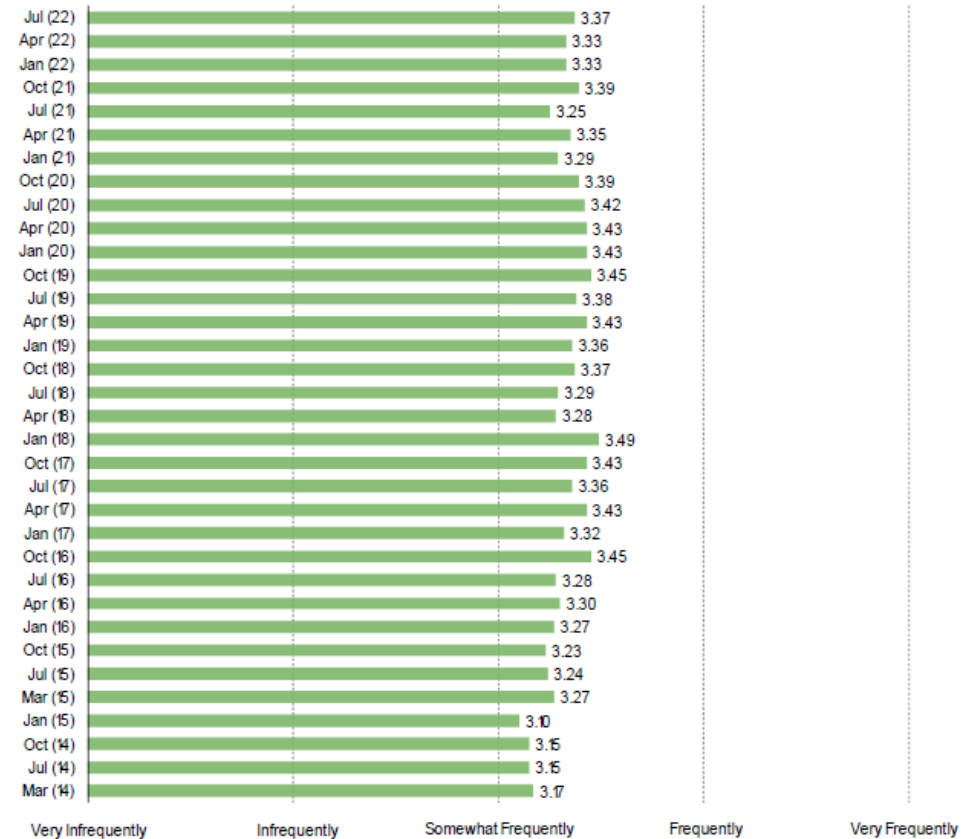
IN YOUR OPINION, IS SOCIAL MEDIA IN GENERAL A GOOD THING OR A BAD THING?

Posed to all respondents



SOCIAL MEDIA USAGE FREQUENCY

Posed to all consumers.



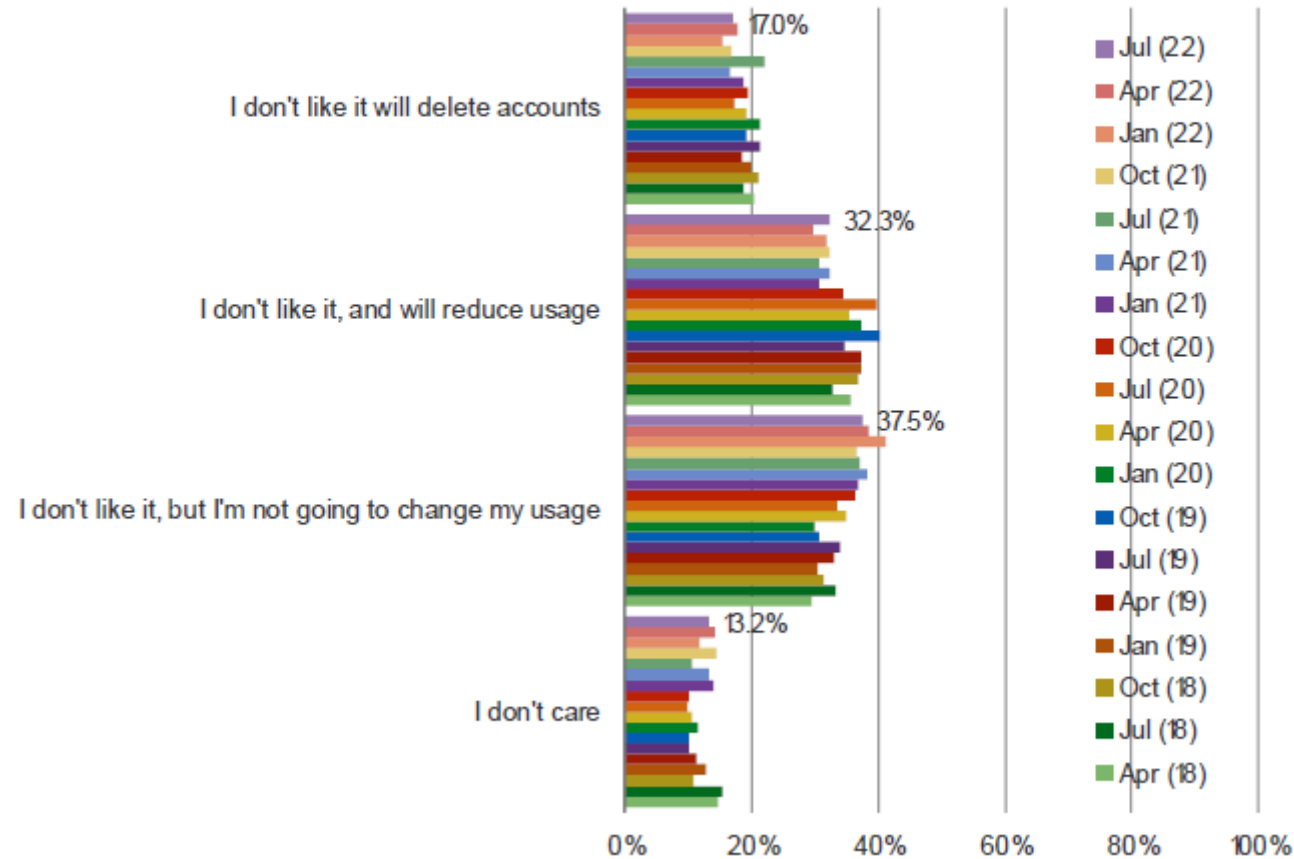
Source: Social Media Consumer Survey, US

Social Media and Privacy | Opinions Overall

Consumers don't love social media sites collecting personal data, but their acceptance of the practice has grown over time...

WHAT IS YOUR OPINION OF SOCIAL MEDIA SITES COLLECTING PERSONAL DATA WHEN YOU USE THEM?

Posed to all respondents about social media in general



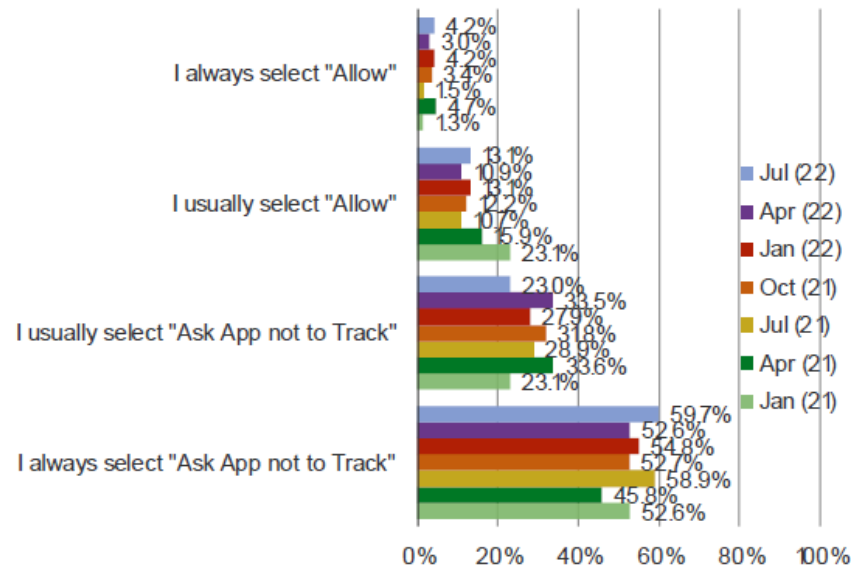
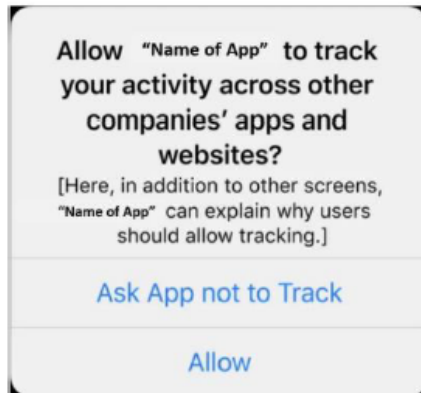
Source: Social Media Consumer Survey, US

Social Media and Privacy | Opt-Outs

But when prompted, they are very likely (and increasingly likely) to opt-out...

WHEN YOU HAVE GOTTEN THESE NOTIFICATIONS, WHAT DO YOU SELECT?

Posed to iPhone owners who have seen notifications like the below.



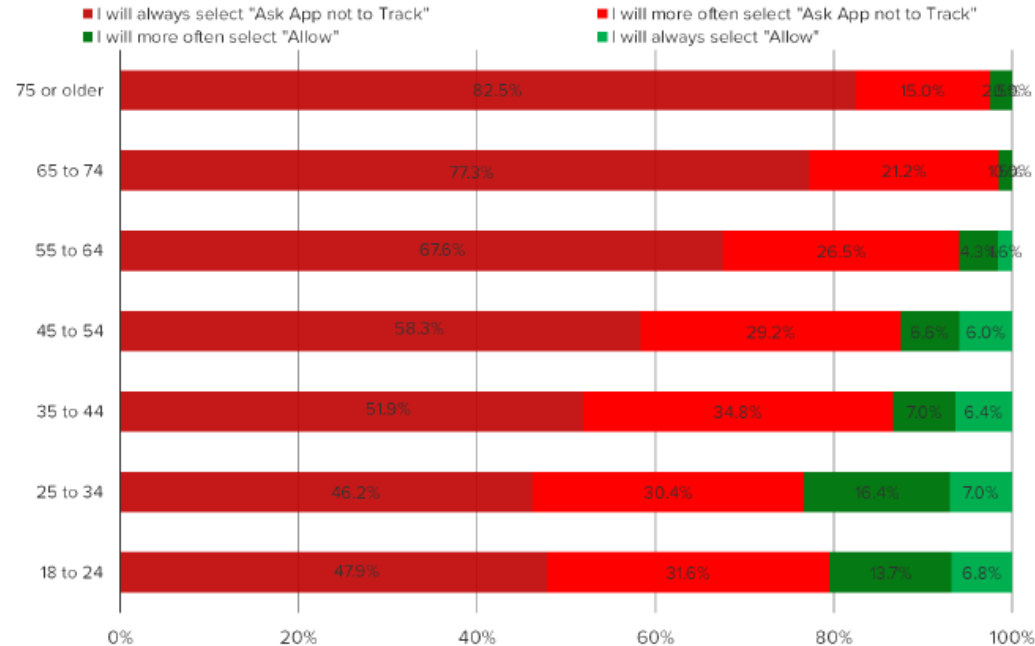
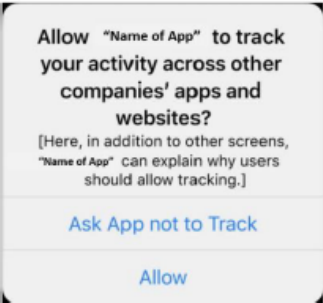
Source: Social Media Consumer Survey, US

Social Media and Privacy | By Age

Younger users are less likely to opt-out...

GOING FORWARD, IF YOU SEE THIS NOTIFICATION FOR APPS YOU USE, WHAT WILL YOU CHOOSE?

Posed to all respondents, cross-tabbed by age.



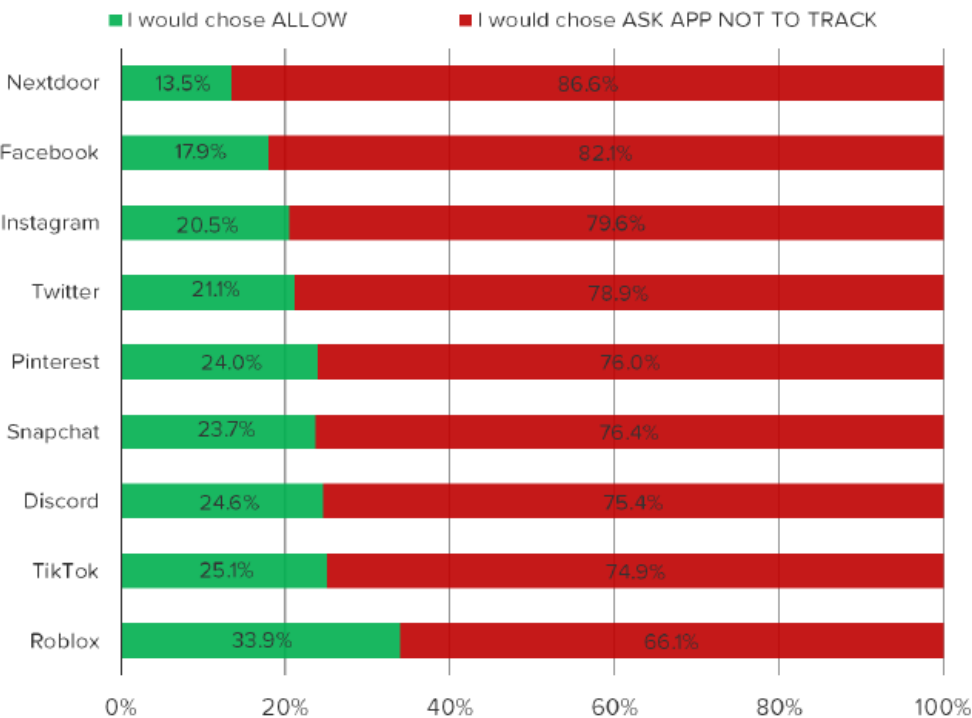
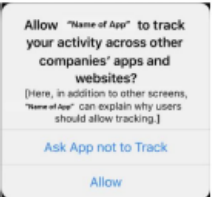
Source: Social Media Consumer Survey, US

Social Media and Privacy | By Platform

Which is likely why platforms like Roblox, TikTok, Discord, and Snapchat are less likely to see opt-outs...

IF YOU GOT THE ABOVE PICTURED NOTIFICATION FOR THE FOLLOWING TODAY, WHAT WOULD YOU CHOOSE?

Posed to iOS users who use of each of the following.



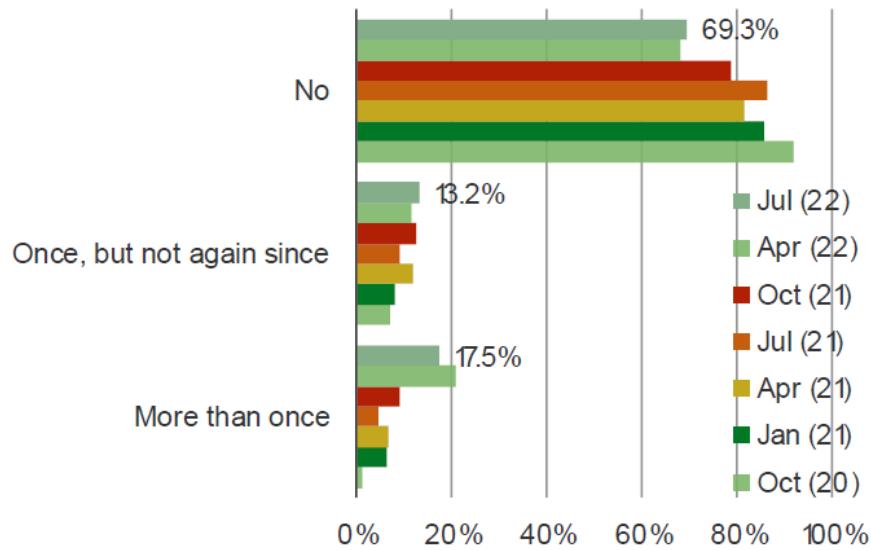
Source: Social Media Consumer Survey, US

Instagram Reels

Feedback toward Reels has improved sequentially...

HAVE YOU CREATED ANY INSTAGRAM REELS YET?

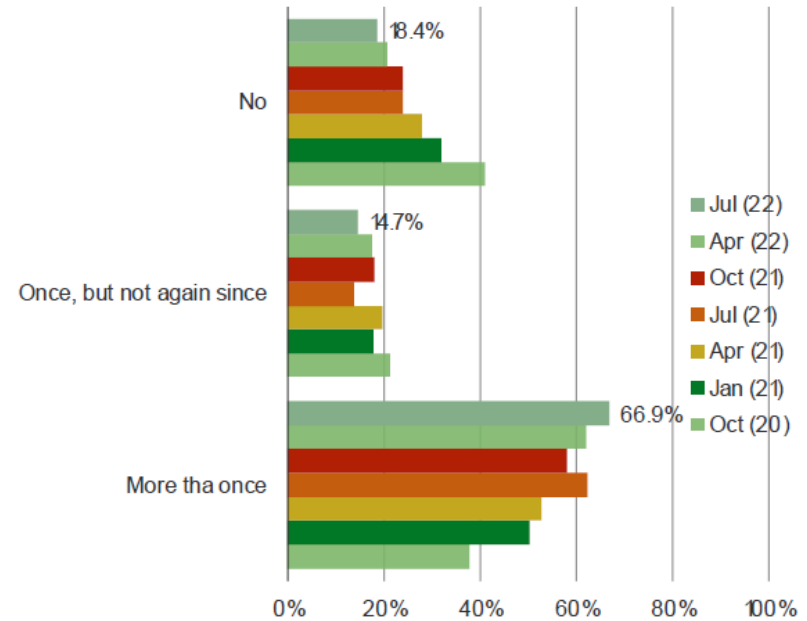
Posted to Instagram Users who have heard of Reels:



*Note: We did not ask this question in our January 2022 survey.

HAVE YOU WATCHED/SEEN ANY INSTAGRAM REELS VIDEOS YET?

Posted to Instagram Users who have heard of Reels:



*Note: We did not ask this question in our January 2022 survey.

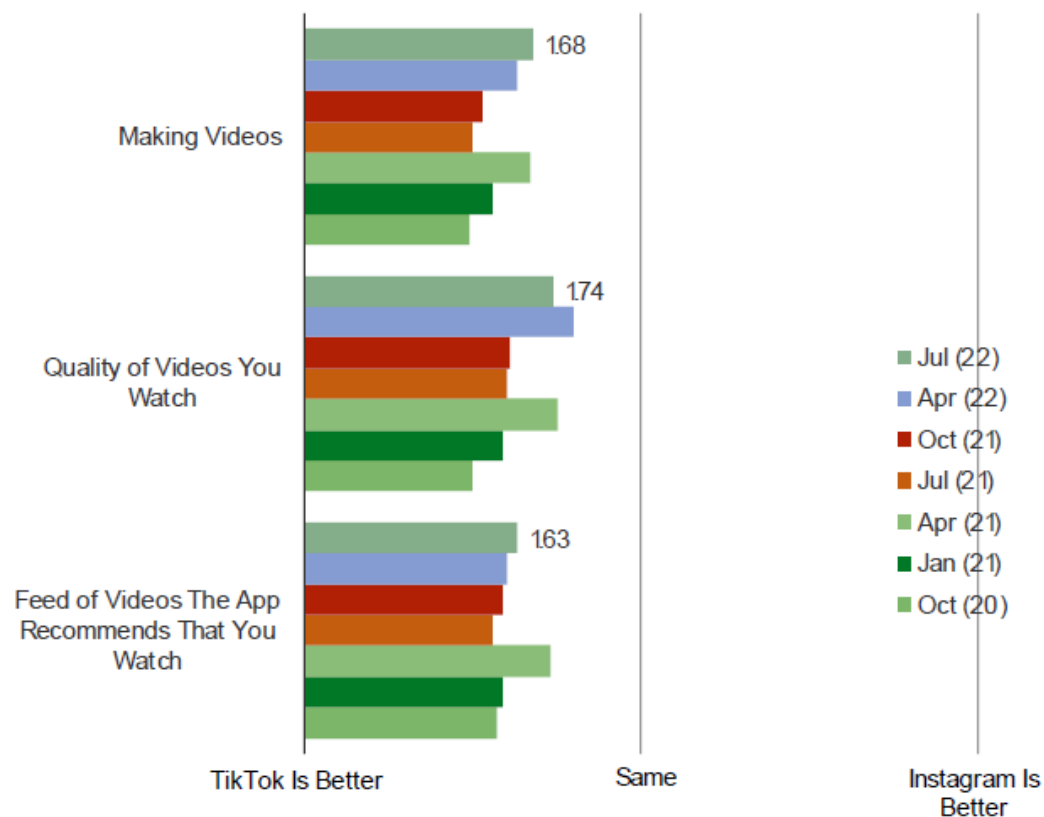
Source: Social Media Consumer Survey, US

Instagram Reels vs. TikTok

Sentiment toward Reels has also improved in relative comparisons to TikTok...

HOW DOES INSTAGRAM REELS COMPARE TO TIKTOK WHEN IT COMES TO THE FOLLOWING:

Posted to Instagram Users who have heard of Reels AND use TikTok:



*Note: We did not ask this question in our January 2022 survey.

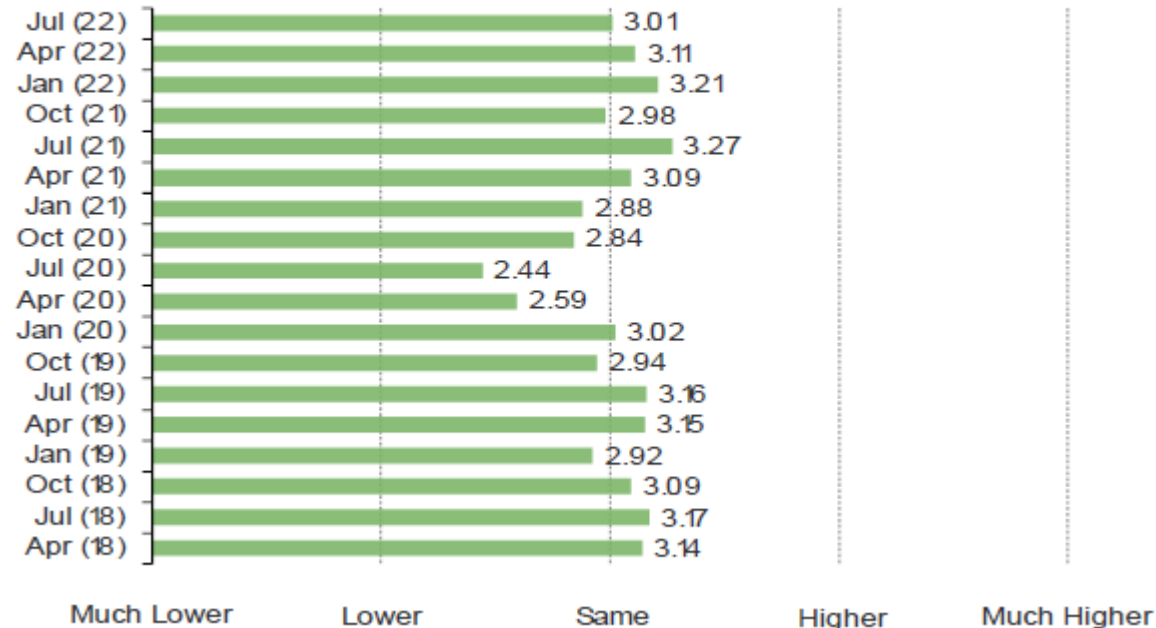
Source: Social Media Consumer Survey, US

Advertising Budgets

Feedback toward client ad-budgets has whipsawed in different directions since the start of the pandemic...

PLEASE DESCRIBE YOUR CLIENT'S ADVERTISING BUDGETS OVERALL COMPARED TO LAST QUARTER.

This question was posed to the target audience.



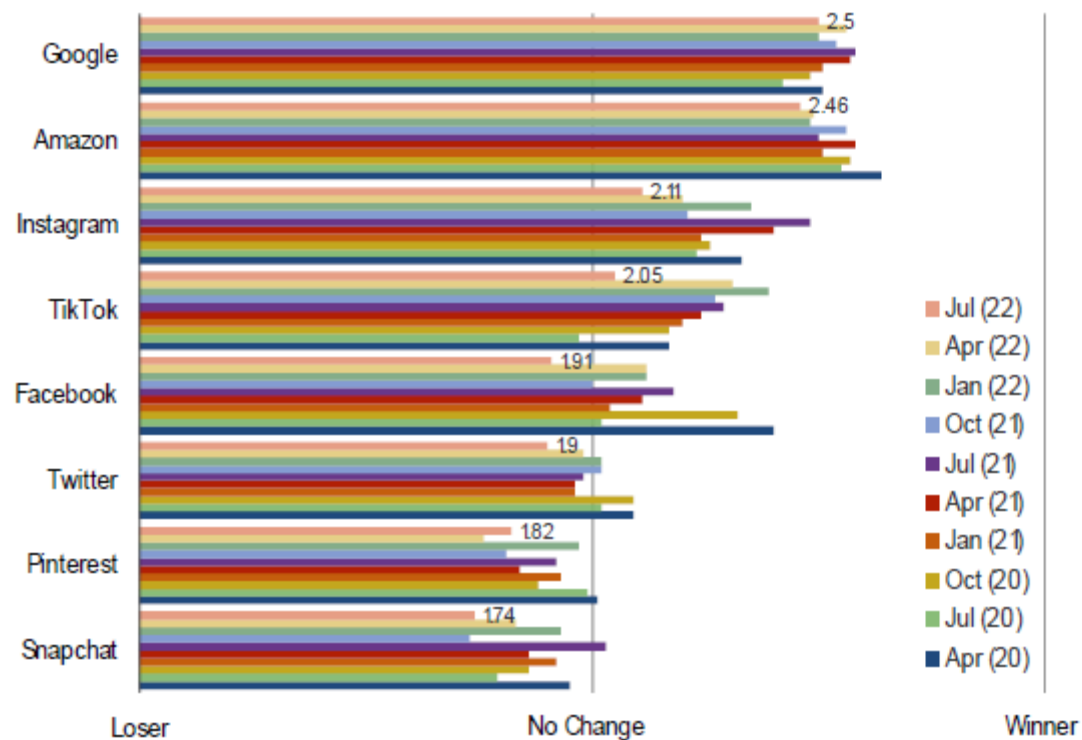
Source: Social Media Ad Execs Survey, US

Advertising Winners and Losers

Ad execs see Google and Amazon as the most likely to be share winners in the next 3-6 months...

IN THE NEXT 3-6 MONTHS, DO YOU EXPECT THE FOLLOWING TO BE A MARKET SHARE WINNER OR LOSER?

This question was posed to the target audience.



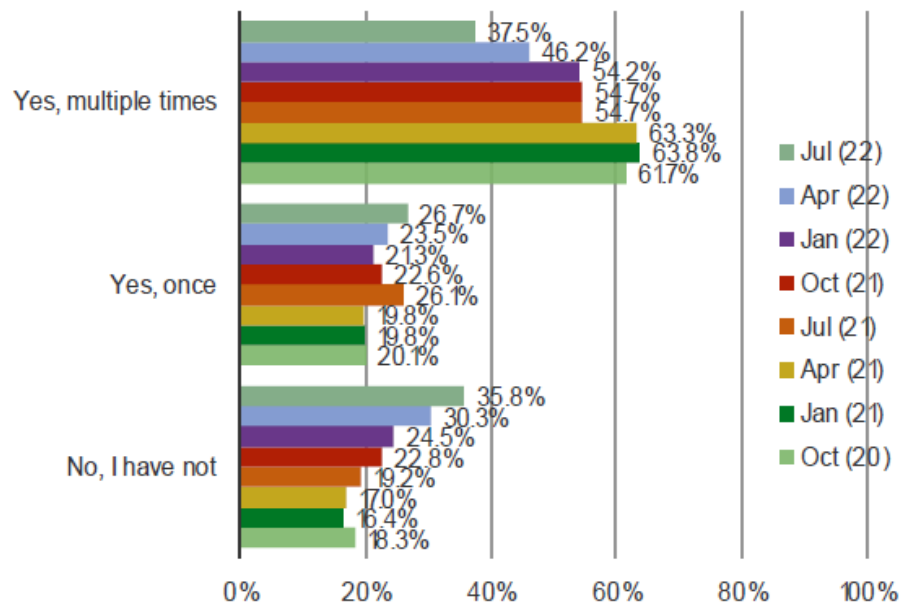
Source: Social Media Ad Execs Survey, US

Masks

Mask purchases and look forward projects on mask wearing are in decline...

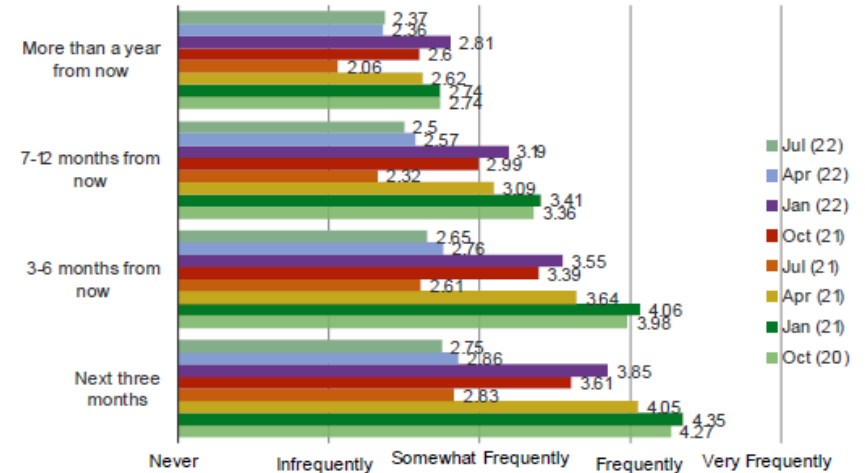
HAVE YOU PURCHASED MASK(S) THIS YEAR?

Posed to all respondents



HOW OFTEN DO YOU EXPECT TO WEAR A MASK DURING THE FOLLOWING PERIODS?

Posed to all respondents



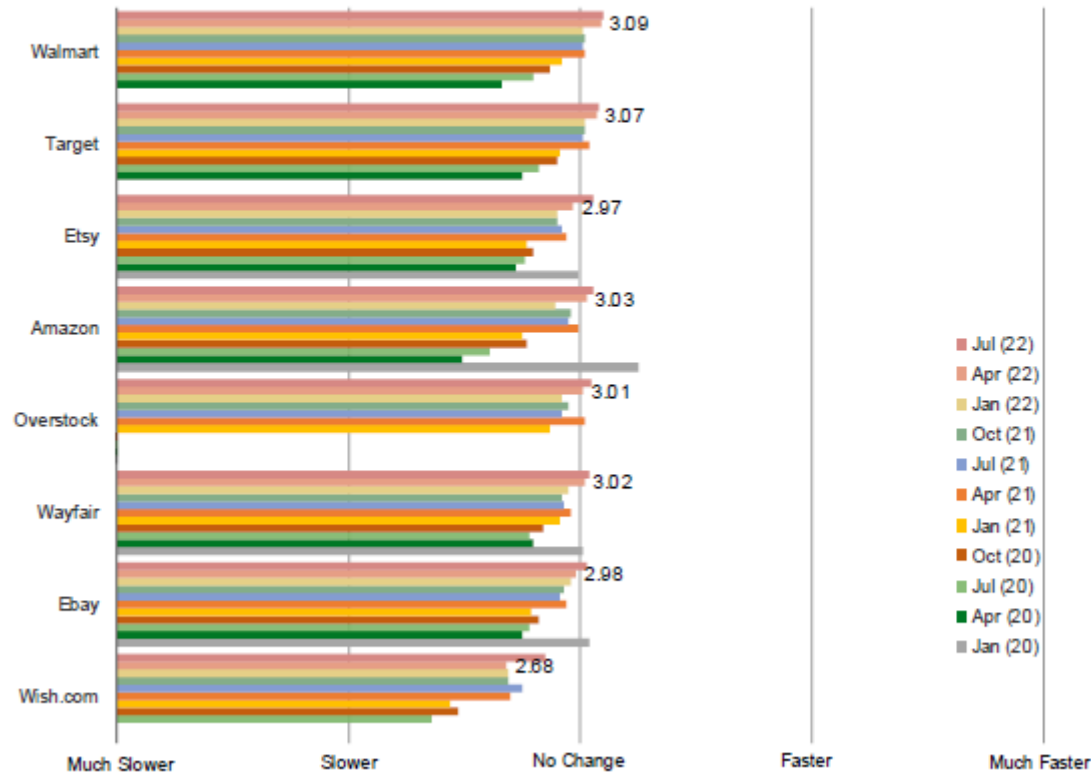
Source: Online Retailers Survey, US

eCommerce Shipping

Issues with slow shipping are being worked out...

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

Posed to users of each site/app.



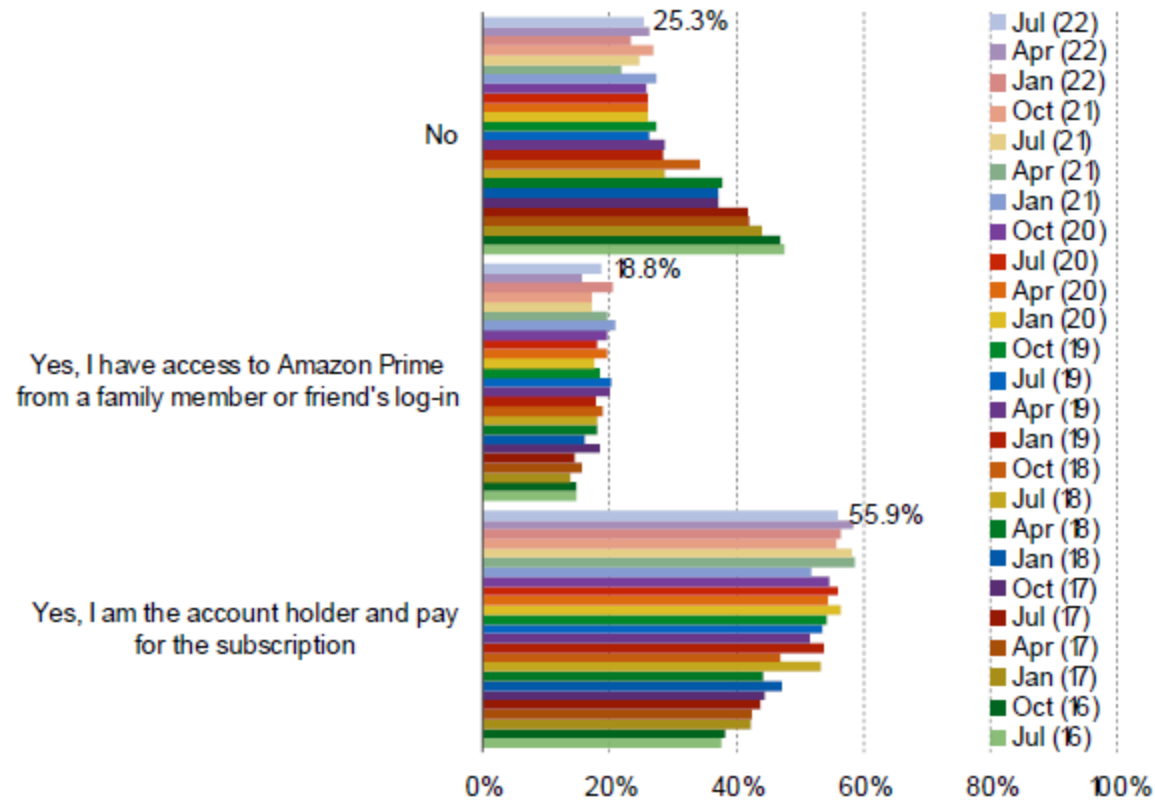
Source: Online Retailers Survey, US

Amazon Prime

Prime memberships have grinded higher sequentially over time...

ARE YOU CURRENTLY A SUBSCRIBER TO AMAZON PRIME?

Posed to Amazon users



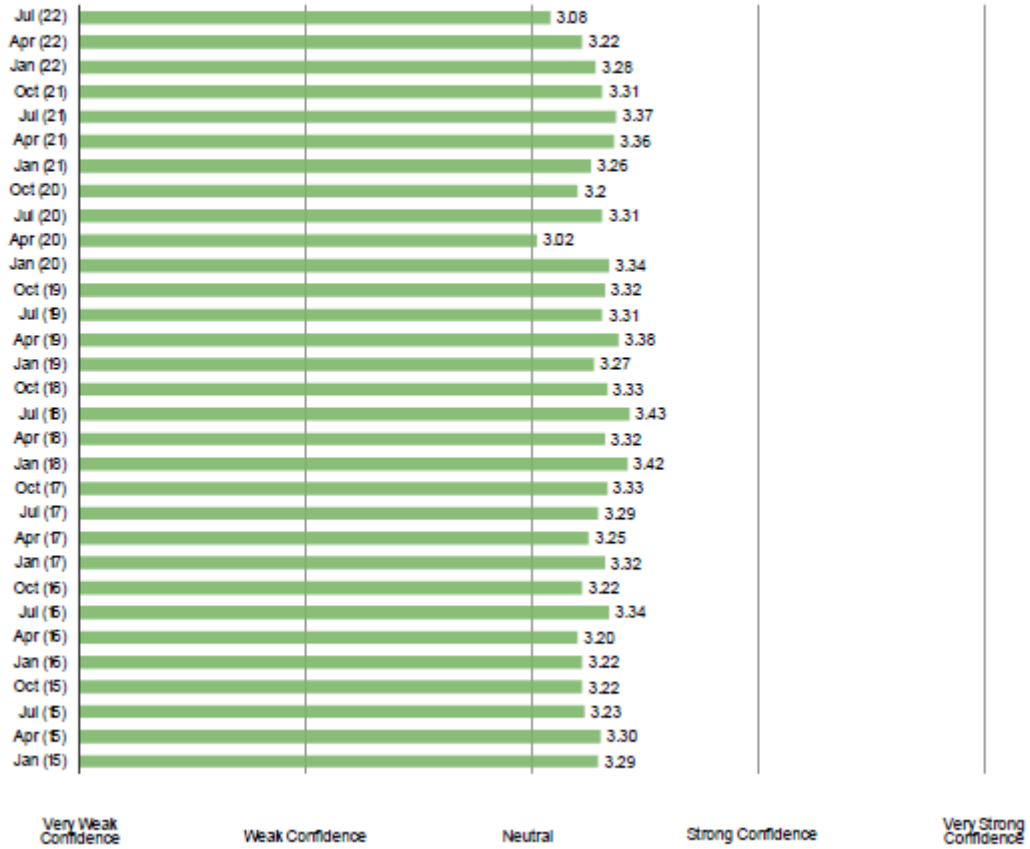
Source: Online Retailers Survey, US

Spending Confidence

Consumer confidence in spending money has declined off a recent high set in July 2021...

HOW CONFIDENT DO YOU CURRENTLY FEEL TO SPEND MONEY?

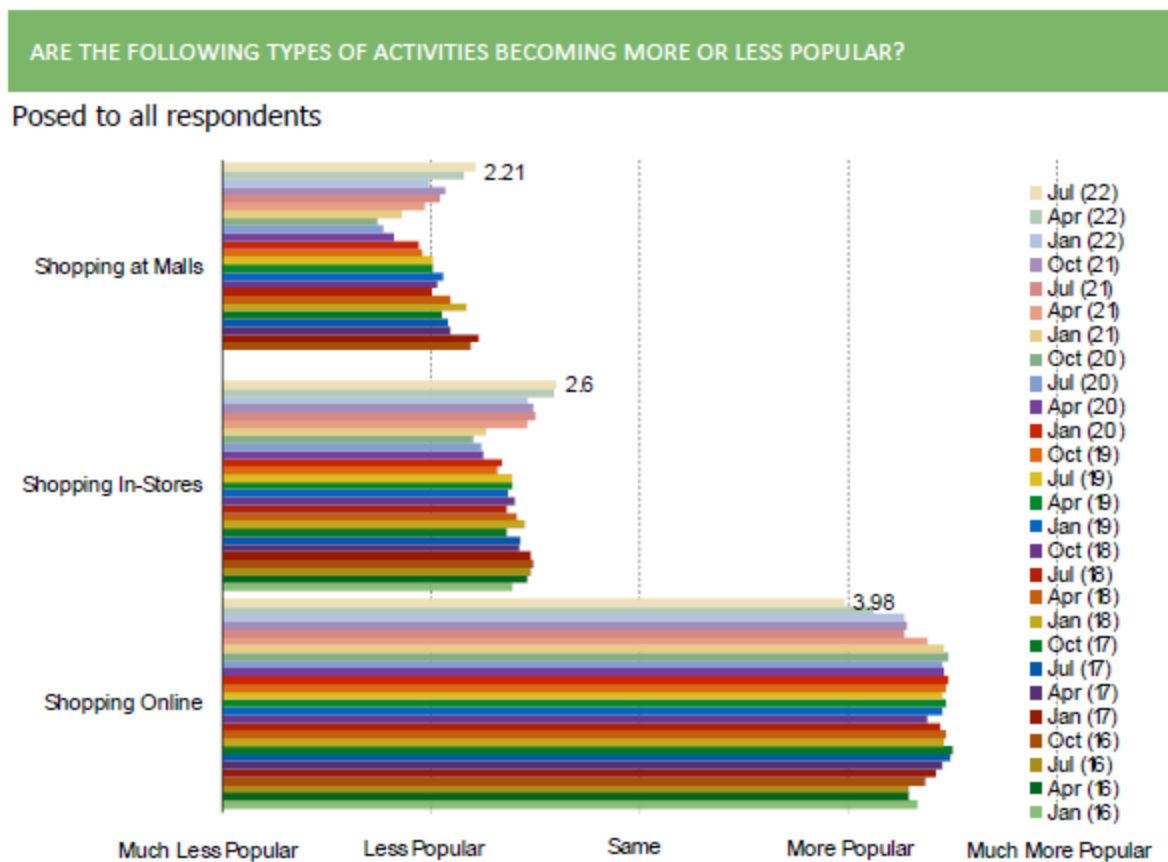
Posed to all respondents



Source: Online Retailers Survey, US

Shopping | Online vs. In-Store

Online is firmly viewed as a consistent popularity gainer, at the expense of in-store and at malls. However, the data has improved for in-stores as we emerge from the pandemic...



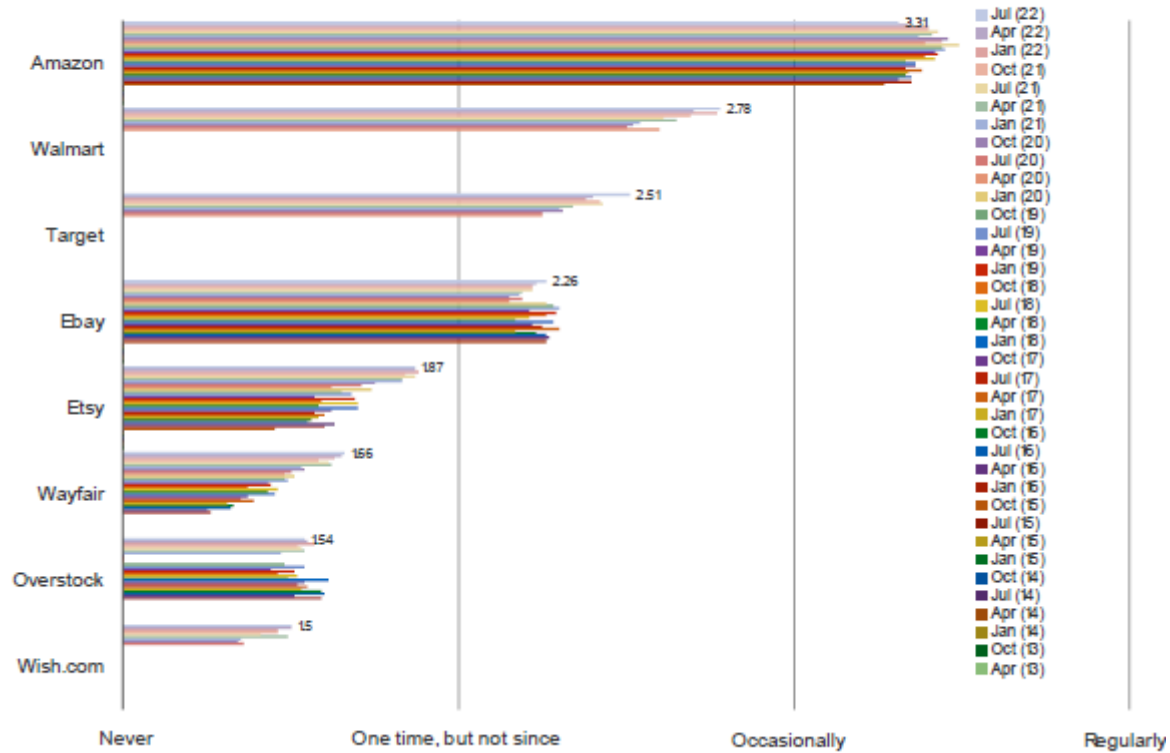
Source: Online Retailers Survey, US

eCommerce Customer Acquisition By Platform

Etsy and Wayfair have been growing into their TAM over the history of our survey...

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

Posed to all respondents



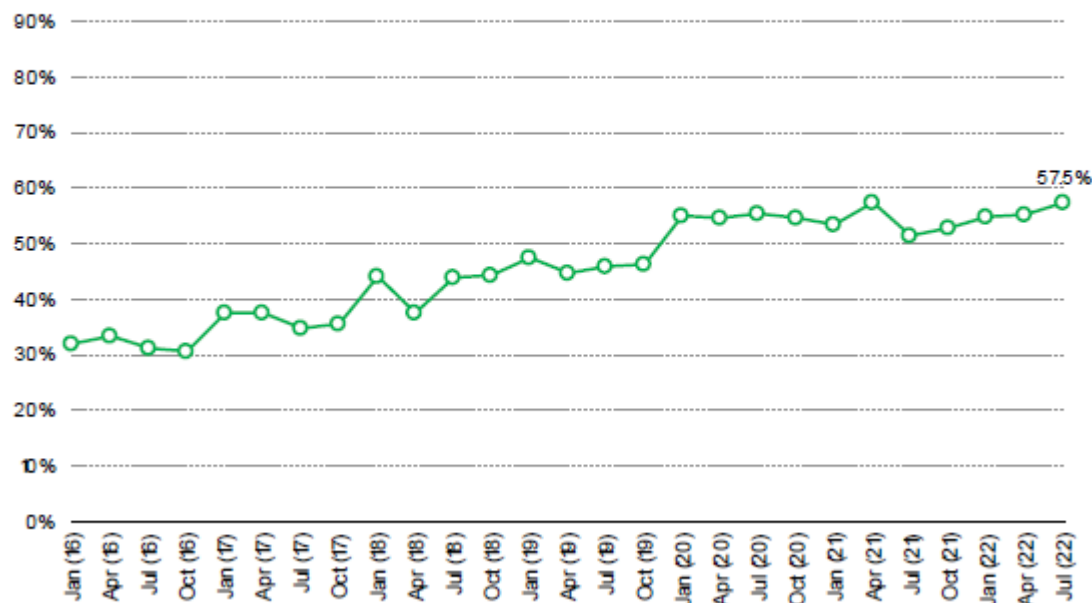
Source: Online Retailers Survey, US

Amazon Mobile Participation

Amazon users are growing more likely to buy items through the app...

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

Posed to Amazon users

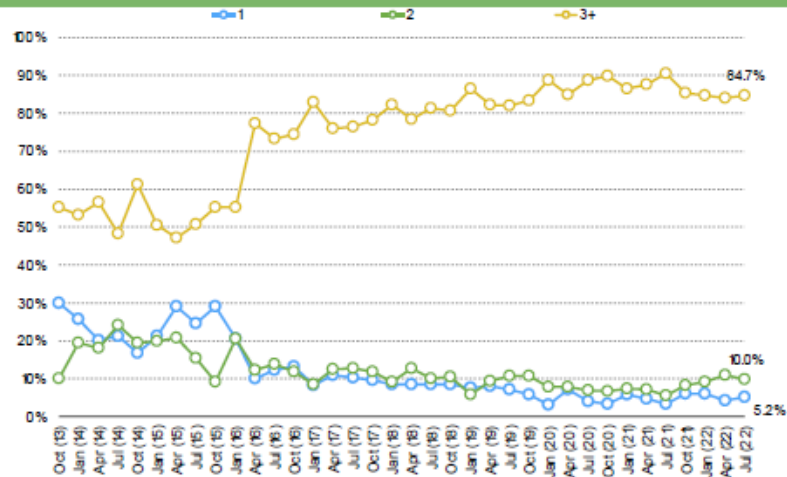


Source: Online Retailers Survey, US

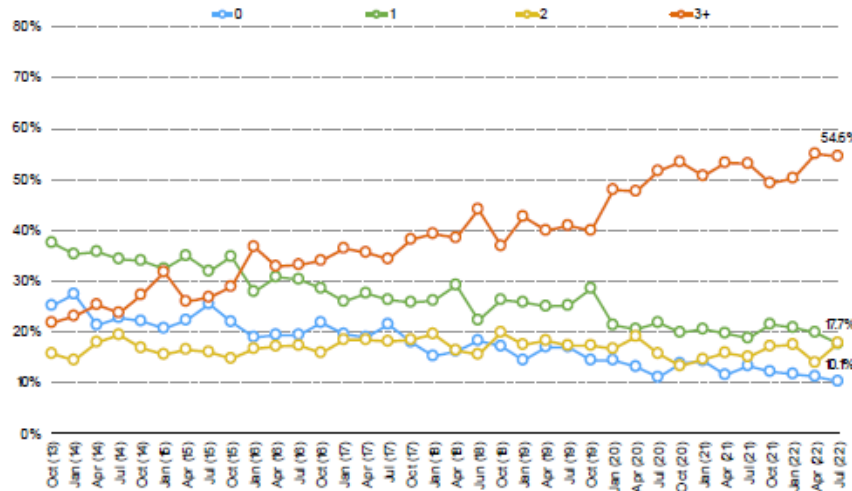
Amazon Monthly Purchases

Items purchased per month are quite strong for Amazon and have improved over the history of our survey. But it is getting to a point where there isn't much room to improve upon the latest survey results...

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



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

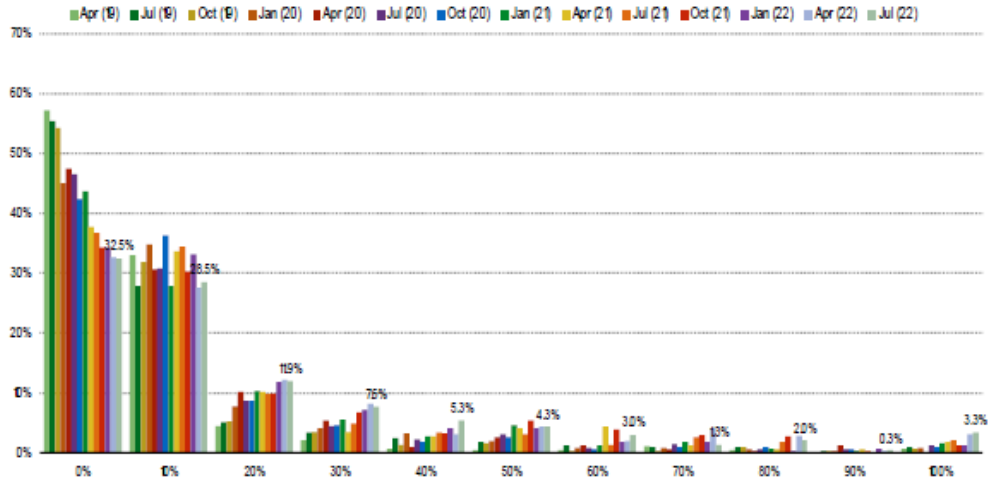


Source: Online Retailers Survey, US

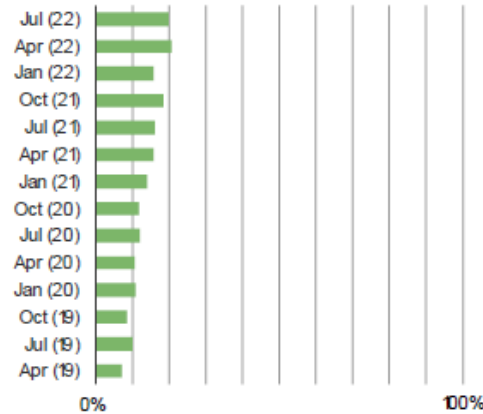
Wayfair Loyalty

Wayfair is slowly gobbling up a larger portion of customer furniture purchases...

WAYFAIR USERS – WHAT PERCENTAGE OF YOUR TOTAL FURNITURE AND HOME FURNISHINGS PURCHASES DO YOU MAKE THROUGH WAYFAIR?



Weighted Average of Chart Above:



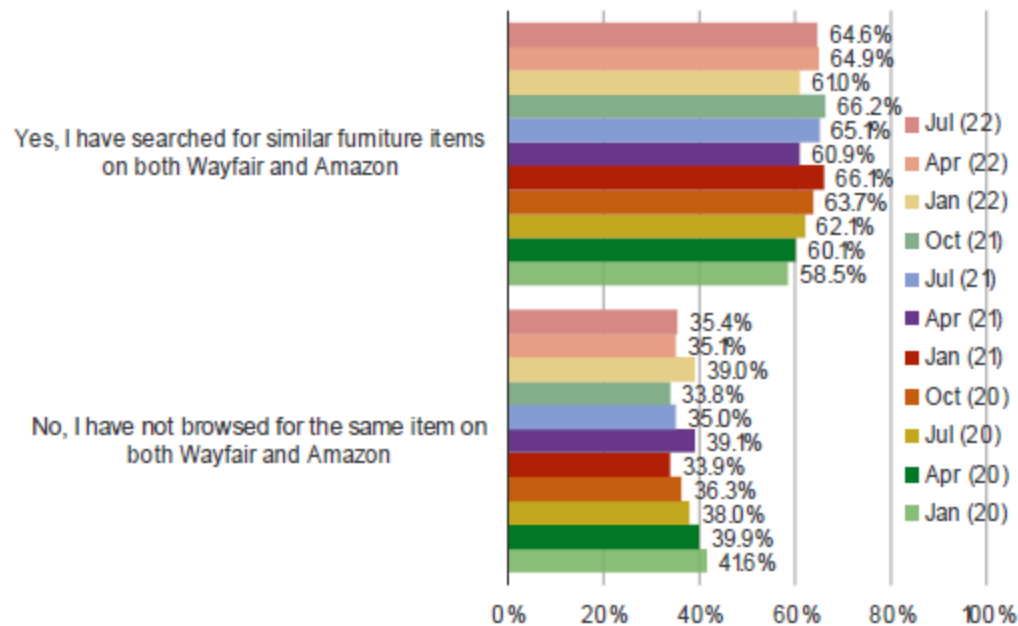
Source: Online Retailers Survey, US

Wayfair and Amazon Cross-Shopping

Most Wayfair users cross-shop Amazon...

HAVE YOU EVER BROWSED FOR THE SAME TYPE OF FURNITURE PRODUCT ON BOTH WAYFAIR AND AMAZON?

Posed to Wayfair users.

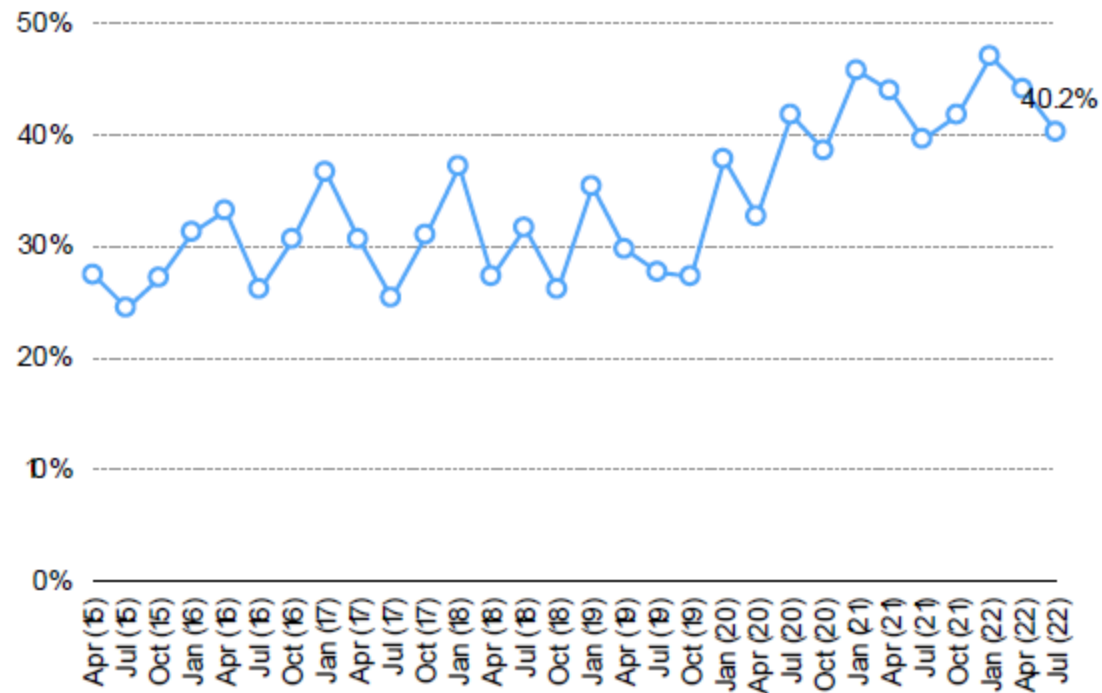


Source: Online Retailers Survey, US

Etsy Shopping

Etsy users have become more active over time, albeit with some volatility...

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

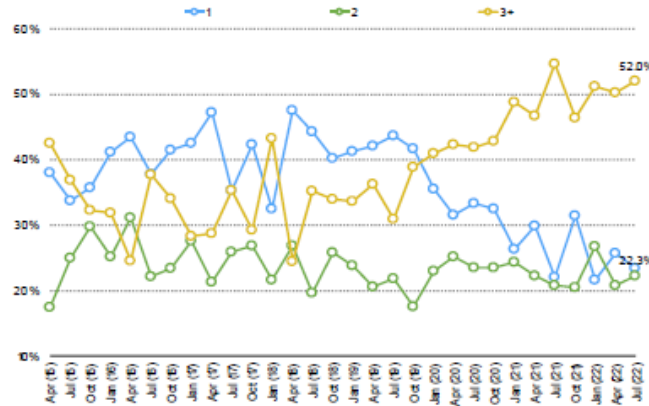


Source: Online Retailers Survey, US

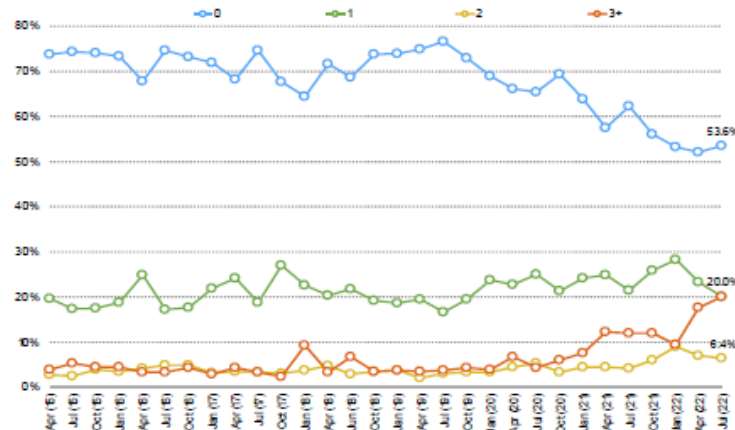
Etsy Shopping Items Per Month

Those who are buying from Etsy are buying more items per month...

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



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



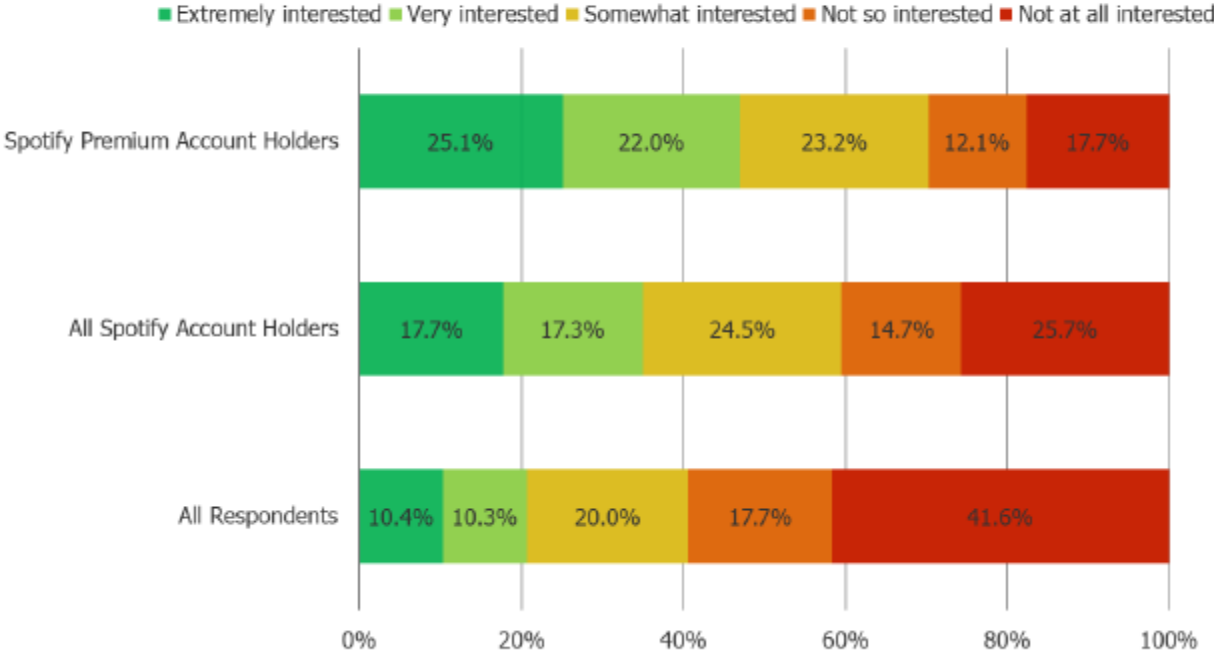
Source: Online Retailers Survey, US

Spotify and Audiobooks

Spotify users would be interested in audiobooks...

PLEASE EVALUATE YOUR INTEREST LEVEL IN BEING ABLE TO LISTEN AUDIOBOOKS ON SPOTIFY?

Posed to all respondents, cross-tabbed with filters.



Source: Audio Survey, US

Audiobooks Mindshare

Audiobooks is a far less crowded field compared to music and podcasts...

WHAT IS THE FIRST PLATFORM THAT COMES TO MIND FOR LISTENING TO THE FOLLOWING?

Posed to respondents who listen to each of the following at least somewhat frequently.

MUSIC



PODCASTS



AUDIOBOOKS



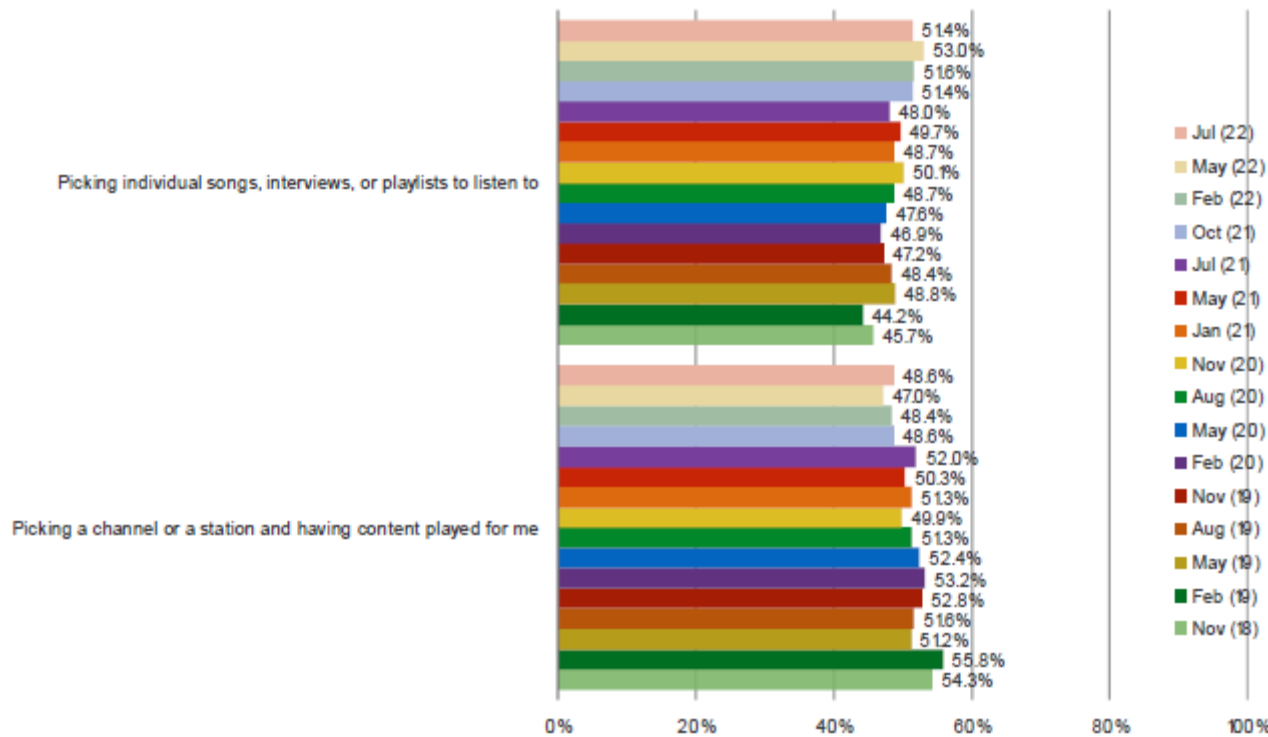
Source: Audio Survey, US

Audio Preferences

Consumer preferences are shifting from channels or stations to picking individual songs, interviews, or playlists to listen to...

FOR LISTENING TO MUSIC AND TALK-SHOW CONTENT, WHICH IS BETTER?

Posed to all respondents.



Source: Audio Survey, US

Podcasts

Joe Rogan dominates podcast mindshare...

WHAT ARE YOUR FAVORITE PODCASTS TO LISTEN TO AT THE MOMENT?

Posed to all respondents.



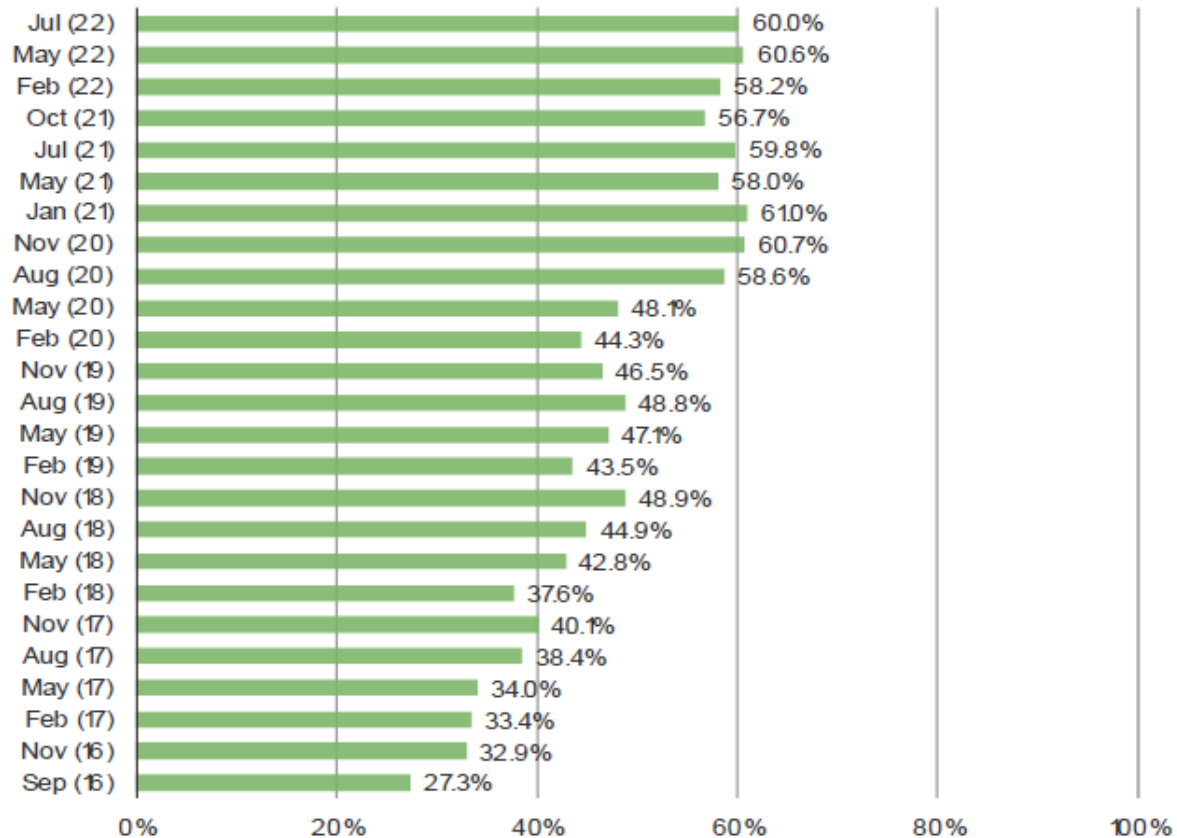
Source: Audio Survey, US

Connected Car and Audio

Though flatter of late, consumers have dramatically increased their usage of their phone connecting to the car for audio listening...

DO YOU EVER CONNECT A SMARTPHONE TO LISTEN TO MUSIC APPS IN YOUR CAR LIKE SPOTIFY, PANDORA, APPLE MUSIC, ETC?

Posed to all respondents who own / lease a car



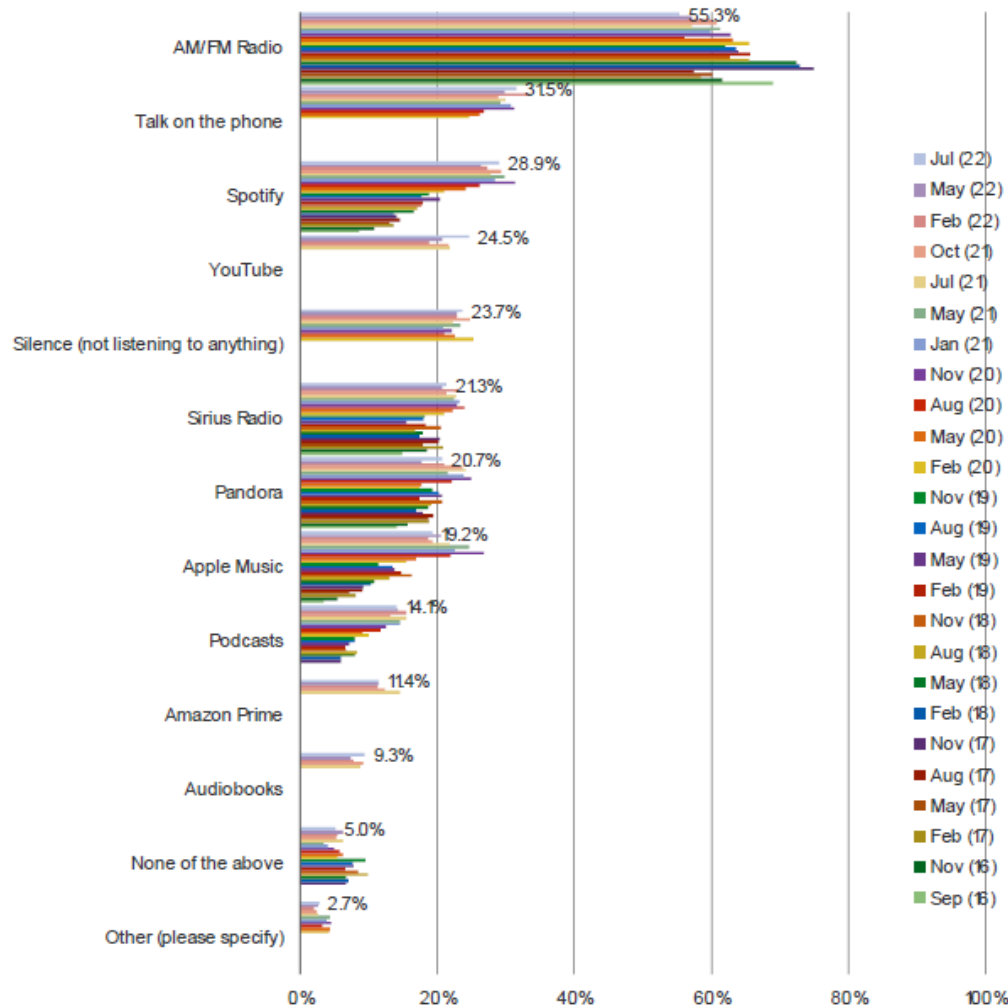
Source: Audio Survey, US

Connected Car vs. AM/FM

AM/FM Radio has been losing ground to alternatives in the car for some time now...

DO YOU REGULARLY OR OCCASIONALLY LISTEN TO THE FOLLOWING IN YOUR CAR? (SELECT ALL THAT APPLY)

Posed to all respondents who own / lease a car



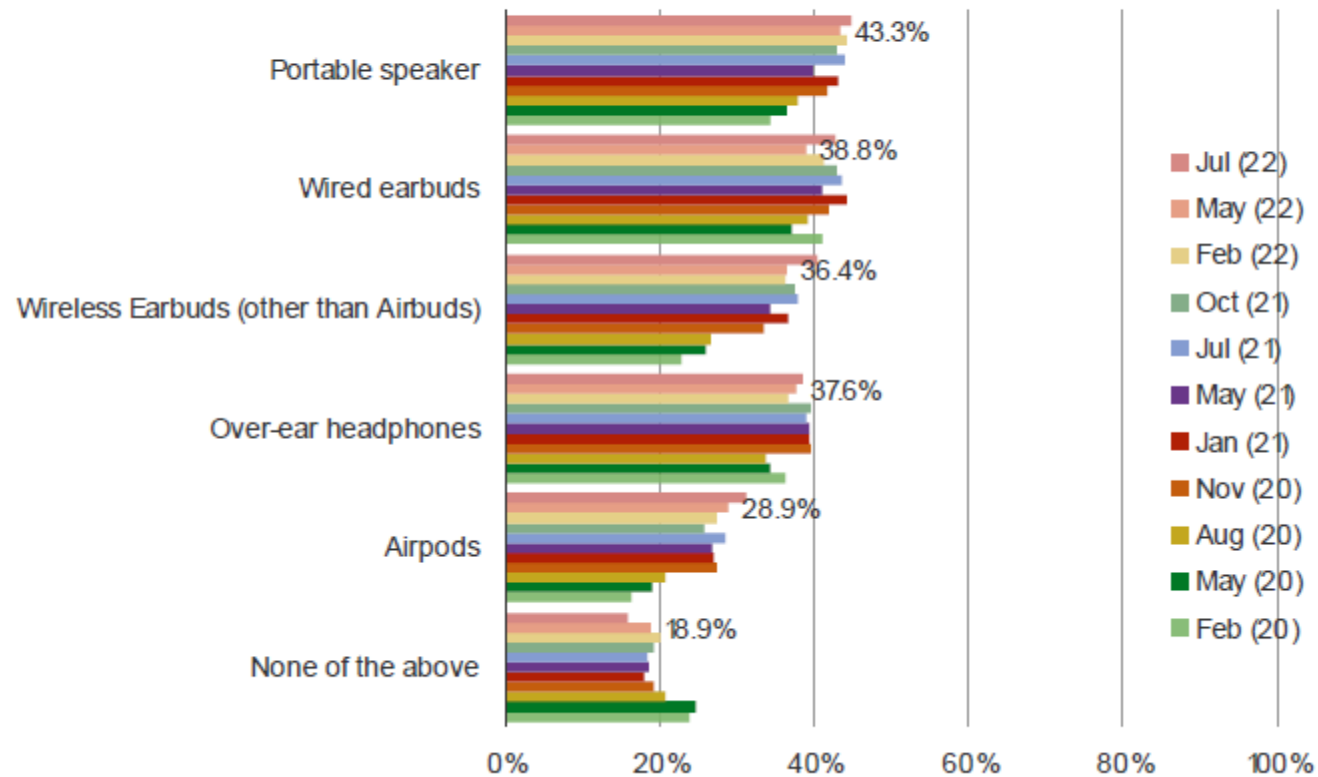
Source: Audio Survey, US

Audio Hardware

Portable speakers and Airpods/Earbuds have grown in popularity...

DO YOU OWN ANY OF THE FOLLOWING?

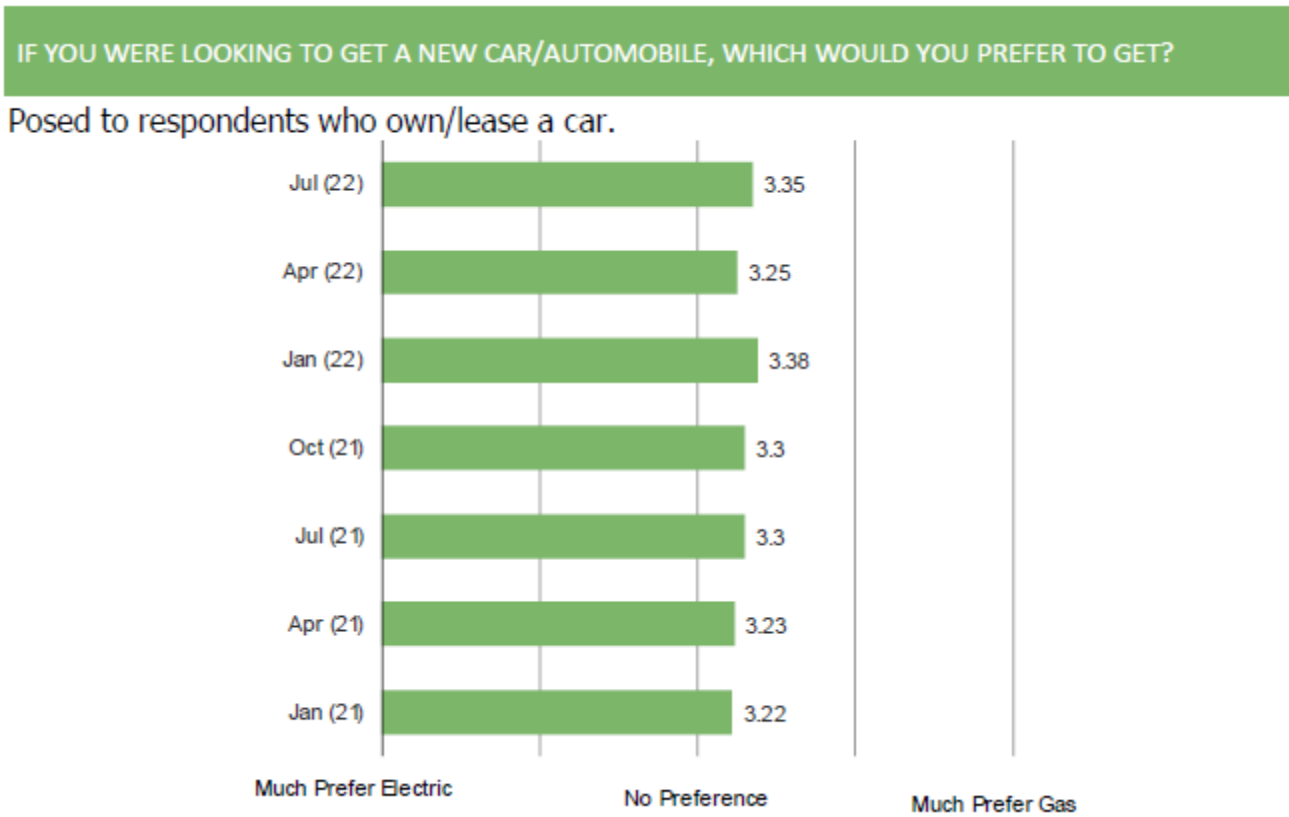
Posed to all respondents



Source: Audio Survey, US

EV vs. Gas Preference

Consumers prefer gas and the data has remained mostly unchanged over time...



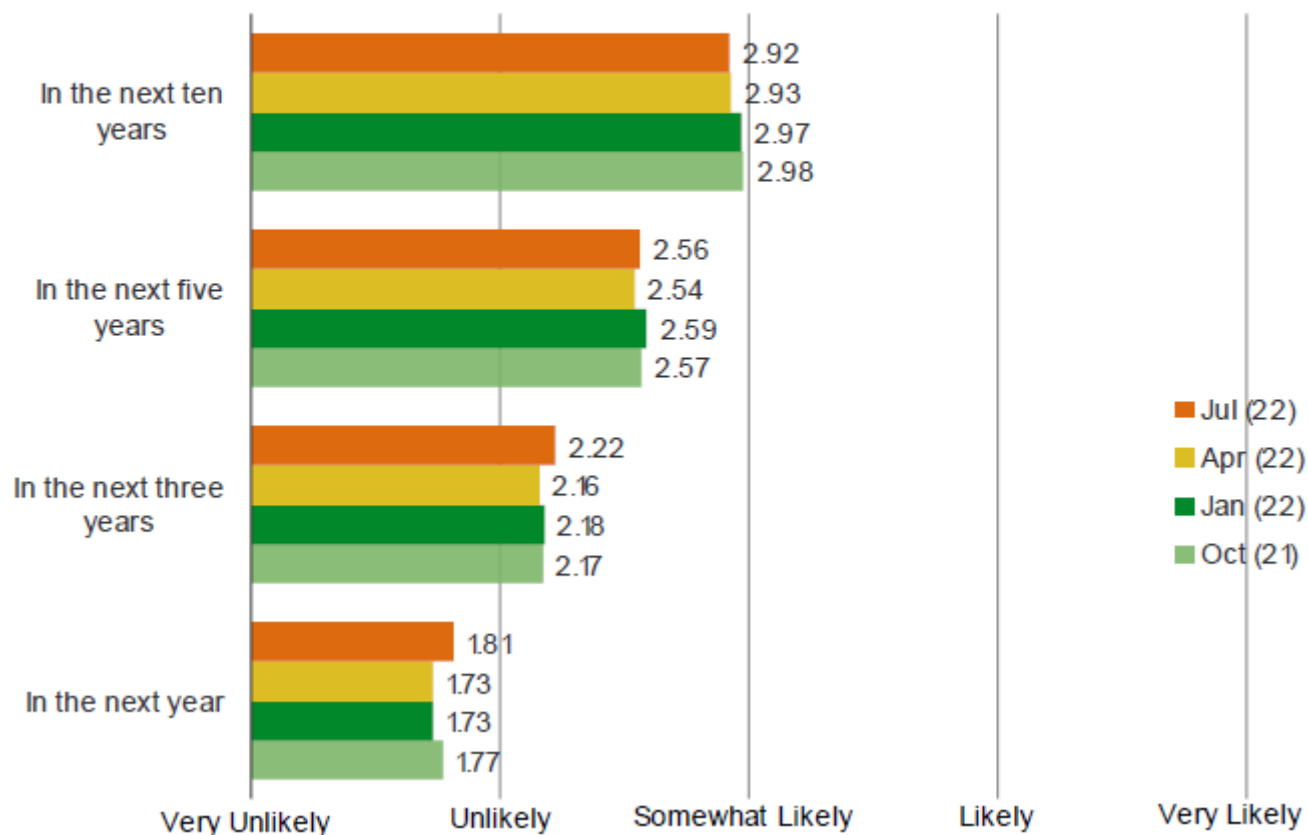
Source: EVs and Autos Survey, US

EVs Expectations

Consumers do think the EV wave is coming, though...

HOW LIKELY ARE YOU OWN OR LEASE AN ELECTRIC VEHICLE...

Posed to respondents who own/lease a car.



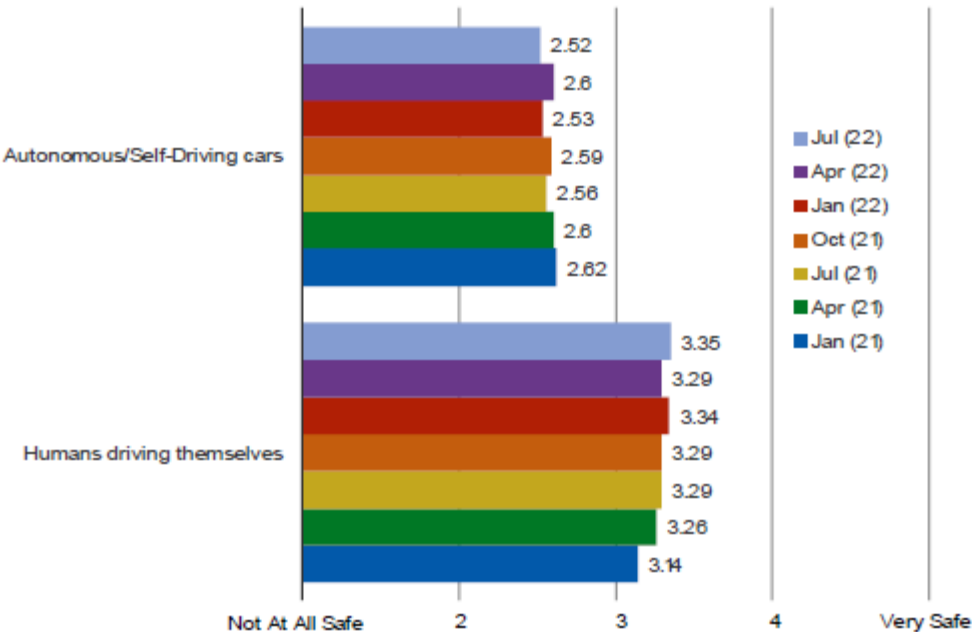
Source: EVs and Autos Survey, US

Self-Driving Cars

Consumers are not yet sold on the safety of self-driving cars...

HOW WOULD YOU RATE HOW SAFE THE FOLLOWING ARE?

Posed to respondents who own/lease a car.



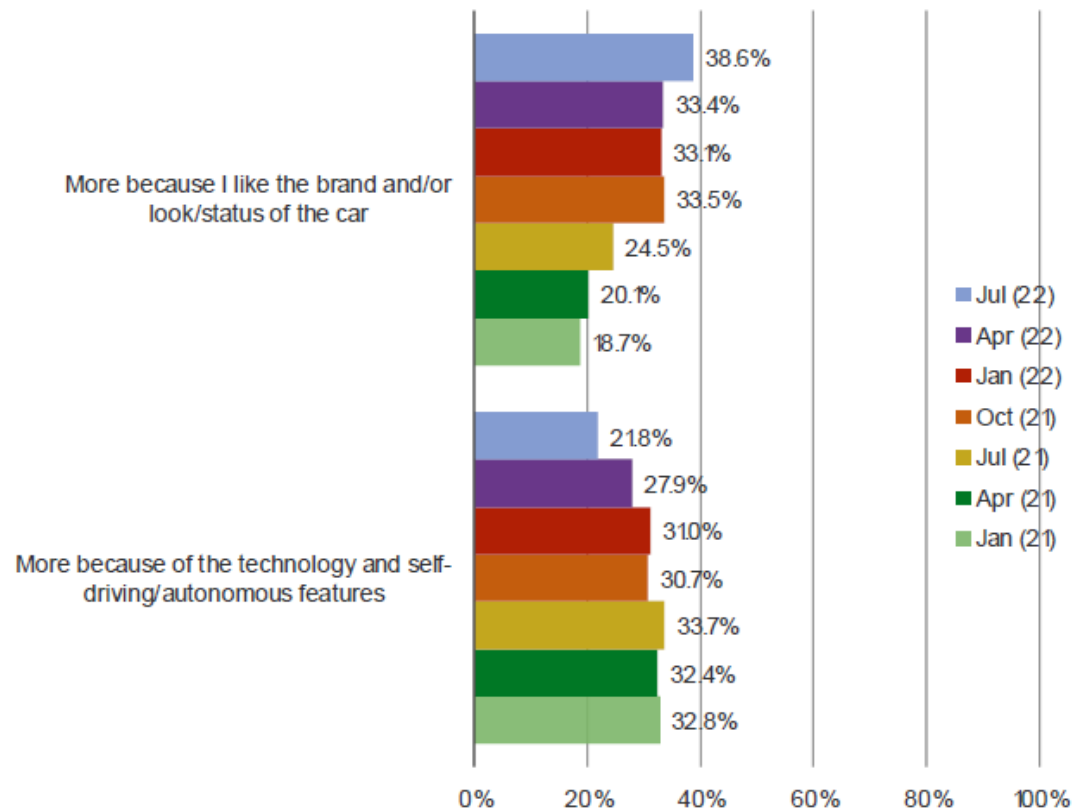
Source: EVs and Autos Survey, US

Tesla Interest “Drivers”

Among those who have interest in getting a Tesla, an increasing percentage say it is because they like the brand or look/status of the car...

WHAT IS THE PRIMARY REASON THAT YOU WOULD BE INTERESTED IN GETTING A TESLA?

Posed to respondents who own/lease a car and have interest in getting a Tesla.



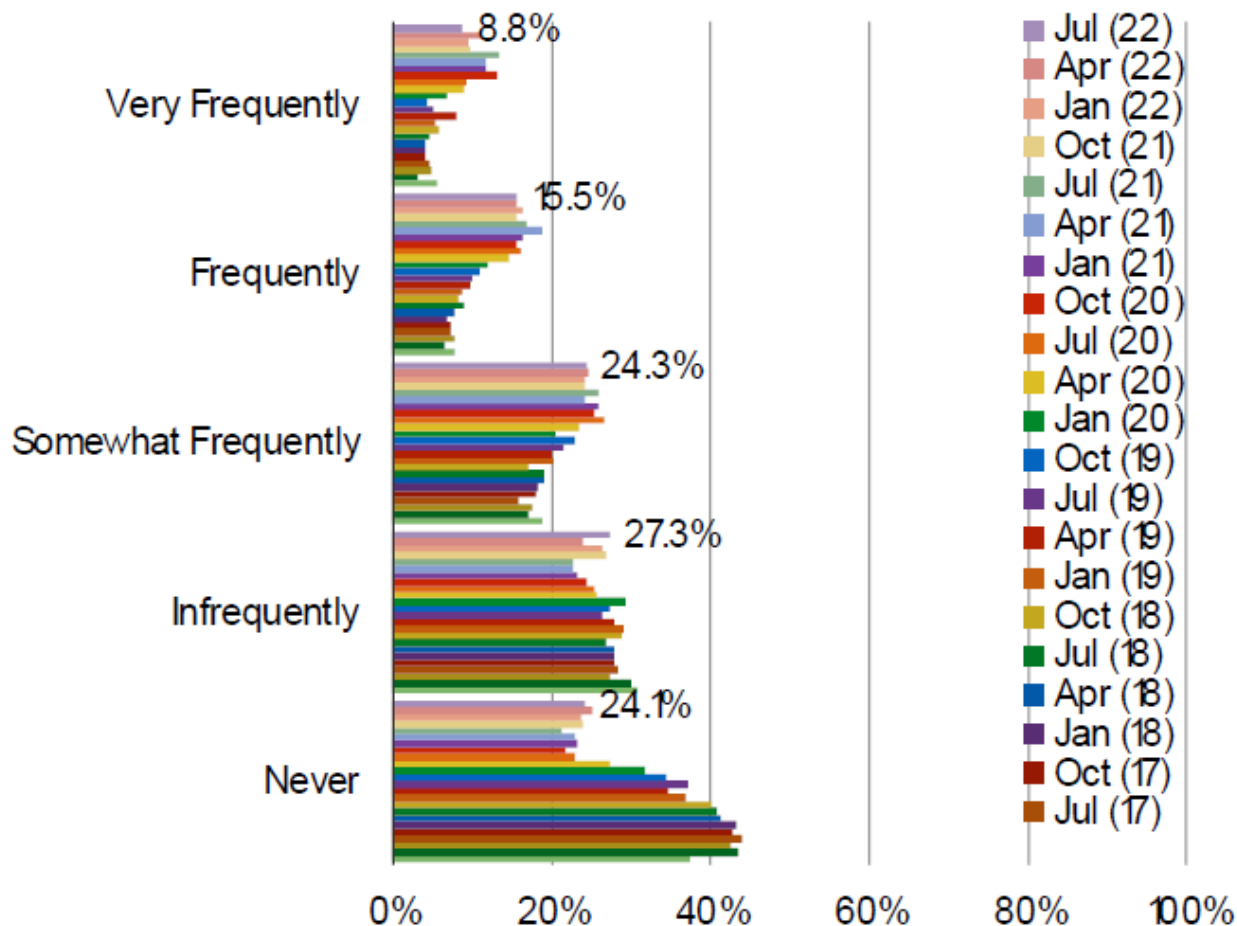
Source: EVs and Autos Survey, US

Food Delivery Usage

Usage of food delivery apps jumped higher during the pandemic. The data has regressed since, but remains above pre-pandemic levels...

HOW OFTEN DO YOU ORDER FOOD THROUGH WEBSITES ONLINE OR THROUGH APPS?

Posed to all respondents.



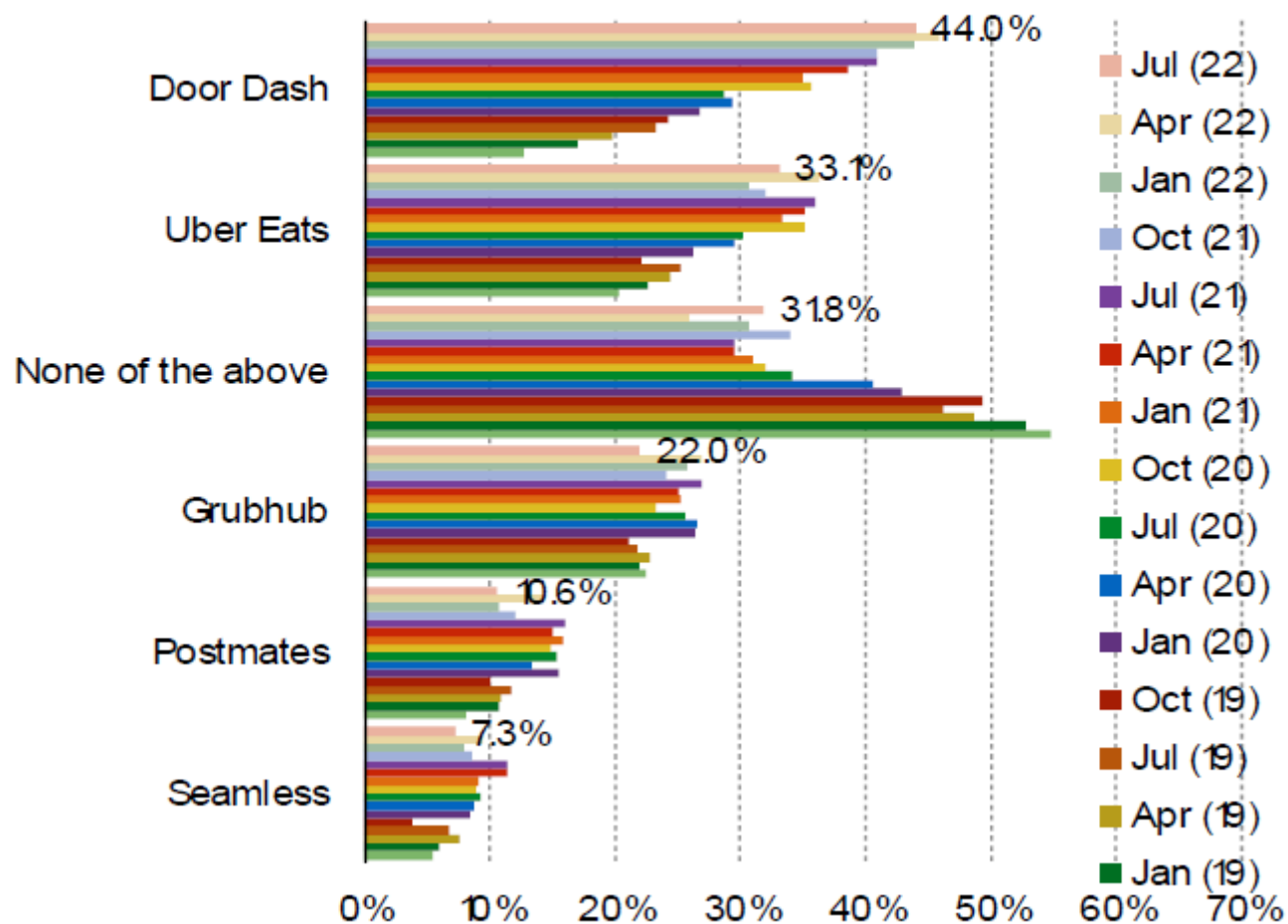
Source: Food Delivery Survey, US

Food Delivery Apps Share

DoorDash popularity has exploded higher over the history of our survey...

DO YOU REGULARLY OR OCCASIONALLY USE ANY OF THE FOLLOWING PLATFORMS FOR ORDERING TAKEOUT FOOD DELIVERY?

Posed to respondents who use food delivery apps.



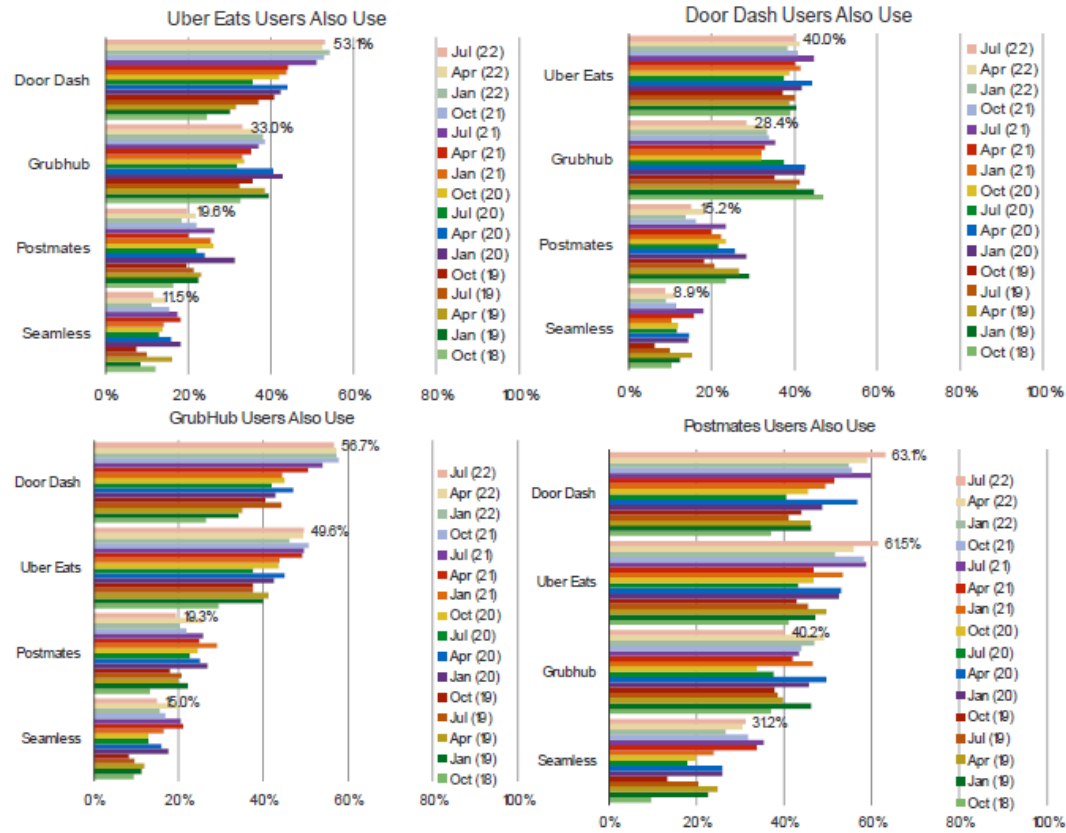
Source: Food Delivery Survey, US

Food Delivery Apps Share Shifts

DoorDash has gained share from virtually everyone...

CROSS-OVER: REGULARLY OR OCCASIONALLY USES EACH OF THE FOLLOWING, WHAT OTHER PLATFORMS DO THEY ALSO USE REGULARLY OR OCCASIONALLY?

Posed to respondents who use food delivery apps.



	N=
Uber Eats	382
Door Dash	508
Seamless	84
Grubhub	254
Postmates	122

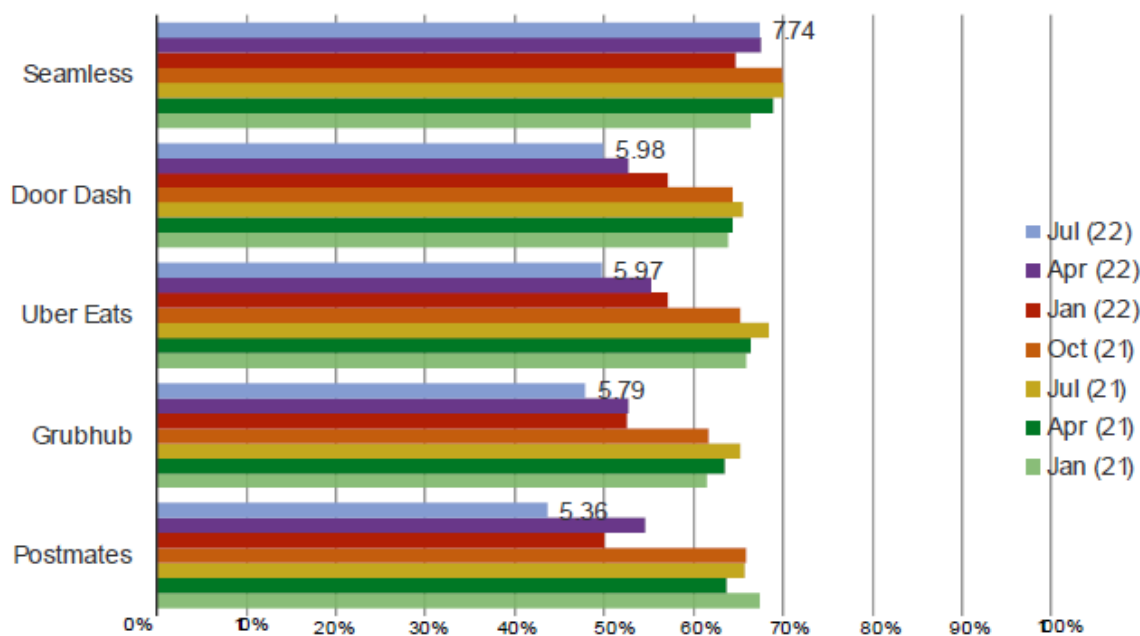
Source: Food Delivery Survey, US

Food Delivery Order Share

The share of orders made through each of the apps we ask about has declined (indicating that people are either crossing over more or ordering directly from the restaurants)...

WHAT PERCENTAGE OF YOUR FOOD DELIVERY/TAKEAWAY ORDERS DO YOU MAKE THROUGH THE FOLLOWING?

Posed to respondents who have the following downloaded on their smartphone.



	N=
Uber Eats	426
Door Dash	549
Seamless	90
Grubhub	295
Postmates	112

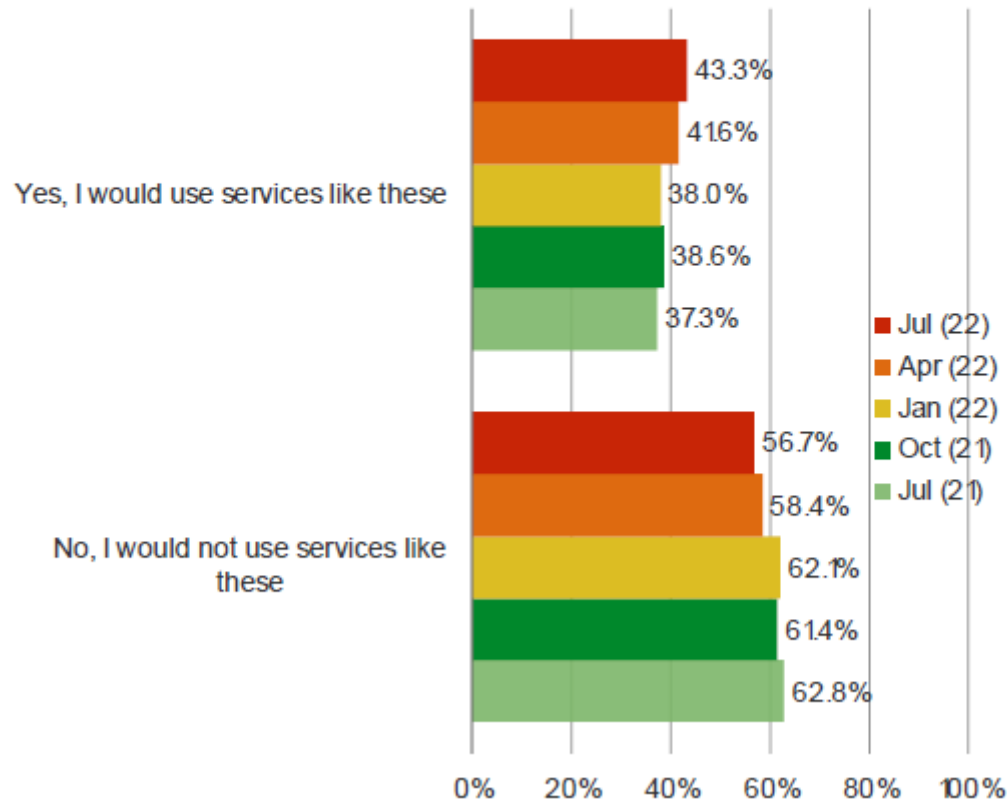
Source: Food Delivery Survey, US

BNPL Usage

An increasing percentage of consumers would use BNPL options...

WOULD YOU USE "BUY NOW AND PAY LATER" SERVICES IN WHICH YOU COULD BUY A PRODUCT FROM A RETAILER NOW AND PAY LATER WITHOUT THE NEED FOR TRADITIONAL CREDIT, UPFRONT FEES, OR INTEREST (UNLESS YOU ARE LATE ON A PAYMENT)?

Posed to all respondents.



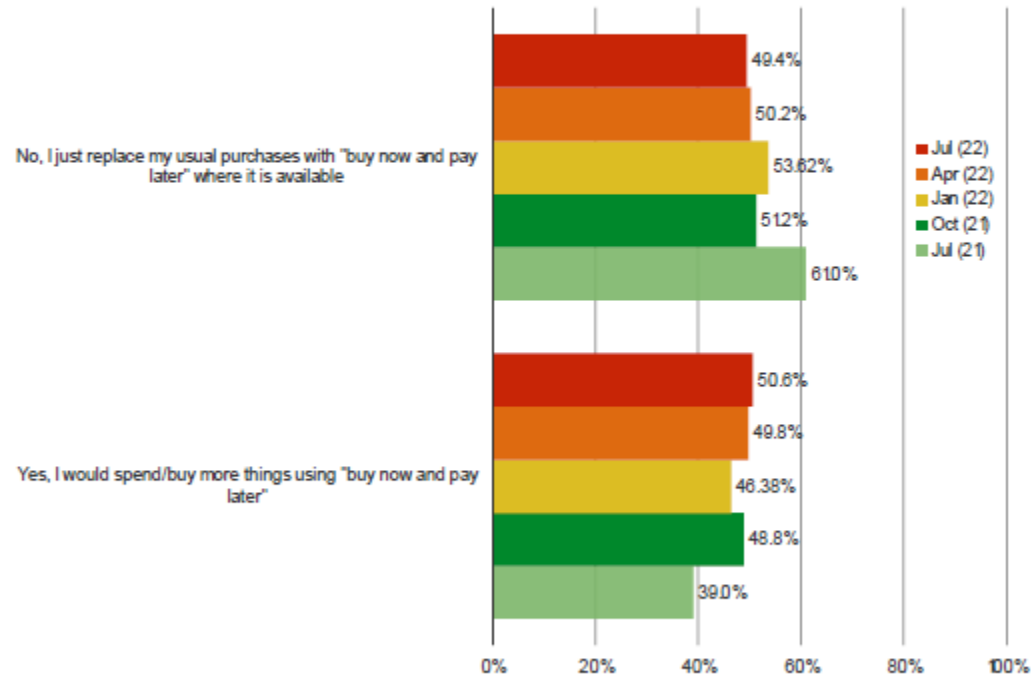
Source: BNPL Survey, US

BNPL and Spending

An increasing percentage of those who said they would use BNPL are saying that it would compel them to spend more/buy more things...

IN YOUR OPINION, WOULD "BUY NOW AND PAY LATER" CHANGE HOW MUCH YOU SPEND/BUY?

Posed to respondents who said they would use buy now and pay later services.



N = 447

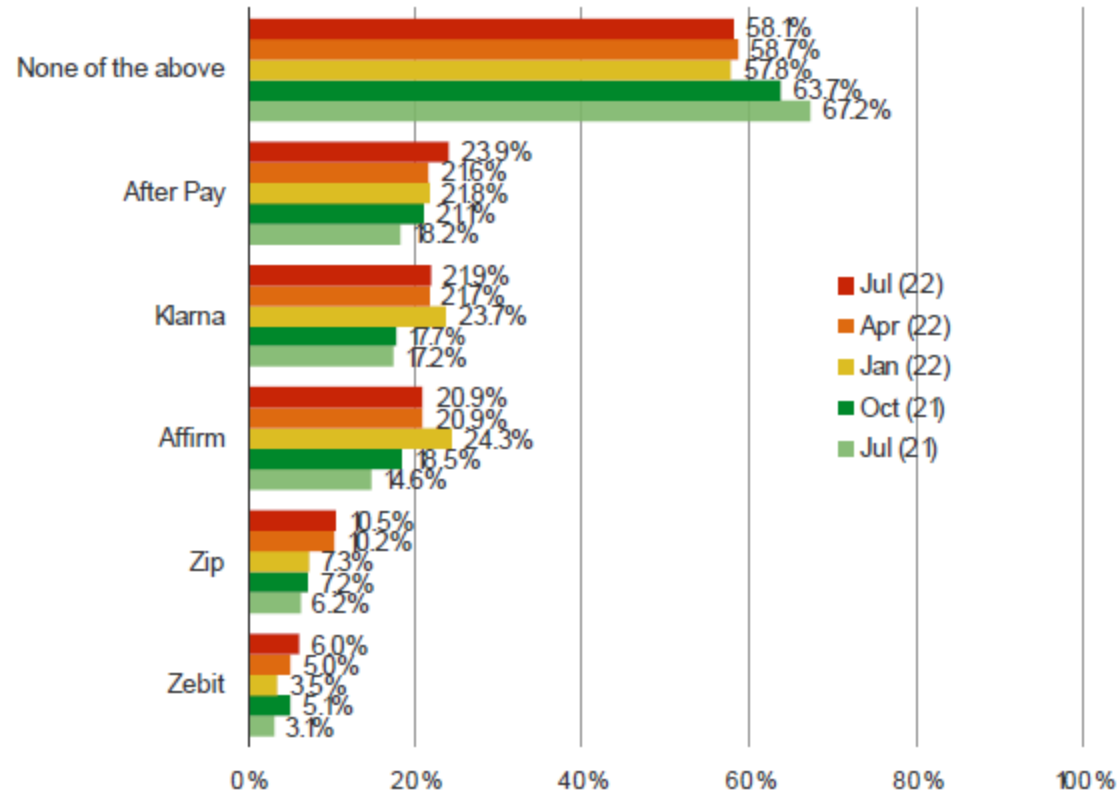
Source: BNPL Survey, US

BNPL Platform Awareness

Consumer awareness of BNPL platforms has been increasing...

HAVE YOU HEARD OF ANY OF THE FOLLOWING?

Posed to all respondents.



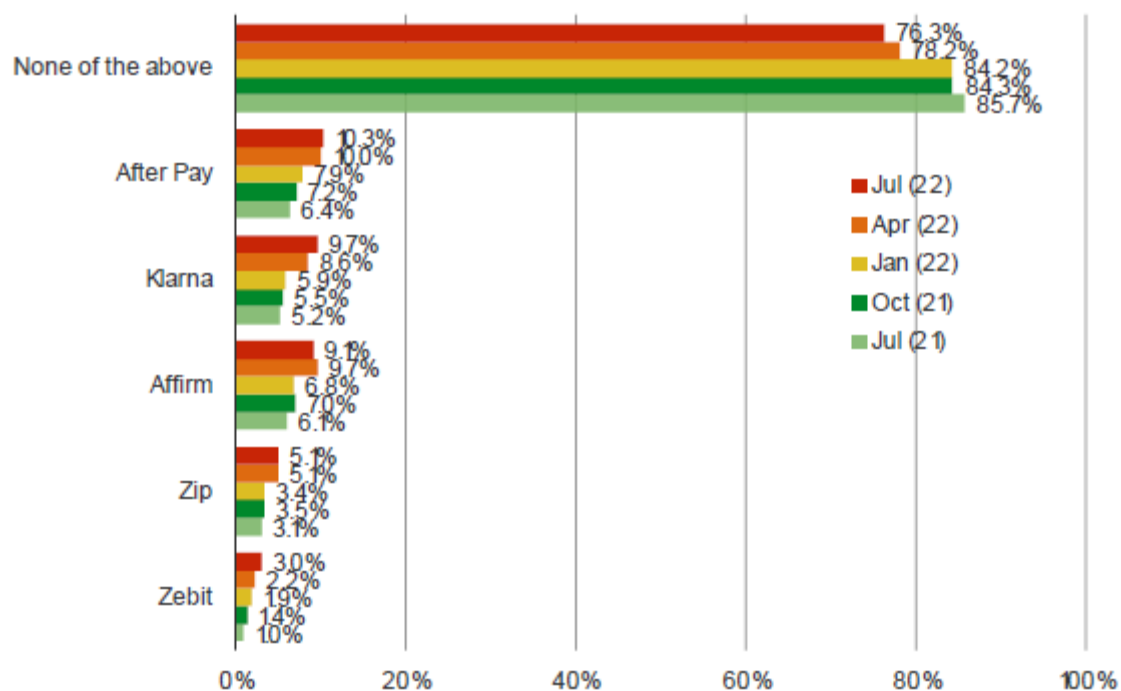
Source: BNPL Survey, US

BNPL Platform Usage

Consumer usage of BNPL platforms has been increasing...

HAVE YOU EVER USED ANY OF THE FOLLOWING?

Posed to all respondents.



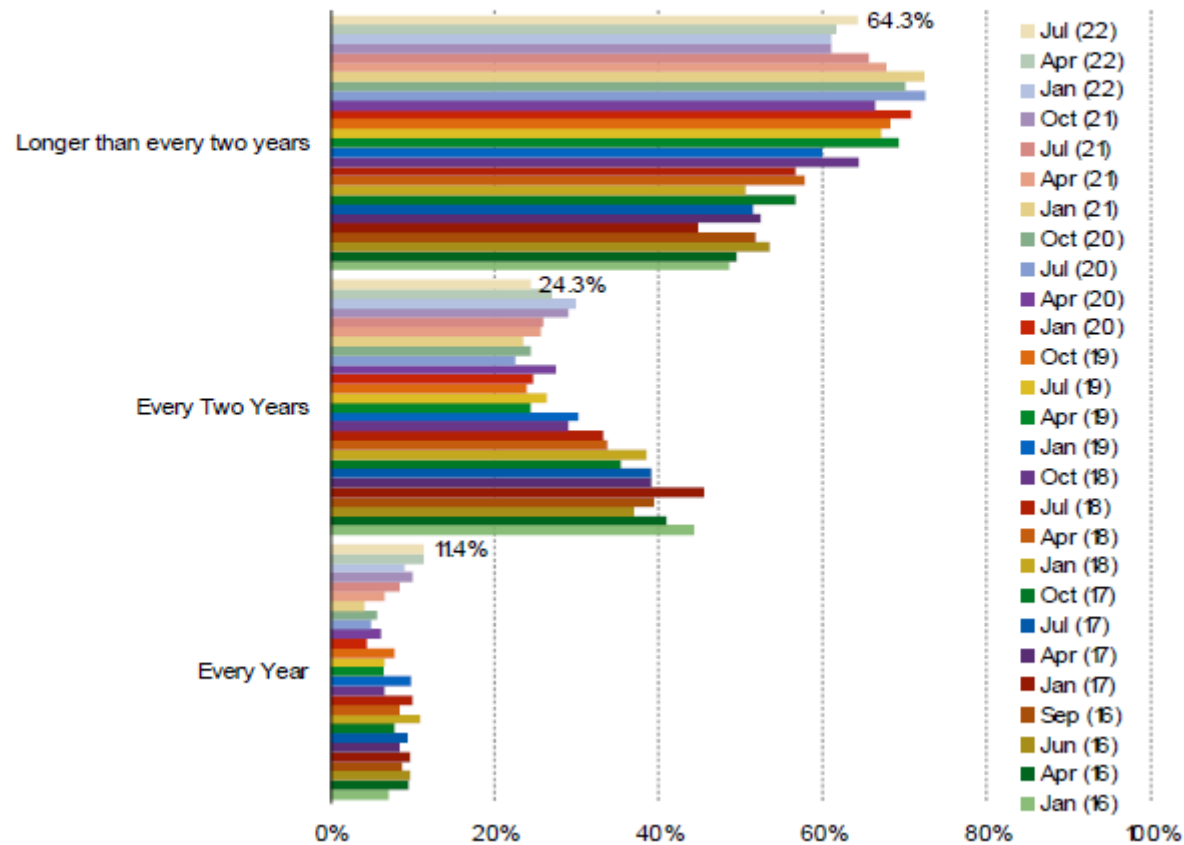
Source: BNPL Survey, US

Smartphone Refresh Cycles

Smartphone refresh cycles have extended over time, but more recently the percentage who buy frequently increased...

EXPECTATIONS FOR HOW FREQUENTLY CONSUMERS WILL PURCHASE NEW SMARTPHONES GOING FORWARD

This question was posed to smartphone owners.



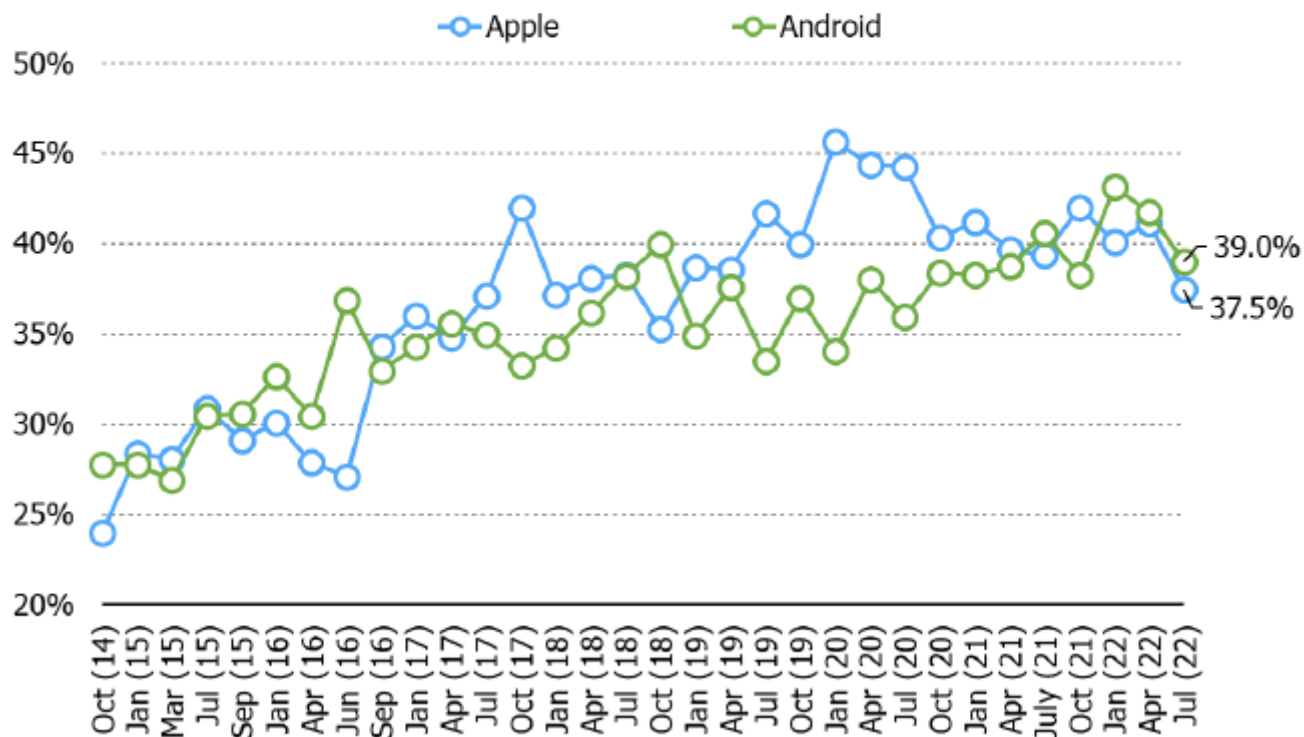
Source: Consumer Electronics Survey, US

Smartphone OS Share and Stickiness

Most smartphone owners have owned the same type of OS for multiple refreshes – ie, fewer “jump balls” ...

“TRIPLE PLAYS” – PERCENTAGE OF SMARTPHONE OWNERS WHO OWN THE SAME OPERATING SYSTEM FOR LAST PHONE, CURRENT PHONE, AND PLAN TO USE SAME FOR NEXT PHONE

This question was posed to smartphone owners.



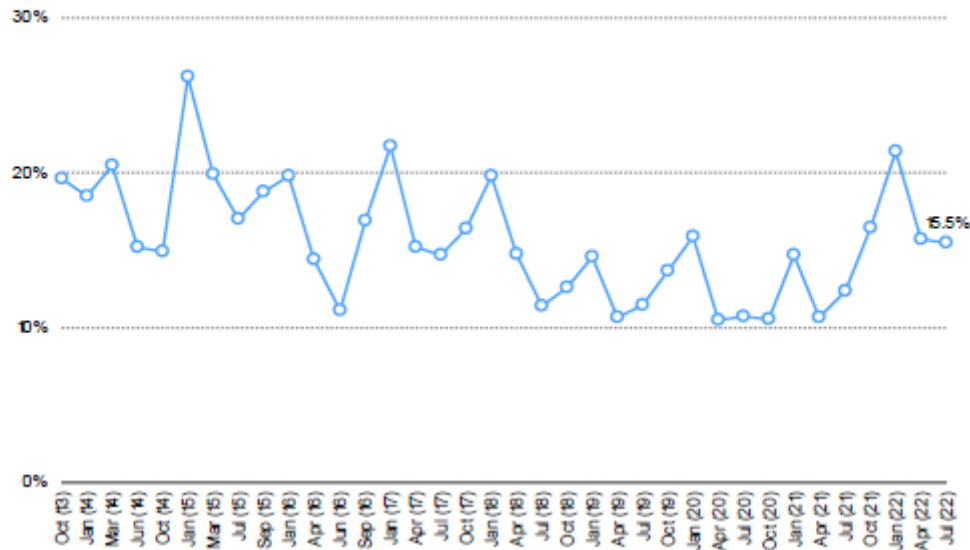
Source: Consumer Electronics Survey, US

iPhone Purchases

2022 broke out of a down pattern in iPhone purchase recency among the iPhone user base...

GOT IPHONE WITHIN PAST THREE MONTHS

This question was posed to iPhone owners.



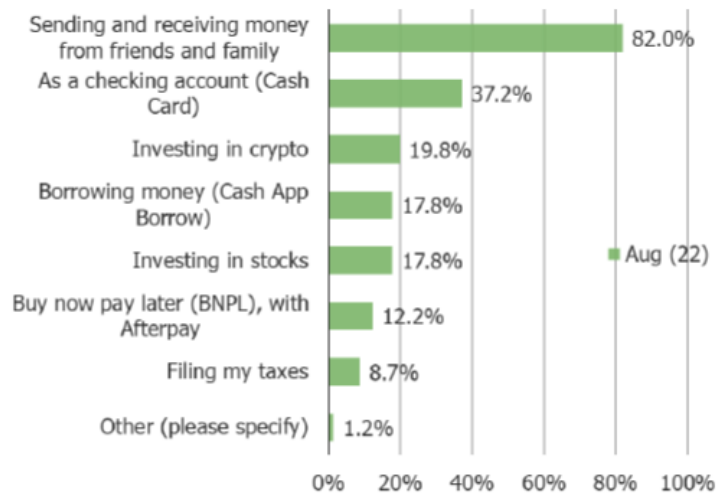
Source: Consumer Electronics Survey, US

Cash App Use Cases

Somewhere in the range of 37-47% Cash App users use it as their primary bank...

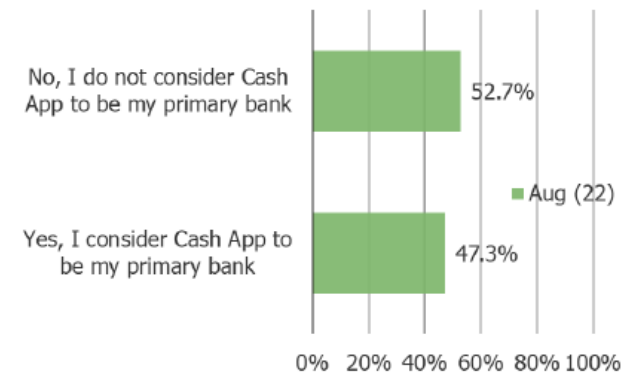
WHAT DO YOU USE CASH APP FOR? SELECT ALL THAT APPLY

Posed to all respondents who use Cash App (N = 484).



WOULD YOU CONSIDER CASH APP TO BE YOUR PRIMARY BANK (IN OTHER WORDS, YOUR DEFAULT ACCOUNT FOR SAVINGS)?

Posed to all respondents who use Cash App (N = 484).



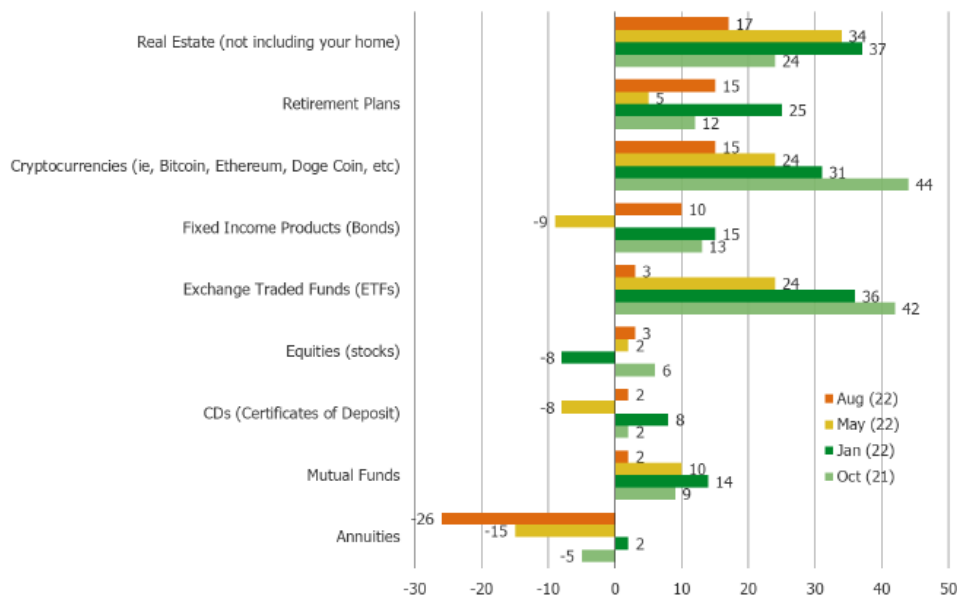
Source: Mobile Payments Survey, US

Crypto Sentiment

Crypto is falling out of favor with both existing investors and with those who are aware of it...

HOW LIKELY ARE YOU TO RECOMMEND BUYING THE FOLLOWING TO A FRIEND OR COLLEAGUE?

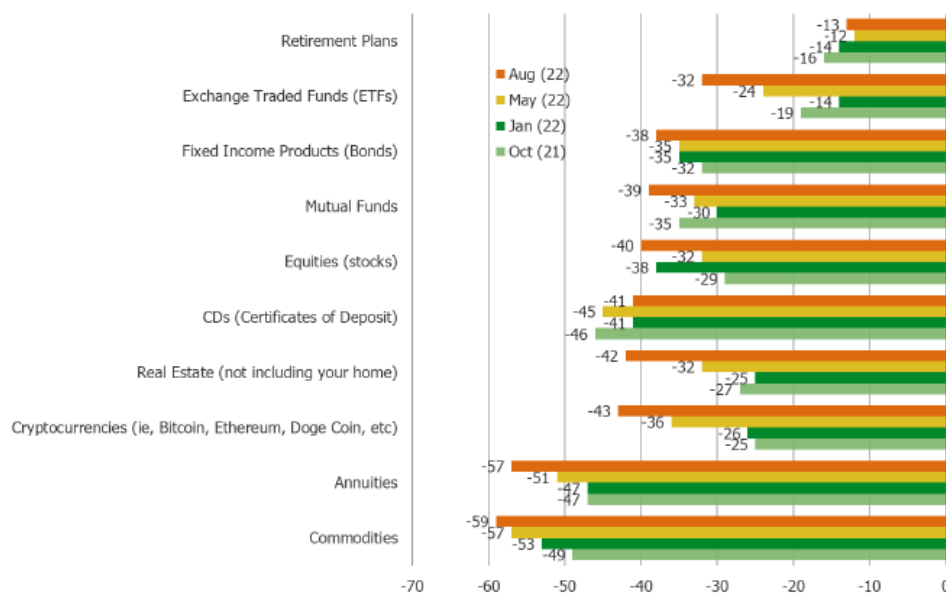
Posed to respondents who said they **currently invest** in each of the following.



	N =
Annuities	89
Fixed Income Products (Bonds)	70
CDs (Certificates of Deposit)	116
Equities (stocks)	175
Retirement Plans	245
Mutual Funds	158
Cryptocurrencies (ie, Bitcoin, Ethereum, Doge Coin, etc)	202
Exchange Traded Funds (ETFs)	103
Real Estate (not including your home)	58

HOW LIKELY ARE YOU TO RECOMMEND BUYING THE FOLLOWING TO A FRIEND OR COLLEAGUE?

Posed to respondents who said they **are aware** of each of the following.



	N =
Cryptocurrencies (ie, Bitcoin, Ethereum, Doge Coin, etc)	544
Equities (stocks)	467
Fixed Income Products (Bonds)	370
Real Estate (not including your home)	452
Mutual Funds	530
Exchange Traded Funds (ETFs)	345
CDs (Certificates of Deposit)	525
Retirement Plans	559
Annuities	439
Commodities	263

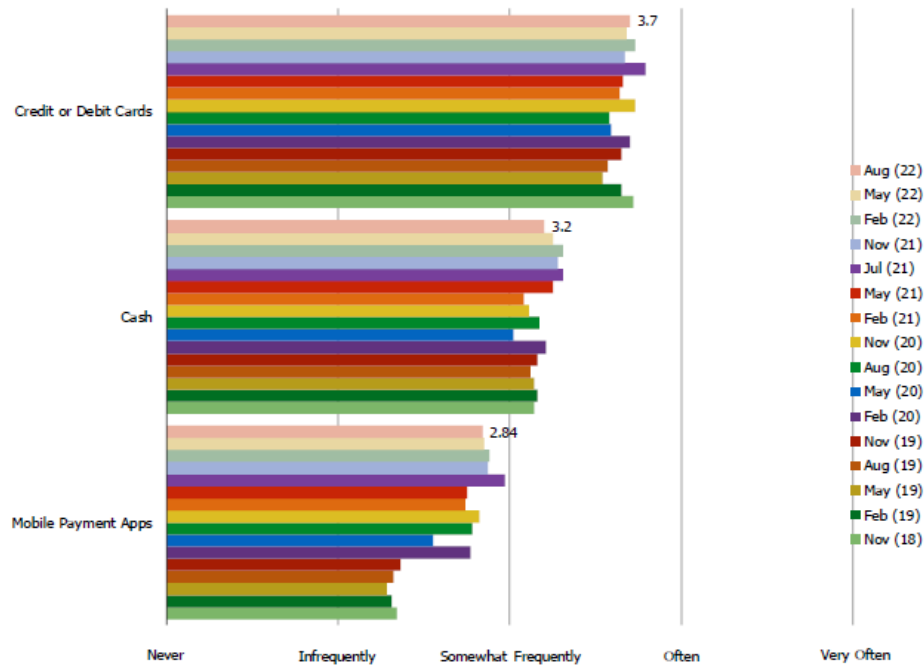
Source: Mobile Payments Survey, US

Mobile Payments Usage

Usage of mobile payments platforms has trended higher over time. It is consistently viewed as a significant popularity gainer for spending and transferring money...

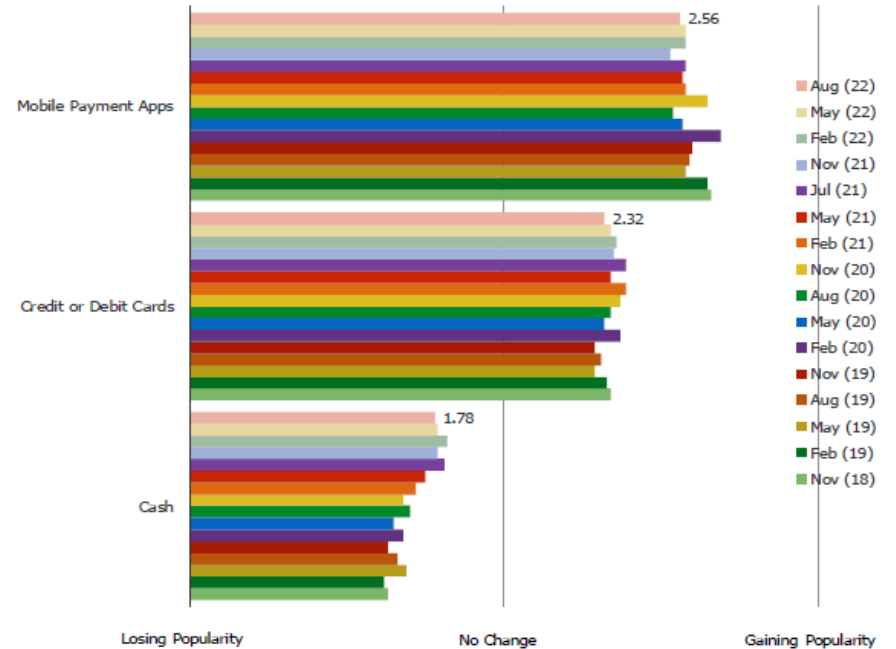
HOW OFTEN DO YOU USE THE FOLLOWING TO SPEND OR TRANSFER MONEY?

Posed to all respondents



DO YOU THINK THE FOLLOWING ARE GAINING OR LOSING POPULARITY AS A METHOD FOR SPENDING OR TRANSFERRING MONEY?

Posed to all respondents



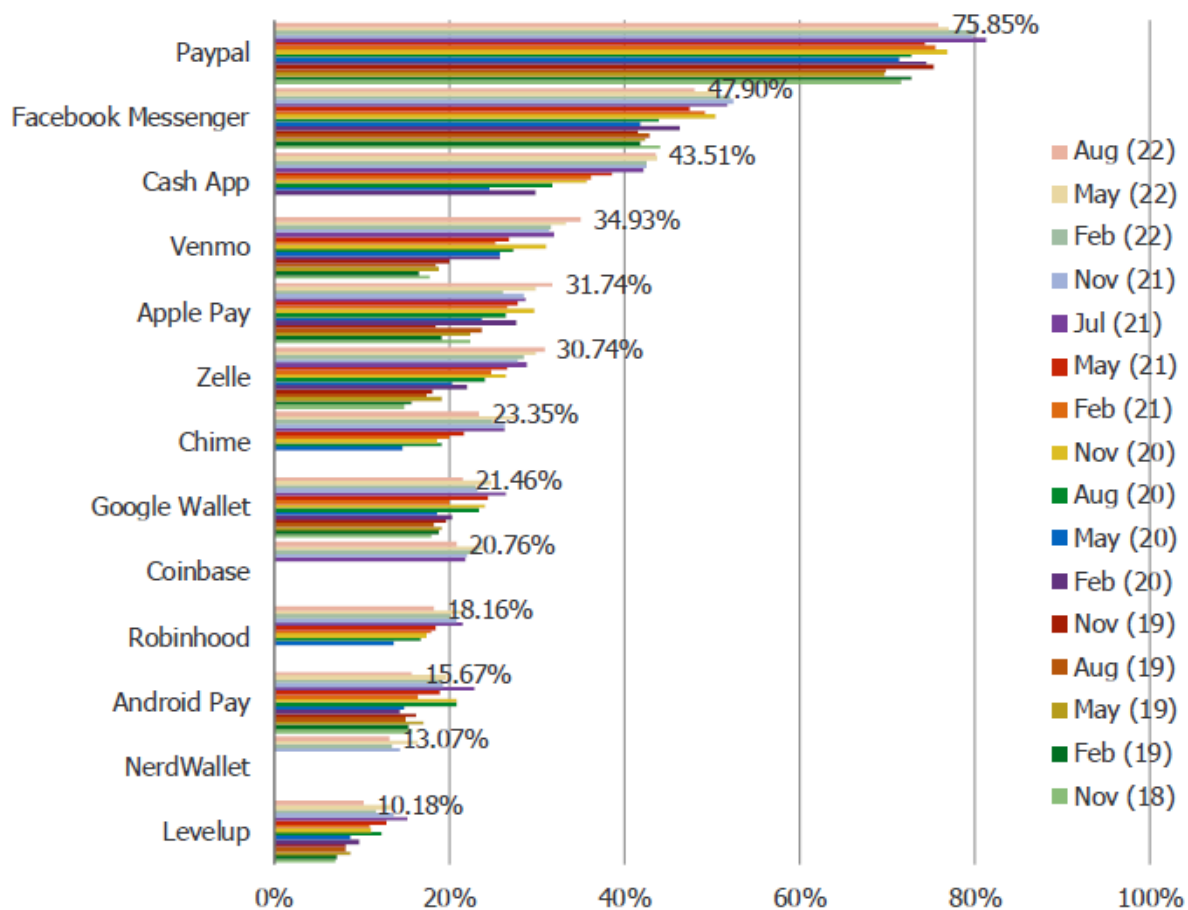
Source: Mobile Payments Survey, US

Mobile Payments Usage, By Platform

Both Cash App and Venmo have gained in popularity throughout the history of our survey...

DO USE ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents



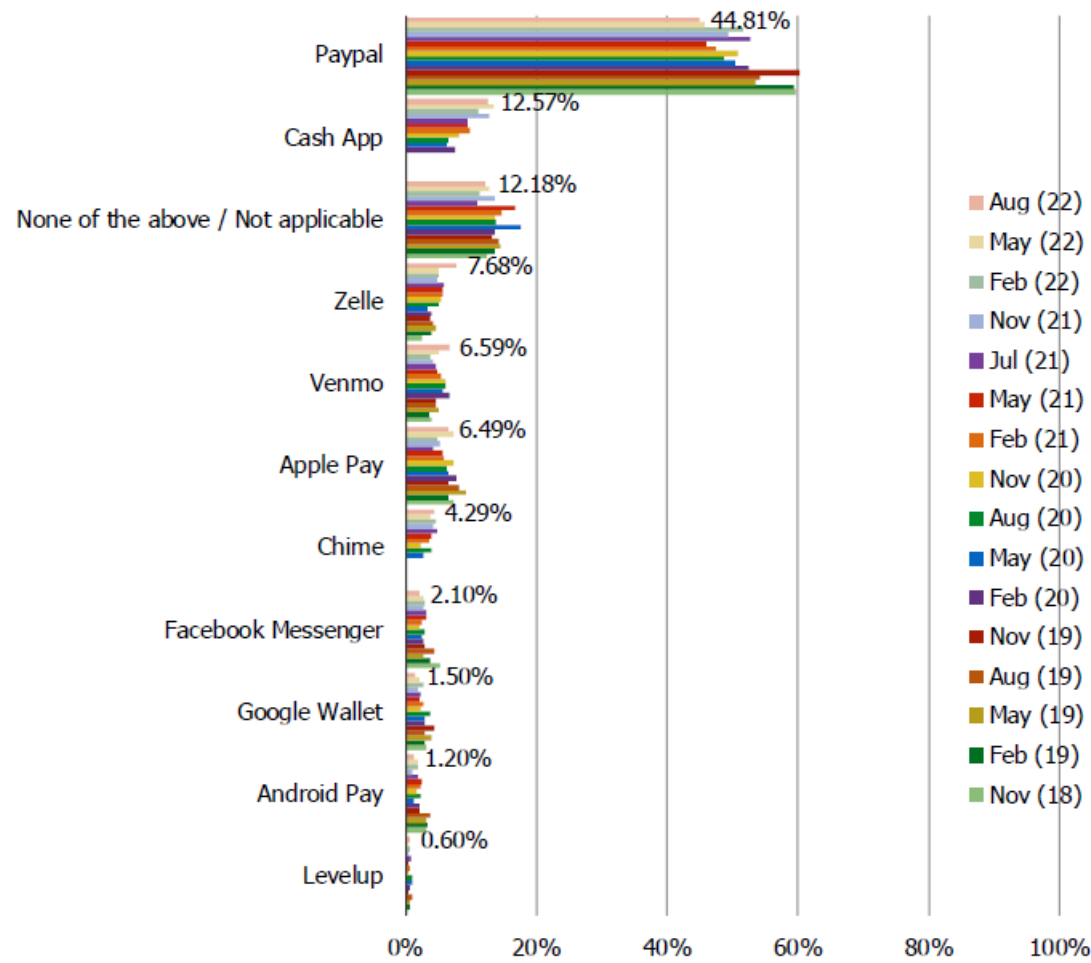
Source: Mobile Payments Survey, US

Mobile Payments Platform Preference

Cash app, Zelle, and Venmo have grown in the percentages of consumers that regard them as the best mobile payments app...

IF YOU COULD ONLY USE ONE OF THE FOLLOWING MOBILE PAYMENTS APP/PLATFORMS GOING FORWARD, WHICH WOULD YOU CHOOSE?

Posed to all respondents



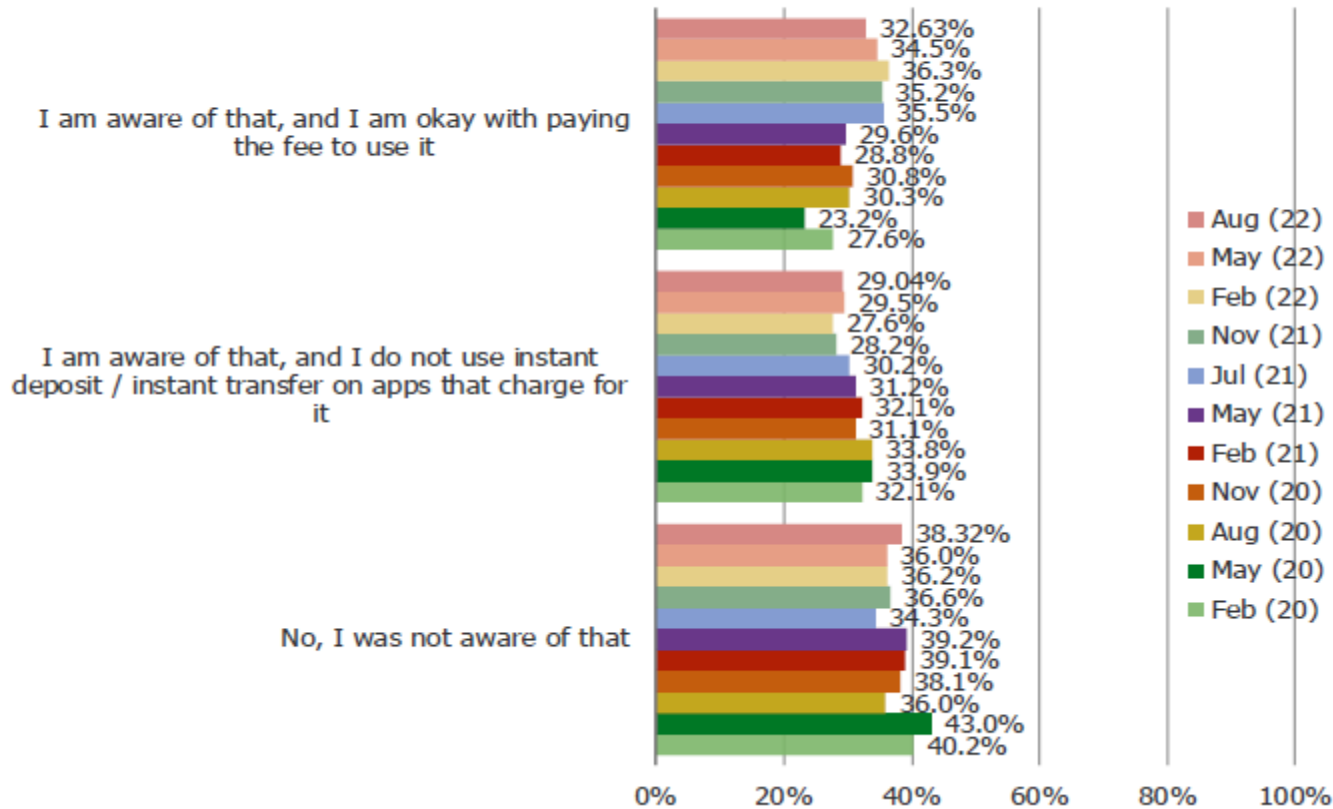
Source: Mobile Payments Survey, US

Instant Transfer Fees

Mobile payments users are increasingly okay with instant transfer fees...

WERE YOU AWARE THAT SOME MOBILE PAYMENT APPS CHARGE A FEE FOR INSTANT DEPOSIT/INSTANT TRANSFER?

Posed to mobile payment app users.



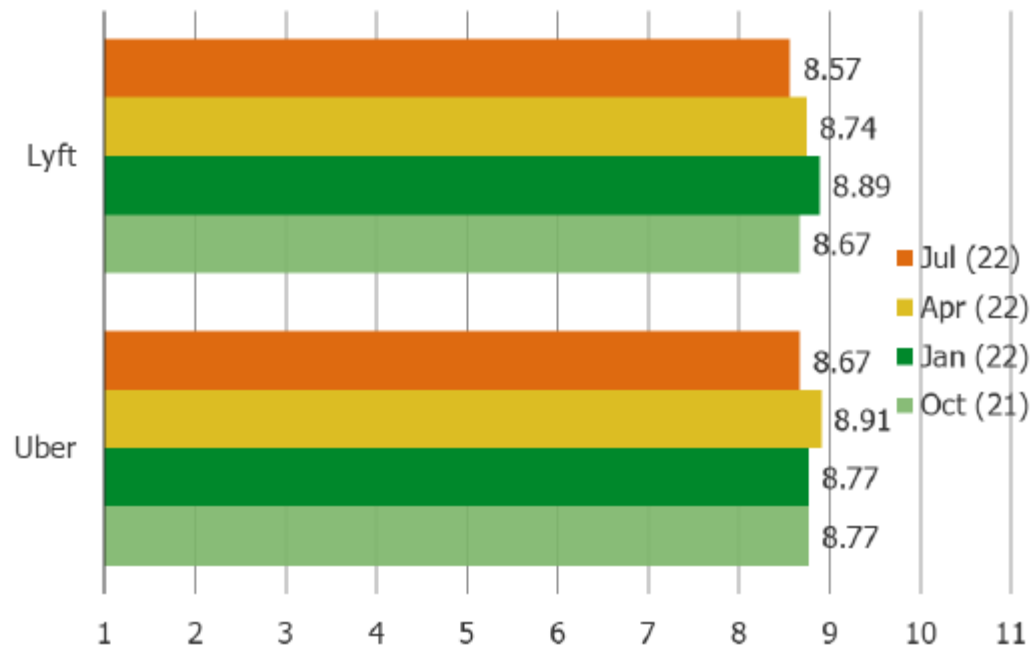
Source: Mobile Payments Survey, US

Ride Sharing Satisfaction

User satisfaction has fallen a touch sequentially, but remains positive overall...

HOW WOULD YOU RATE THE USER EXPERIENCE WHEN INTERACTING WITH THE FOLLOWING?

Posed to respondents who have the following downloaded on their phone.



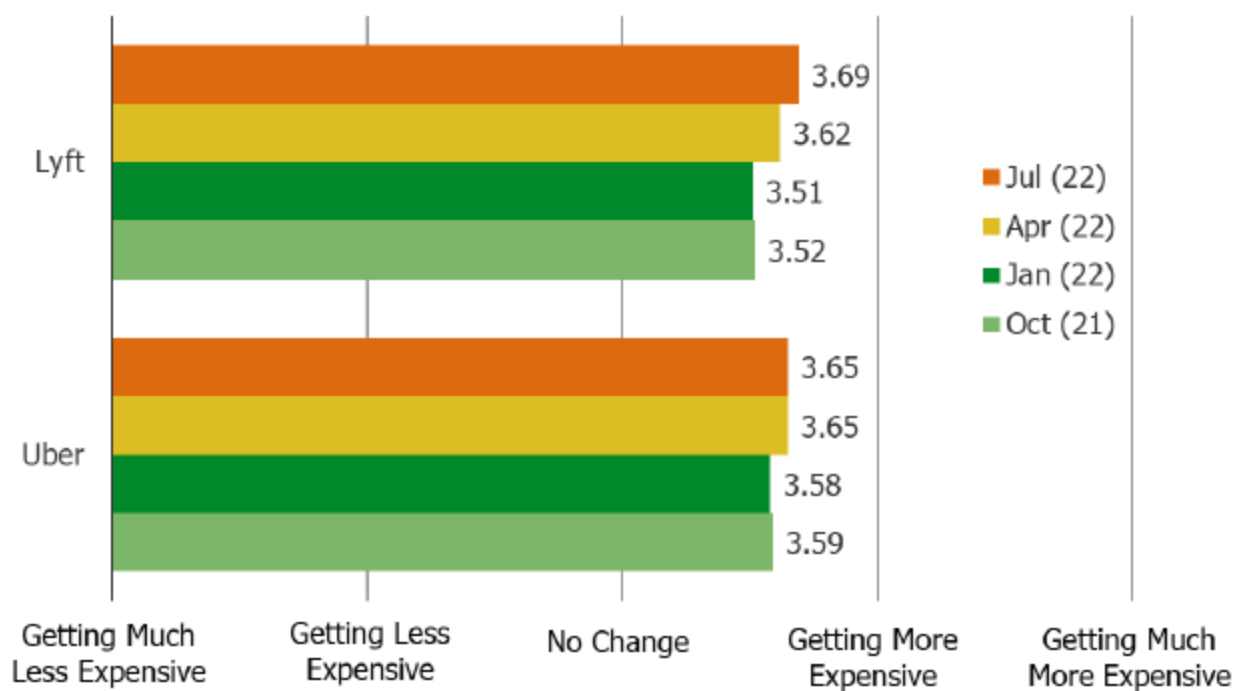
Source: Ride Sharing Survey, US

Ride Sharing Pricing Perceptions

In recent quarters, the share of users reporting that ride sharing apps are getting more expensive has grown...

TO YOUR KNOWLEDGE, HAVE THE PRICES TO USE THE FOLLOWING BEEN CHANGING AT ALL?

Posed to respondents who have the following downloaded on their phone.



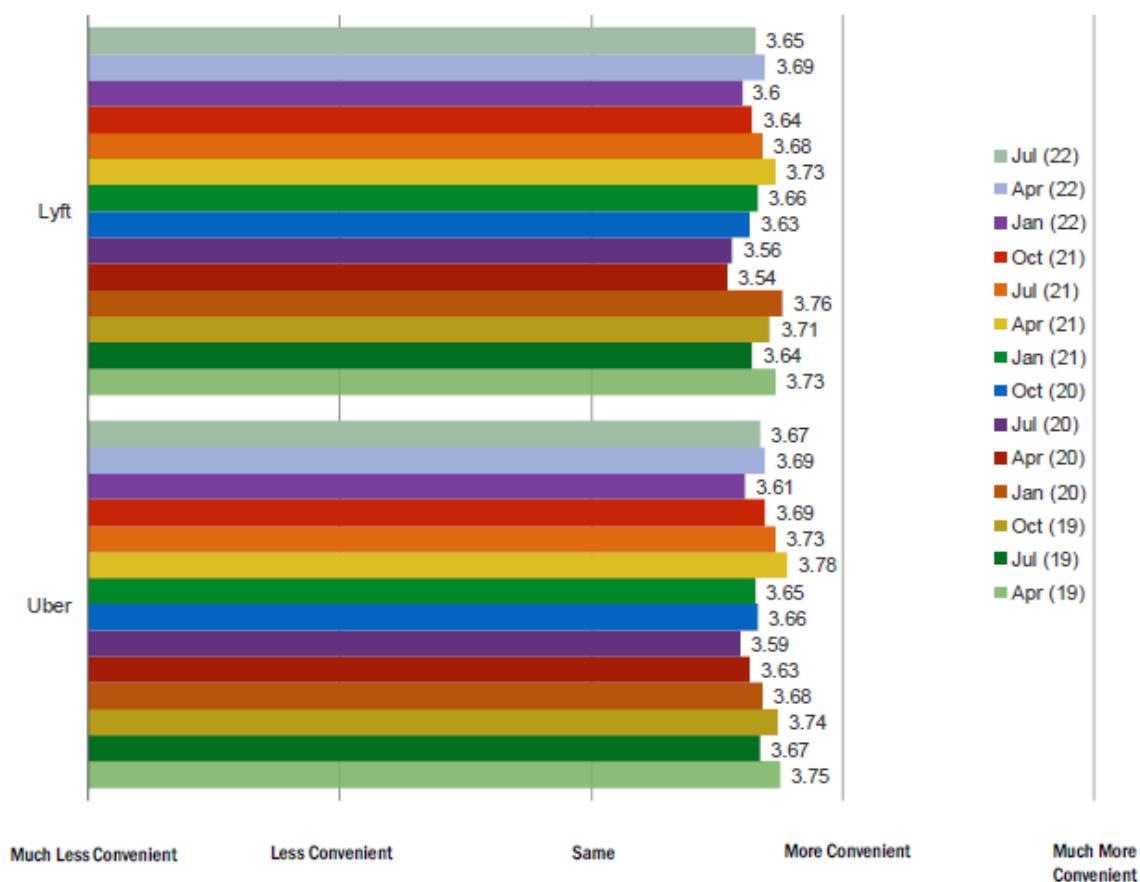
Source: Ride Sharing Survey, US

Ride Sharing Convenience

But ride sharing users consistently view it as more convenient than alternative means of travel...

WHAT IS YOUR OPINION OF THE CONVENIENCE OF USING THIS SERVICE COMPARED TO ALTERNATIVE MEANS YOU WOULD USE TO TRAVEL?

Posed to respondents who use each of the following more often than never.



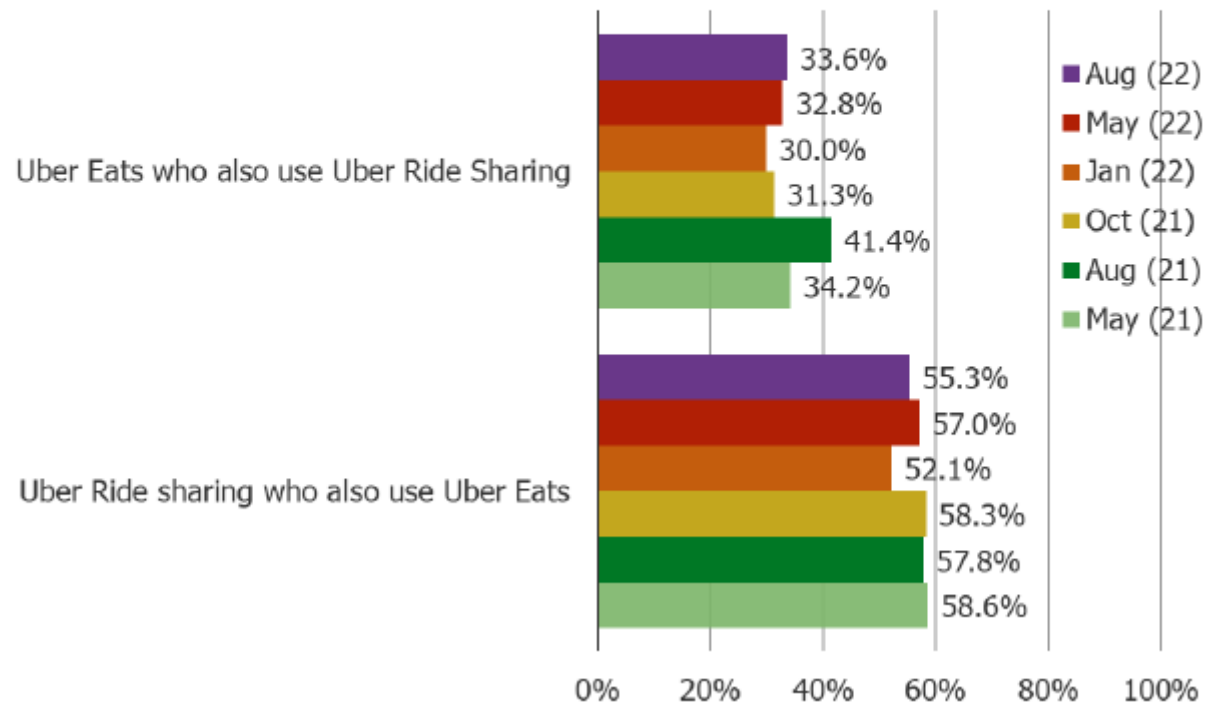
Source: Ride Sharing Survey, US

Uber and Uber Eats Cross-Over

User cross-over is down a touch from series highs but flat sequentially in recent quarters...

% OF UBER EATS USERS WHO USE UBER, AND % OF UBER USERS WHO USE UBER EATS

Posed to respondents who have used Uber and/or Uber Eats.



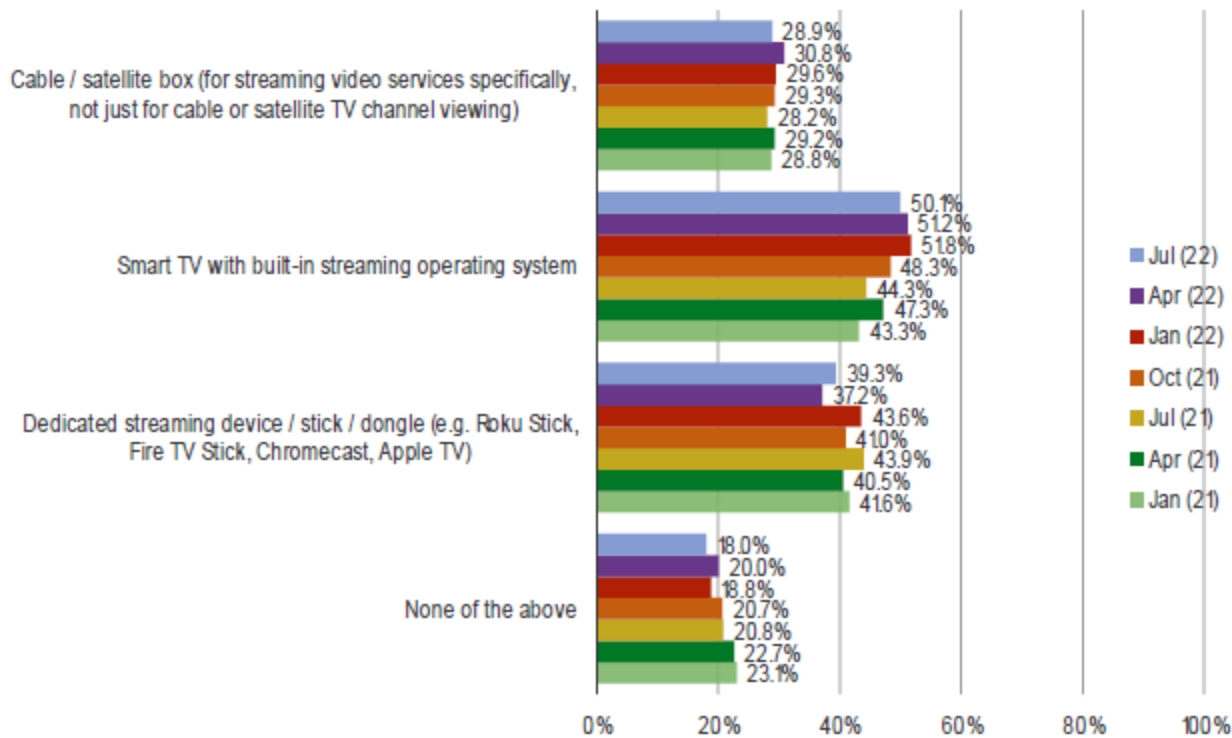
Source: Ride Sharing Survey, US

Streaming Video Methods

Though the trend has flattened in 2022, over the history of our survey there has been a shift from dedicated streaming devices to smart TV's with built-in streaming operating systems...

WHAT HARDWARE DO YOU USE TO WATCH STREAMING VIDEO ON YOUR TV? (SELECT ALL THAT APPLY)

Posed to all respondents.



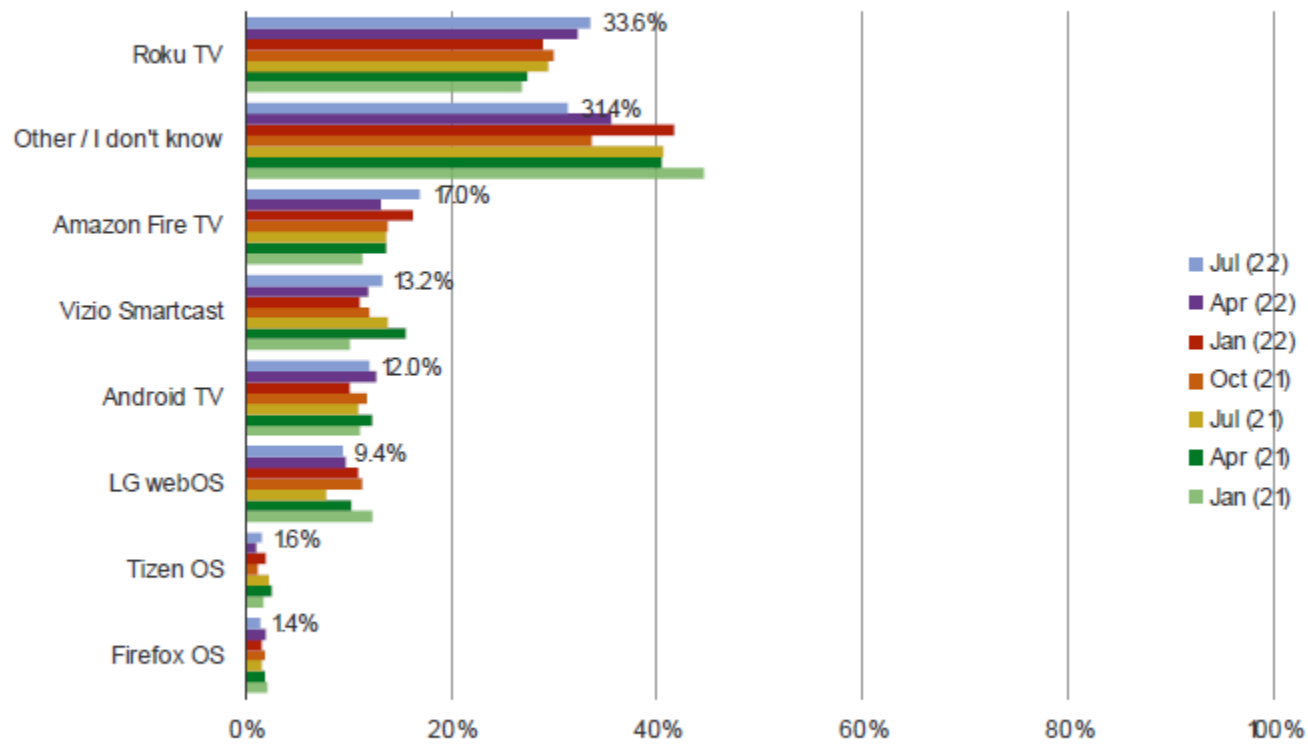
Source: Streaming Players Survey, US

Smart TV OS Share

The percentage of smart TV owners who say their TV uses Roku TV has increased over time...

WHICH BUILT-IN OPERATING SYSTEM DOES YOUR SMART TV RUN? (SELECT ALL THAT APPLY ACROSS ALL THE TVS YOU OWN)

Posed to all respondents who own a smart TV.



N = 500

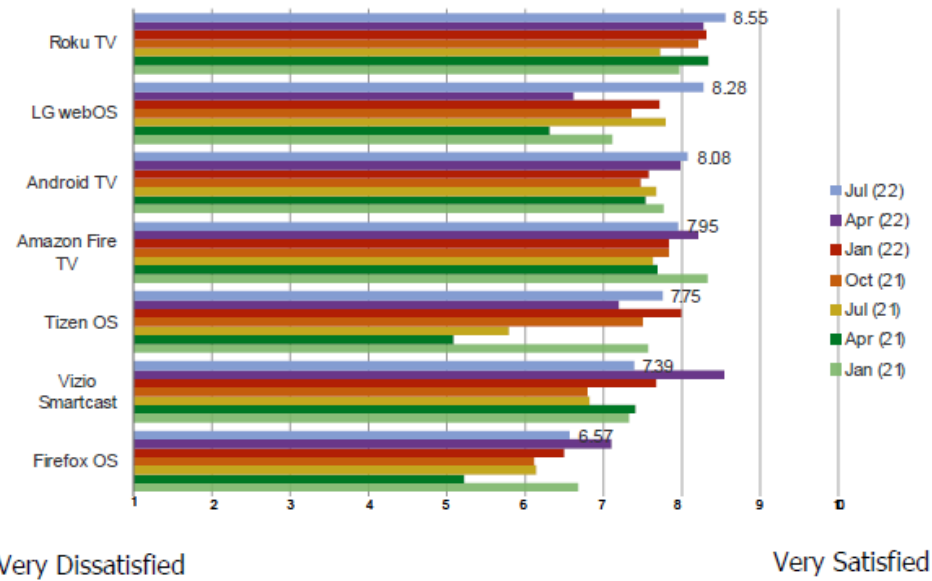
Source: Streaming Players Survey, US

Smart TV OS Satisfaction

Roku TV users report the strongest satisfactions scores, which have improved sequentially...

ON A SCALE FROM 1-10, HOW SATISFIED ARE YOU WITH THE SOFTWARE INTERFACE ON YOUR SMART TV?

Posed to all respondents who own a smart TV and use each of the following.



	N=
Roku TV	168
Android TV	60
Amazon Fire TV	85
Tizen OS	8
Vizio Smartcast	66
Firefox OS	7
LG webOS	47

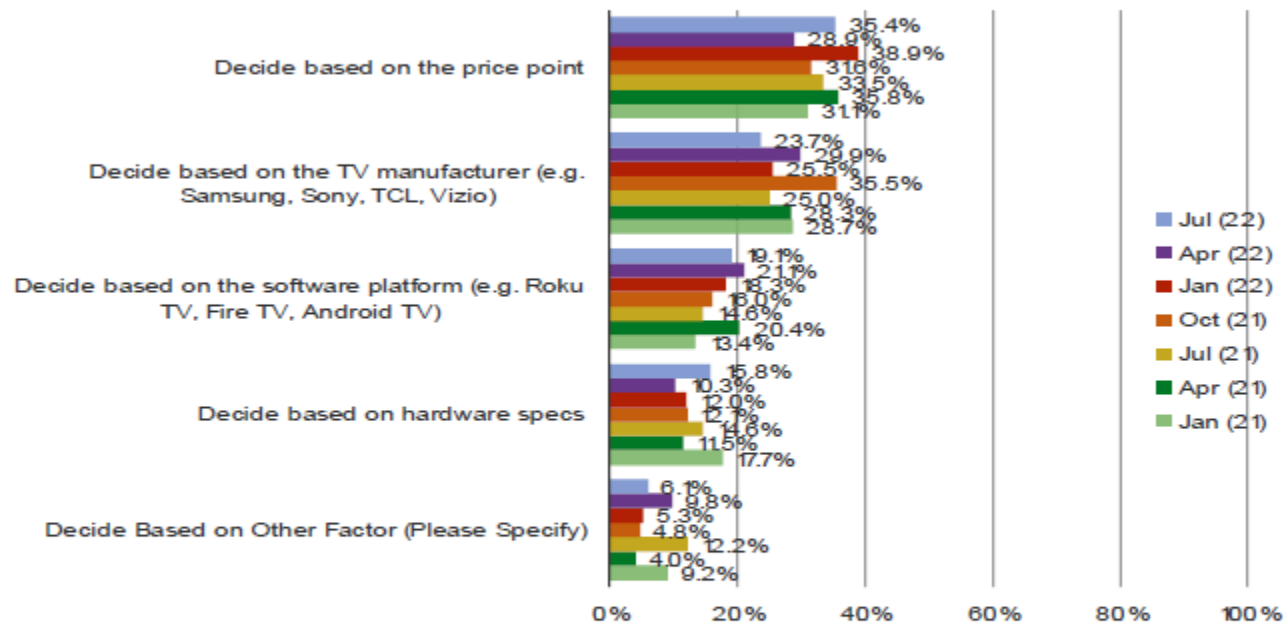
Source: Streaming Players Survey, US

TV Purchase Factors

The TV manufacturer is becoming less important to consumers looking to get a new TV. The software on the platform has gained in importance...

WHAT IS THE PRIMARY FACTOR THAT WILL DETERMINE WHICH TV YOU BUY?

Posed to all respondents who have plans to purchase a smart TV in the next 12-18 months.



N = 215

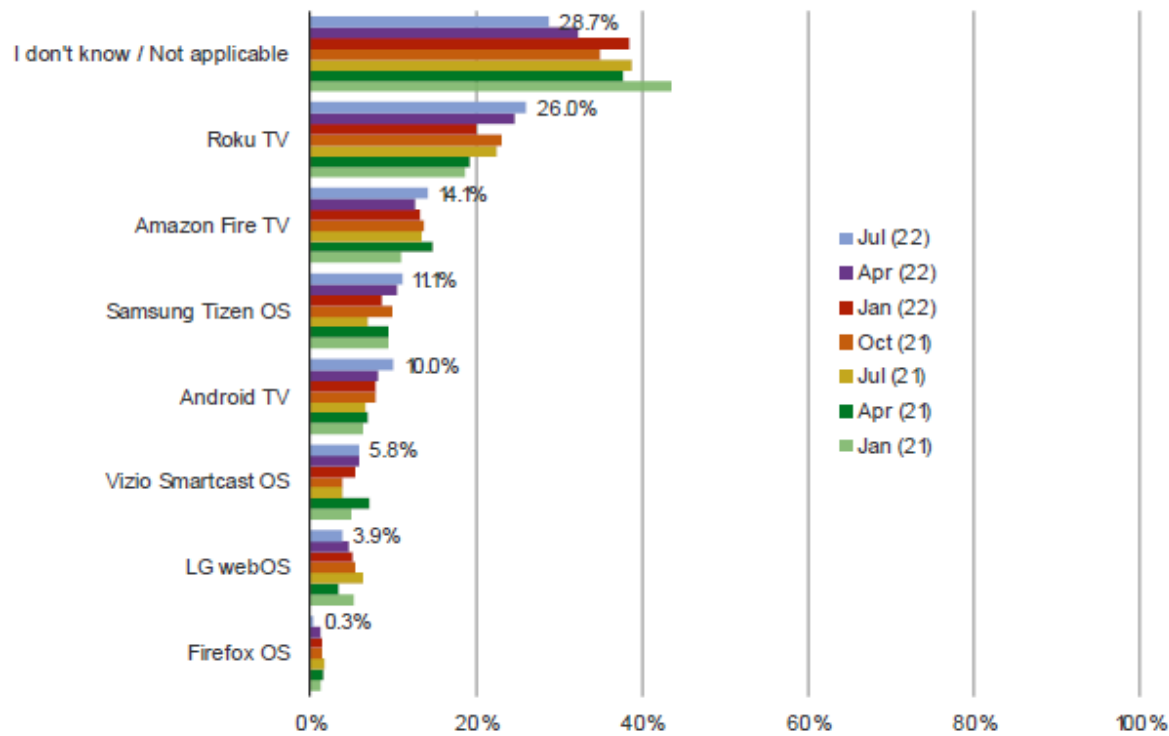
Source: Streaming Players Survey, US

TV OS Preference

Of those looking to buy a smart TV in the next 12-18 months, an increasing percentage would prefer Roku TV above all others...

IF YOU HAD TO PICK ONE OF THE FOLLOWING SMART TV SOFTWARE PLATFORMS, WHICH WOULD YOU CHOOSE?

Posed to all respondents who either currently use a smart TV and/or have plans to purchase a smart TV in the next 12-18 months.



N = 588

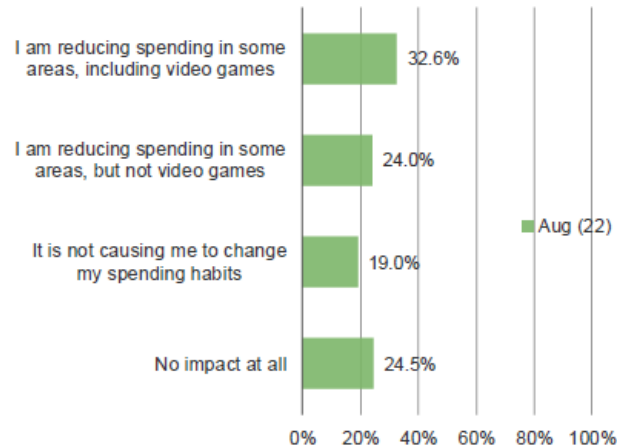
Source: Streaming Players Survey, US

Current Economic Environment and Video Games

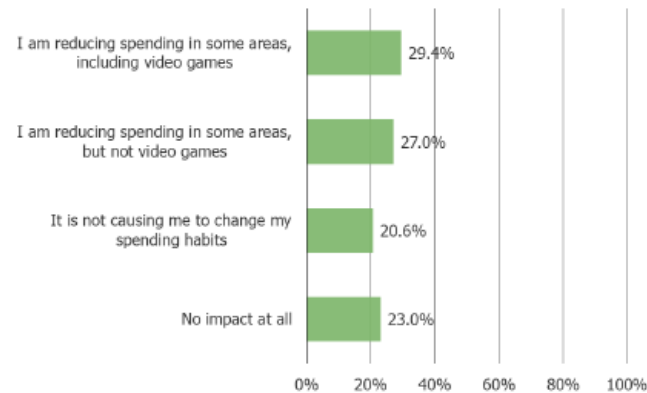
Around a third of gamers say inflation and the current economic environment is impacting their spending on video games. Heavier in-game spenders, however, are a bit more resilient...

WHICH OF THE FOLLOWING BEST DESCRIBES HOW YOU ARE IMPACTED BY INFLATION AND THE CURRENT ECONOMIC LANDSCAPE (IE, POSSIBLE RECESSION)

This question was posed to the target audience.



Cross-tab: Respondents who typically spend \$50 or more per month on in-game purchases (top 1/3 of spenders in our survey).



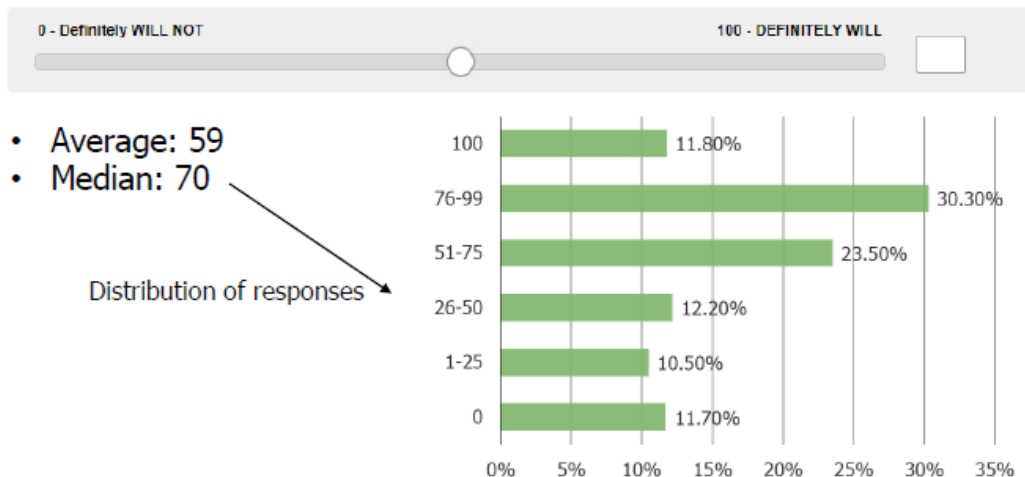
Source: Video Gamers Survey, US

Call of Duty, Modern Warfare 2 Interest

Most gamers who have bought COD in the past are interested in the upcoming iteration. A DMZ game mode would nudge some on the fence to buy it...

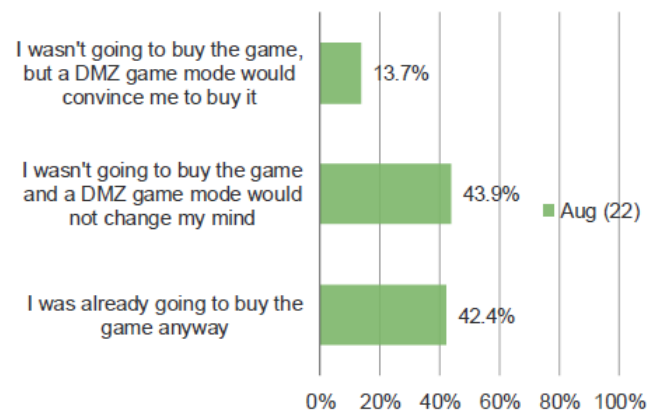
HOW LIKELY ARE YOU TO BUY CALL OF DUTY: MODERN WARFARE 2 AFTER IT RELEASES ON OCTOBER 28TH, 2022?

This question was posed to the target audience.



IF THERE IS A DMZ GAME MODE IN CALL OF DUTY WARFARE 2, WOULD THAT IMPACT HOW INTERESTED YOU ARE IN THE GAME?

This question was posed to the target audience.



Likelihood of buying Modern Warfare (0-100), cross-tabulated:

Crosstab (Filter):	Likelihood of buying Modern Warfare 2
All Respondents	59
Bought Call of Duty in 2021	82
Bought Call of Duty in 2020	80
Bought Call of Duty in 2019	78
Downloaded Warzone	78
Typical interest in COD releases: Extremely interested	91
Typical interest in COD releases: Very Interested	78
Typical interest in COD releases: Somewhat Interested	58
Typical interest in COD releases: Not so interested	28
Typical interest in COD releases: Not at all interested	8

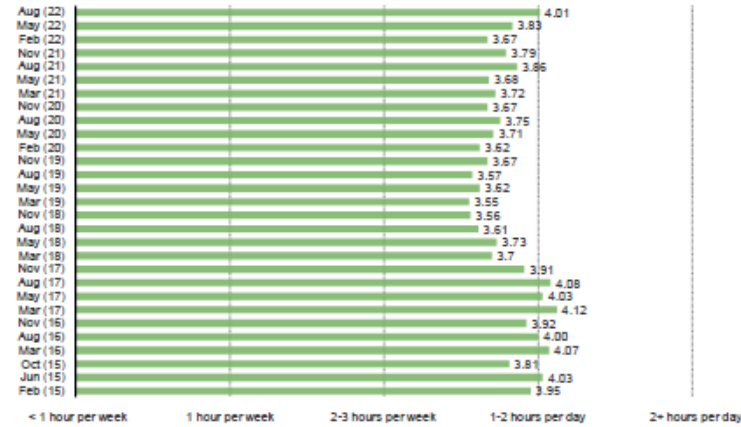
Source: Video Gamers Survey, US

Video Game Playing Dynamics

Video game playing frequency increased sequentially and is shifting to digital...

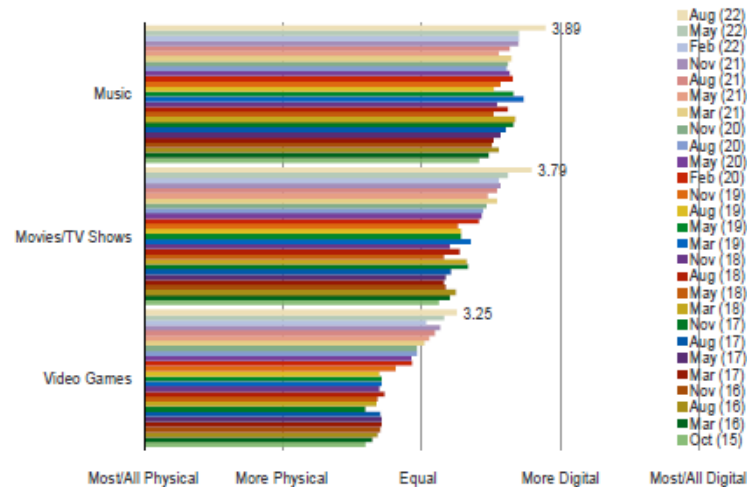
HOW OFTEN DO YOU PLAY VIDEO GAMES?

This question was posed to the target audience.



FOR EACH OF THE FOLLOWING, WHICH BEST DESCRIBES YOUR USAGE?

This question was posed to the target audience.



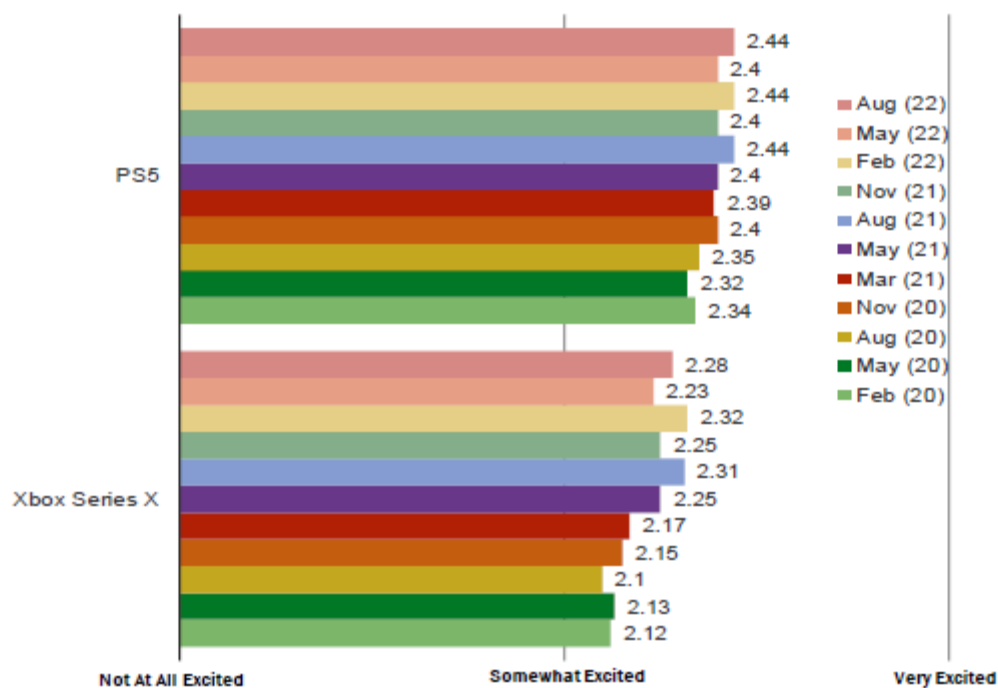
Source: Video Gamers Survey, US

Excitement around PS5 and Xbox Series X Exclusive Lineups

Gamer excitement around exclusive game lineups has increased over time (stronger for PS5)...

PLEASE RATE YOUR LEVEL OF EXCITEMENT FOR THE EXCLUSIVE GAME LINEUP THAT WILL BE AVAILABLE FOR THIS PLATFORM.

This question was posed to the target audience.



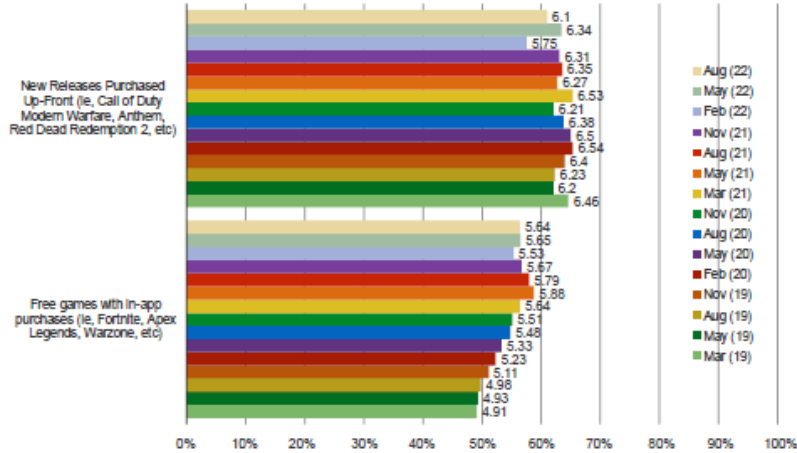
Source: Video Gamers Survey, US

Video Games With In-Game Purchases

Over the history of our survey, an increasing percentage of gamers are spending time (and money) on free games with in-app purchases...

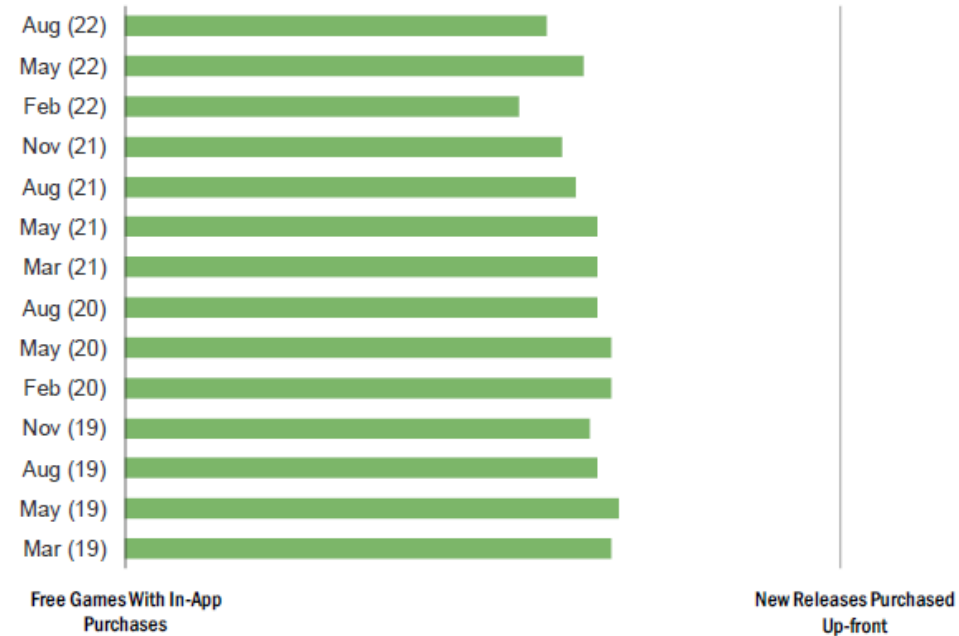
HOW MUCH OF YOUR GAME PLAYING TIME GETS ALLOCATED TO THE FOLLOWING?

Posed to respondents who own a PS4/PS5 or Xbox One/Series X.



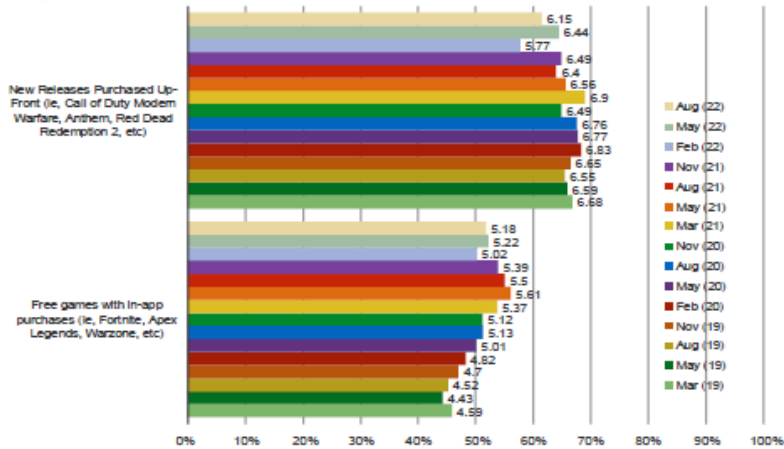
WHICH DO YOU PREFER?

Posed to respondents who own a PS4/PS5 or Xbox One/Series X.



HOW MUCH OF YOUR GAME SPENDING BUDGET GETS ALLOCATED TO THE FOLLOWING?

Posed to respondents who own a PS4/PS5 or Xbox One/Series X.



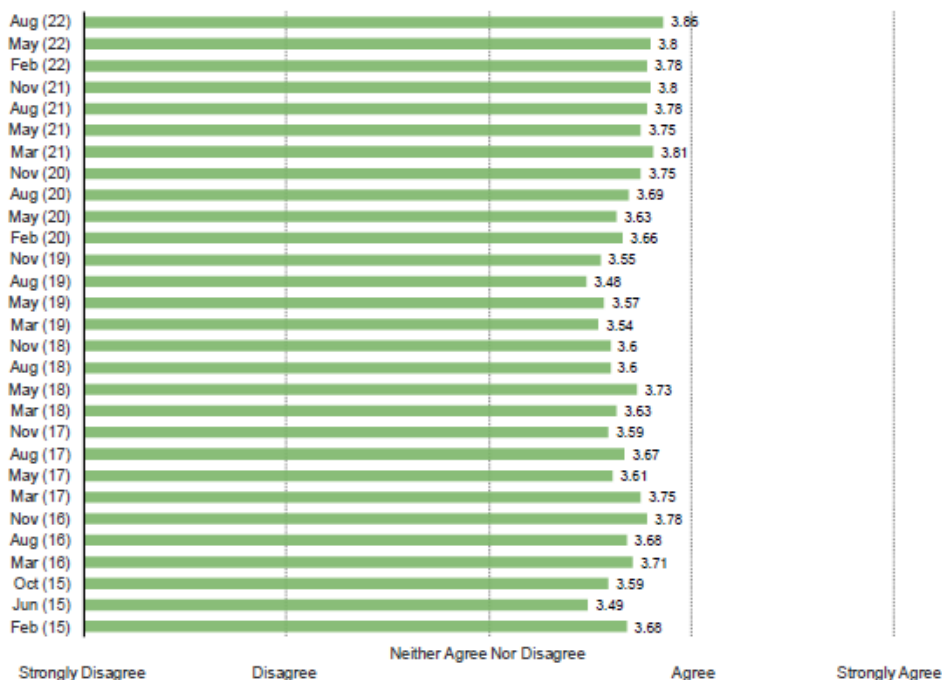
Source: Video Gamers Survey, US

Digital Video Games

More evidence of digital gaining share...

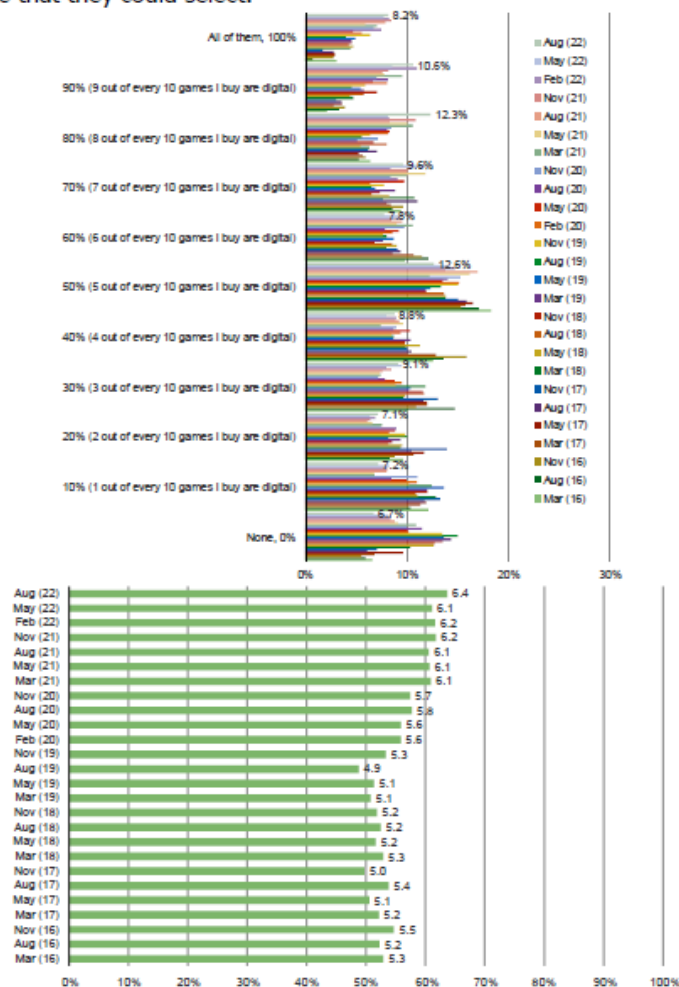
"EVENTUALLY, ALL GAMES WILL BE PURCHASED OR DOWNLOADED DIGITALLY"

This question was posed to the target audience.



WHAT PERCENTAGE OF VIDEO GAMES THAT YOU BUY ARE DIGITAL DOWNLOADS?

This question was posed to the target audience. Each percentage value below was a multiple choice that they could select.



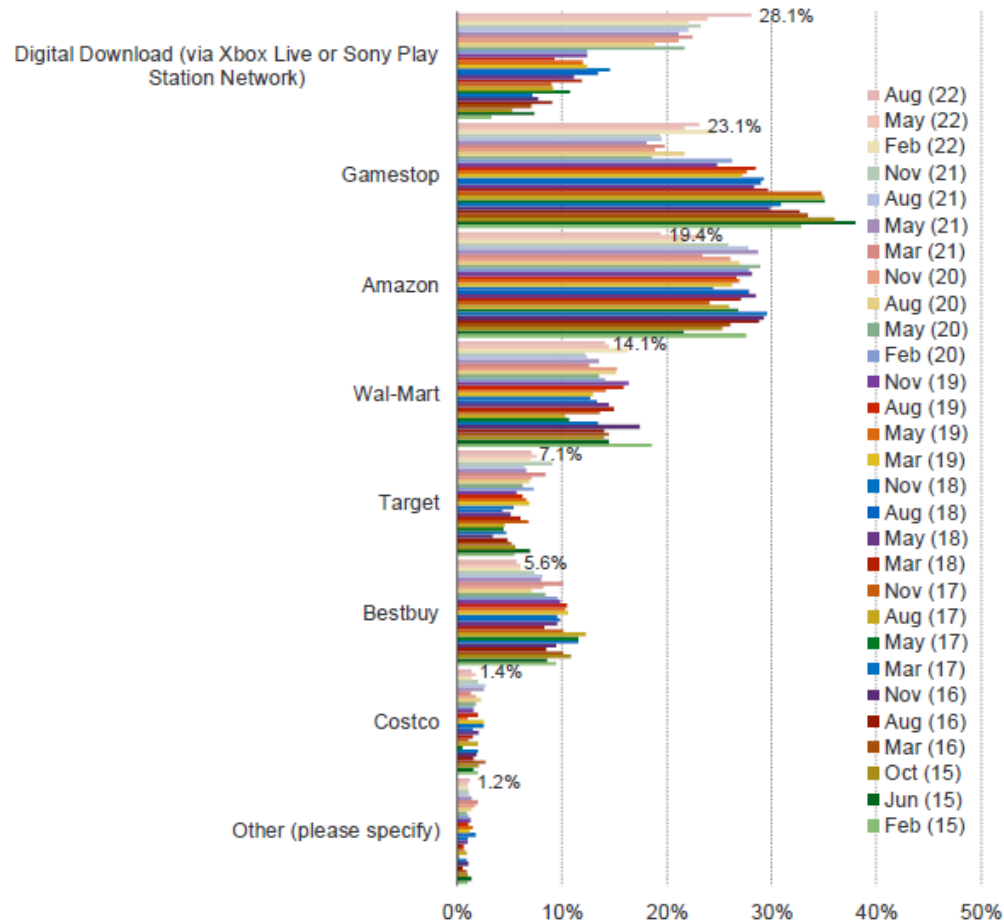
Source: Video Gamers Survey, US

Purchase Preferences if Buying a New Video Game Today

More evidence of digital gaining share...

IF YOU WERE BUYING A BRAND NEW GAME TODAY, WHERE WOULD YOU PURCHASE IT?

This question was posed to the target audience.



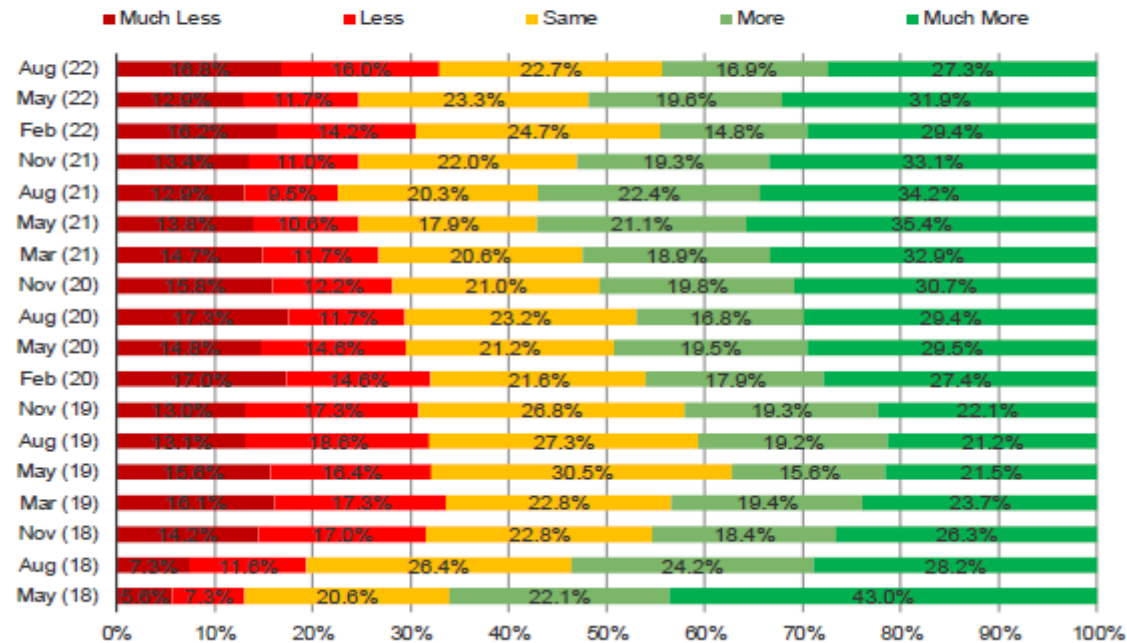
Source: Video Gamers Survey, US

Fortnite Gaming Frequency Changes

Self-reported engagement with Fortnite has fluctuated, taking a step back in 2022 relative to 2021...

ARE YOU PLAYING FORTNITE NOW MORE OR LESS COMPARED TO THE FIRST MONTH AFTER YOU GOT IT?

This question was posed to respondents who have played Fortnite.



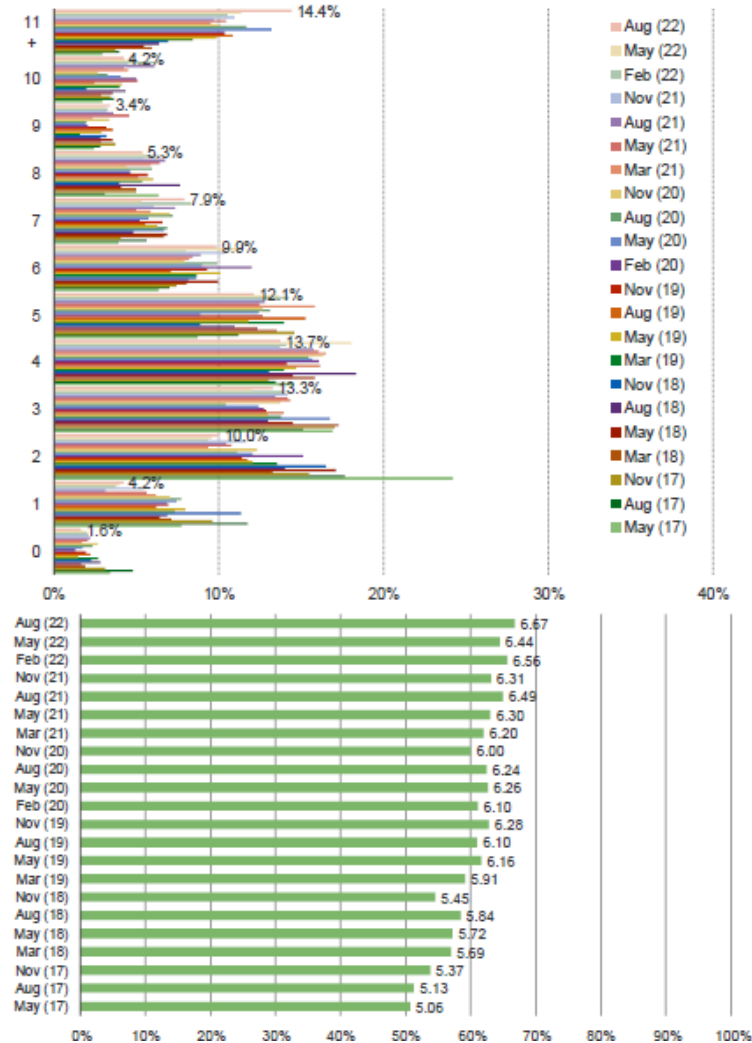
Source: Video Gamers Survey, US

NTDOY Switch Attach Rates

The average number of games purchased per Switch user continues to climb higher...

HOW MANY GAMES HAVE YOU PURCHASED SO FAR FOR THE SWITCH?

This question was posed to the target audience that owns a Nintendo Switch



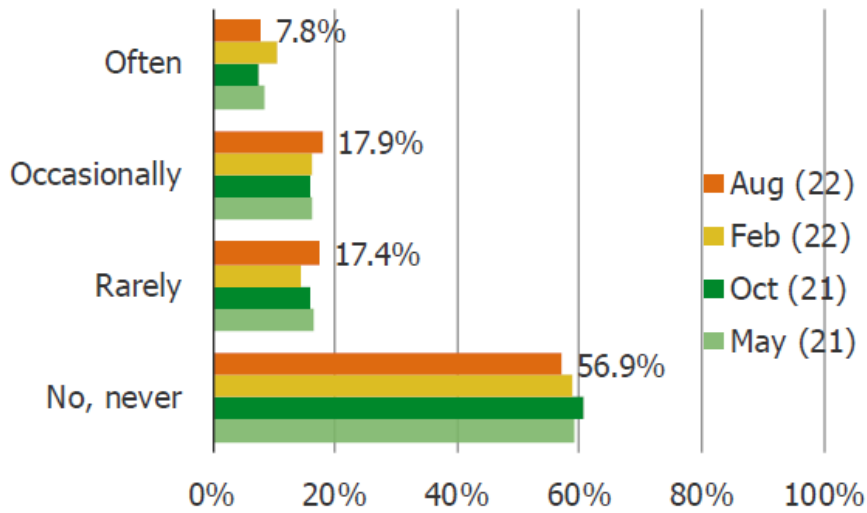
Source: Video Gamers Survey, US

Sports Gambling Participation

The percentage of consumers who gamble on sports has increased a bit over the past year...

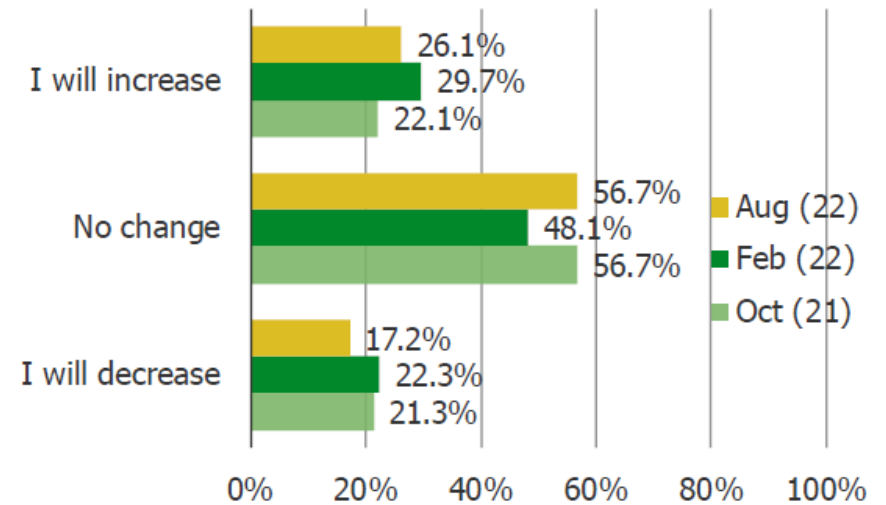
DO YOU EVER GAMBLE ON SPORTS?

Posed to all respondents.



GOING FORWARD, DO YOU EXPECT THAT YOU WILL INCREASE OR DECREASE HOW OFTEN YOU GAMBLE ON SPORTS?

Posed to all respondents who gamble on sports more often than never.



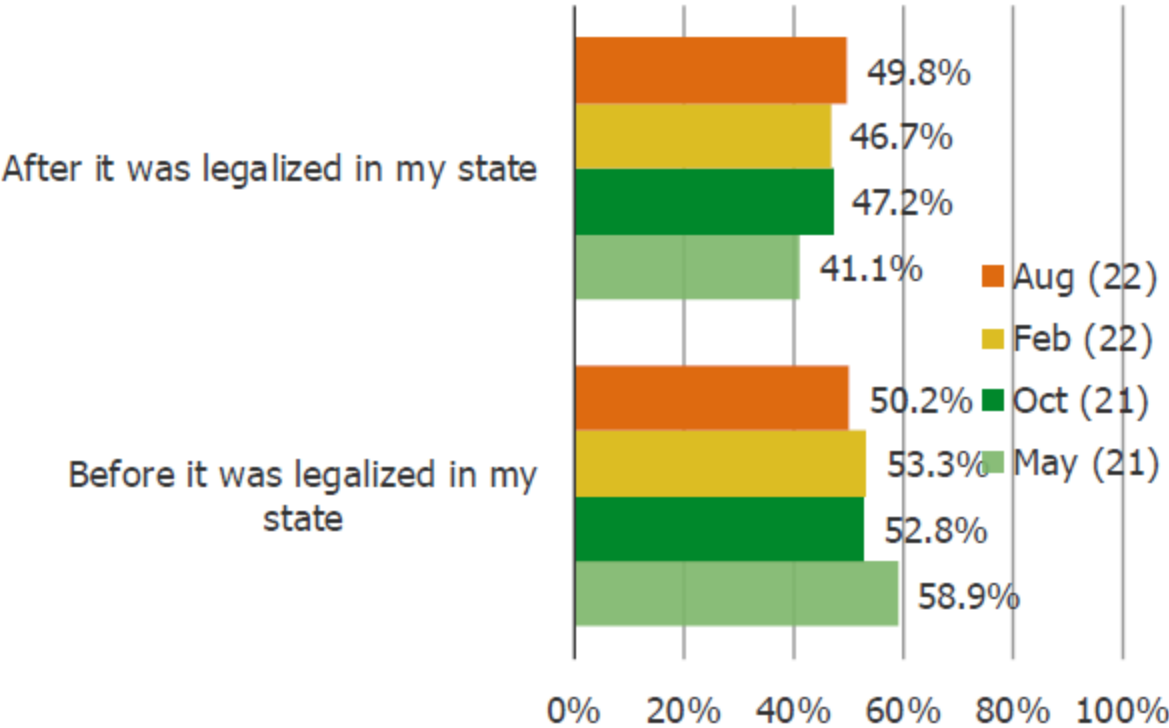
Source: Sports Gambling Survey, US

Sports Gambling Pre or Post Legalization

An increasing percentage of sports gamblers say they started after it was legalized in their state...

WHEN DID YOU START GAMBLING ON SPORTS?

Posed to all respondents who gamble on sports more often than never.



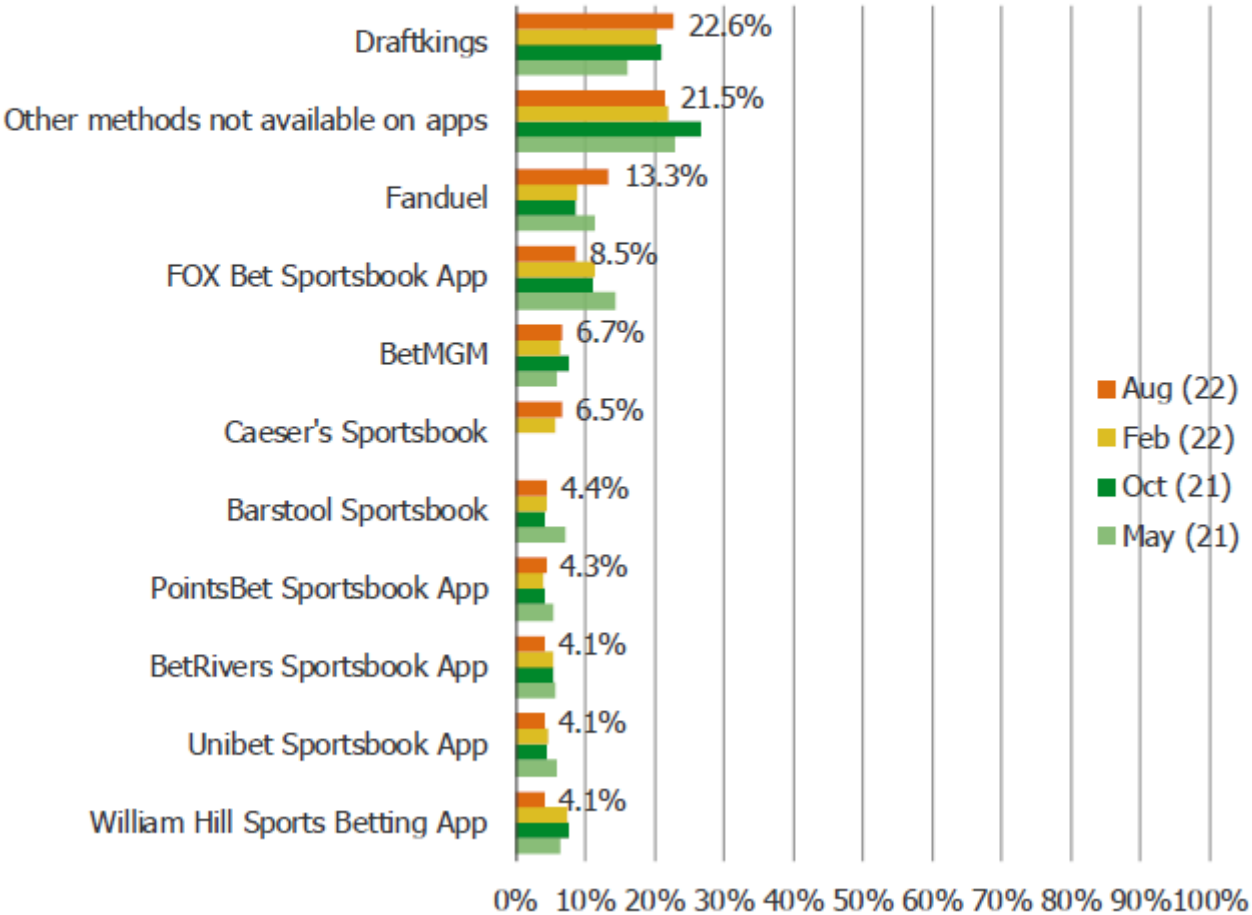
Source: Sports Gambling Survey, US

Sports Gambling Platform Preference

Among the broader audience of sports gamblers, Draftkings is preferred by a plurality...

WHICH IS YOUR PREFERENCE FOR GAMBLING ON SPORTS?

Posed to all respondents who gamble on sports more often than never.



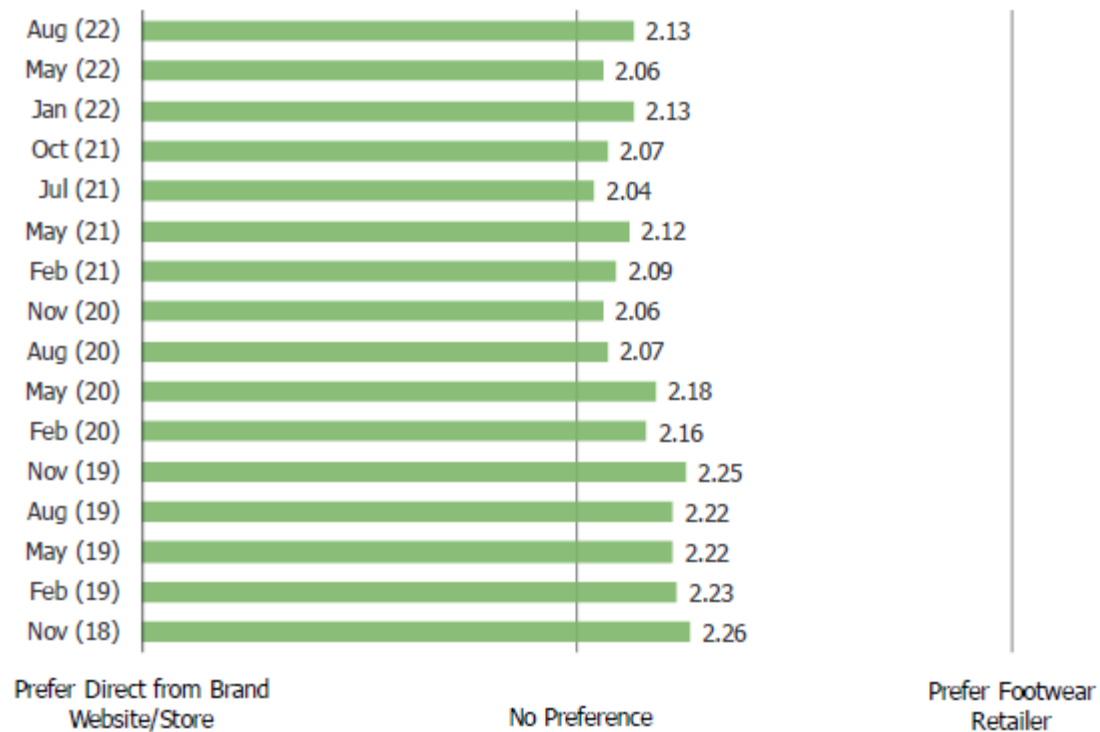
Source: Sports Gambling Survey, US

Footwear Purchase Preferences | Retailer vs. Direct

Though the trend has moderated recently, consumer preferences have been shifting from retailers to buying footwear directly from the brand...

WHERE DO YOU PREFER TO BUY SNEAKERS/FOOTWEAR?

Posed to all respondents



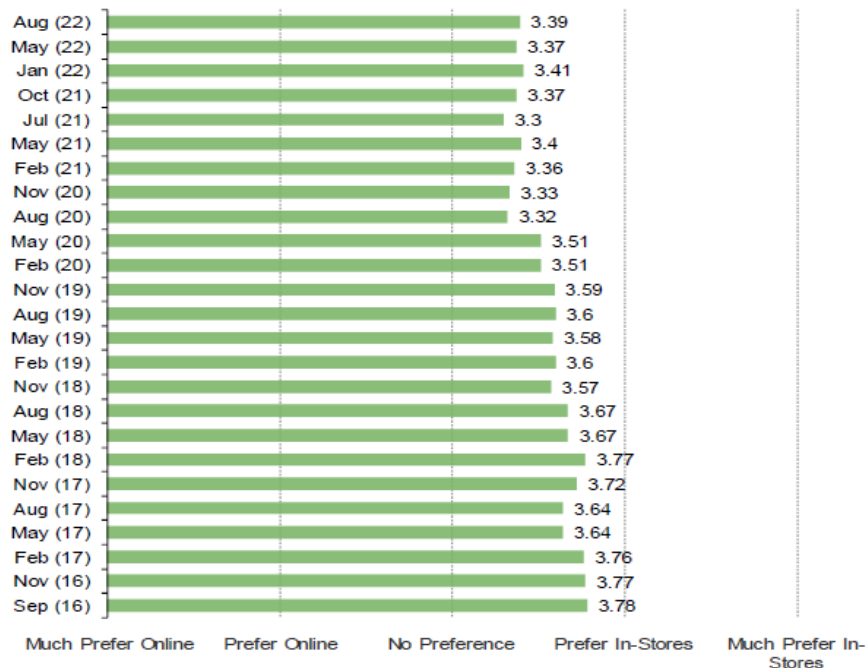
Source: Footwear Survey, US

Footwear Purchase Preferences | In-Store vs. Online

Though the trend has moderated recently, over time consumer preferences have been shifting from in-store to buying footwear online...

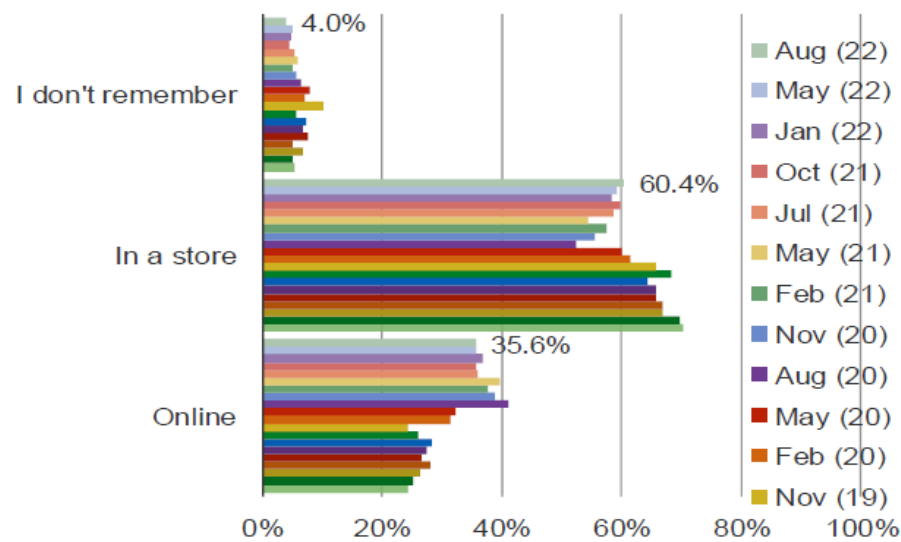
WHERE DO YOU PREFER TO BUY SNEAKERS?

Posed to all respondents



THINKING OF THE LAST TIME YOU BOUGHT A PAIR OF SNEAKERS, DID YOU BUY THEM ONLINE OR IN A STORE?

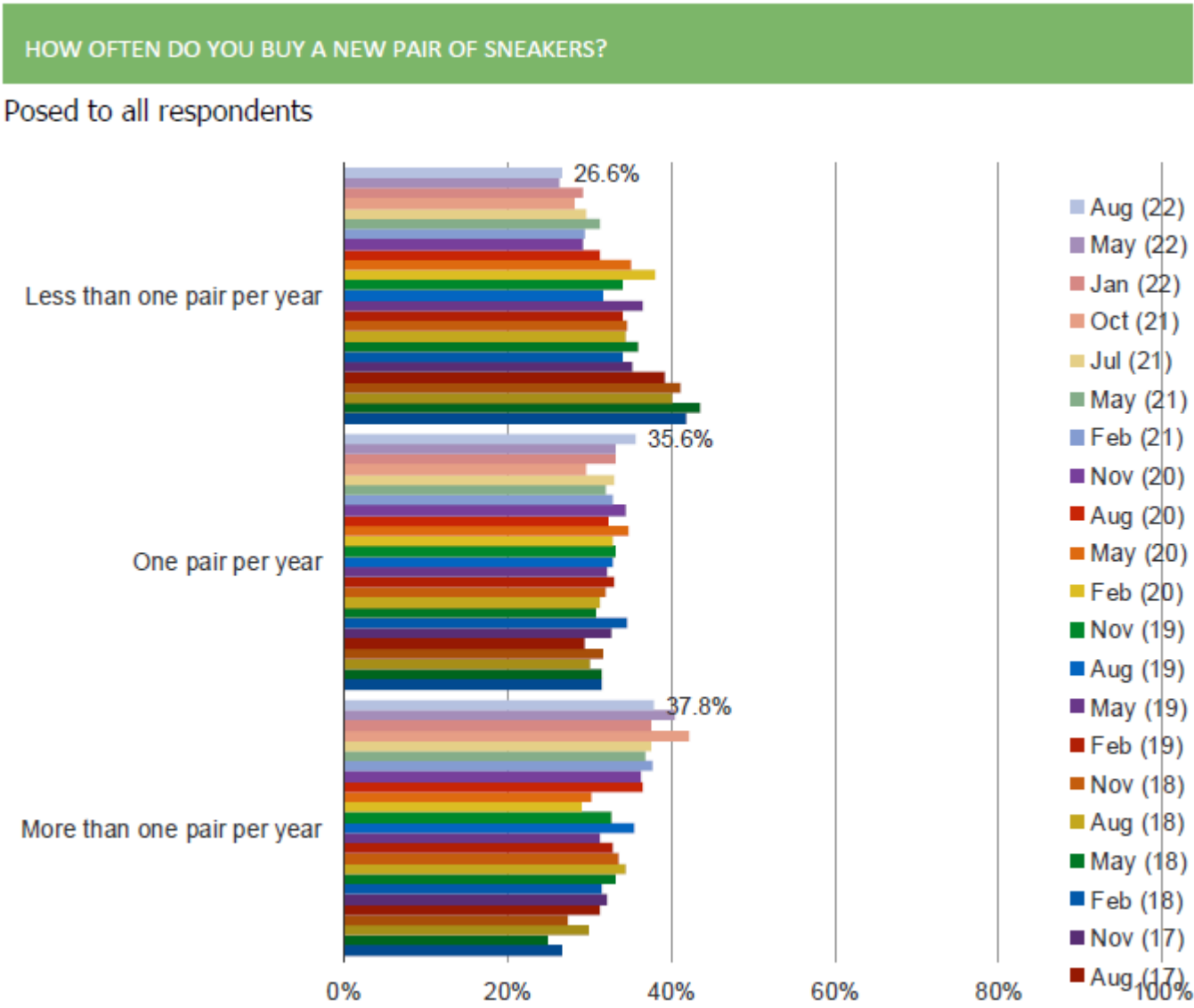
Posed to all respondents



Source: Footwear Survey, US

Footwear Purchase Frequency

Consumers have been increasing the number of sneakers they buy per year, on average...



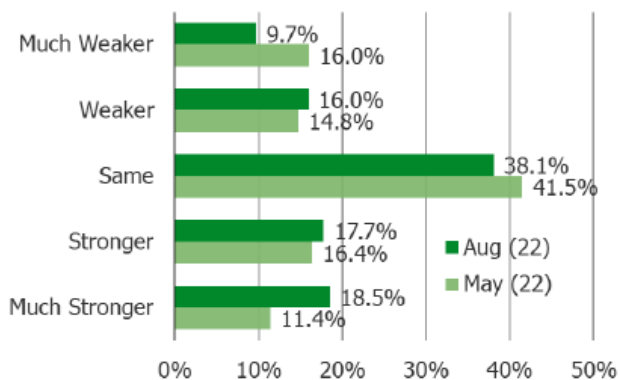
Source: Footwear Survey, US

Luxury Furniture Demand

Luxury furniture demand among respondents with HHI above \$100k weakened q/q in August with the main reason for weakening demand being inflation / the economy...

WOULD YOU SAY YOUR INTEREST IN BUYING LUXURY FURNITURE THIS YEAR IS STRONGER/WEAKER THAN WHAT IT TYPICALLY WOULD BE?

Posed to all respondents

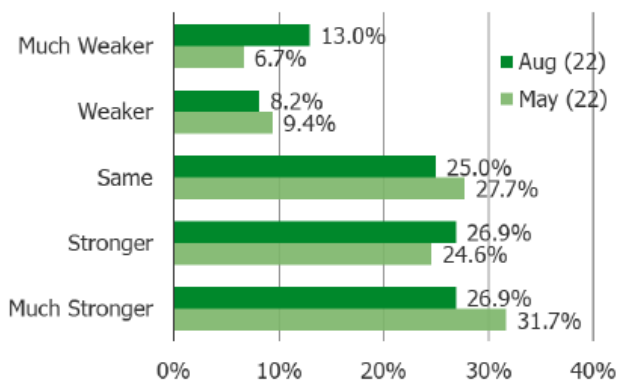


RESPONDENTS WHO SAY THEIR INTEREST IN BUYING LUXURY FURNITURE IS WEAKER THAN NORMAL – WHY?

Posed to respondents who said their interest in luxury furniture is weaker than normal.



Posed to respondents with household incomes of \$100k and above (N = 224)



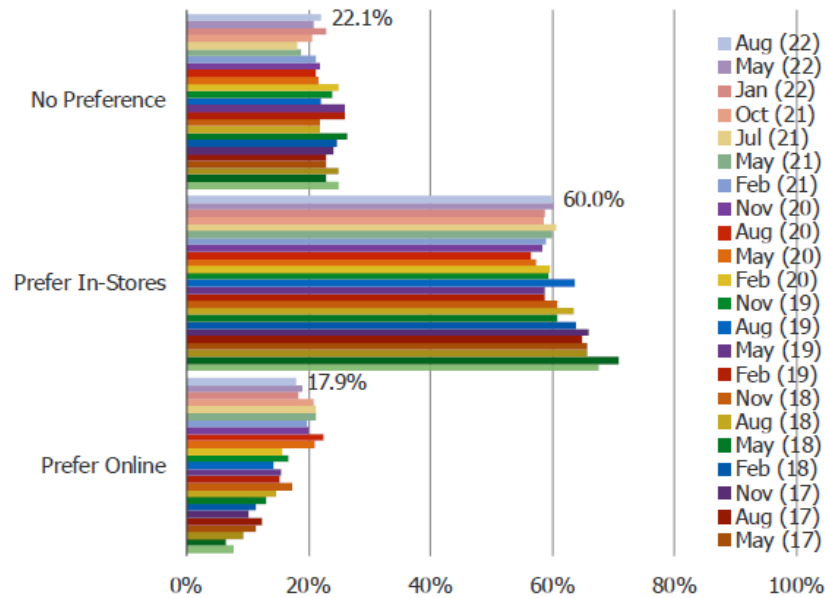
Source: Mattresses and Furniture Survey, US

Furniture Purchasing Preferences | In-Stores vs. Online

Furniture purchase preferences have shifted toward online over time with a notable jump higher during the pandemic. However, that trend has regressed in recent quarters...

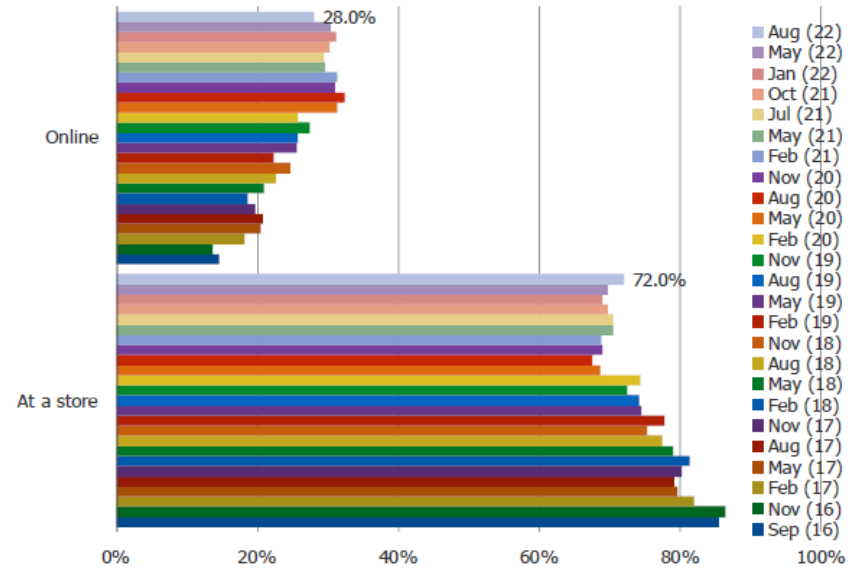
DO YOU PREFER TO BUY FURNITURE IN-STORES OR ONLINE?

Posed to all respondents



WHEN IT IS TIME TO GET A NEW MATTRESS, DO YOU THINK YOU WILL BUY IT AT A STORE OR ONLINE?

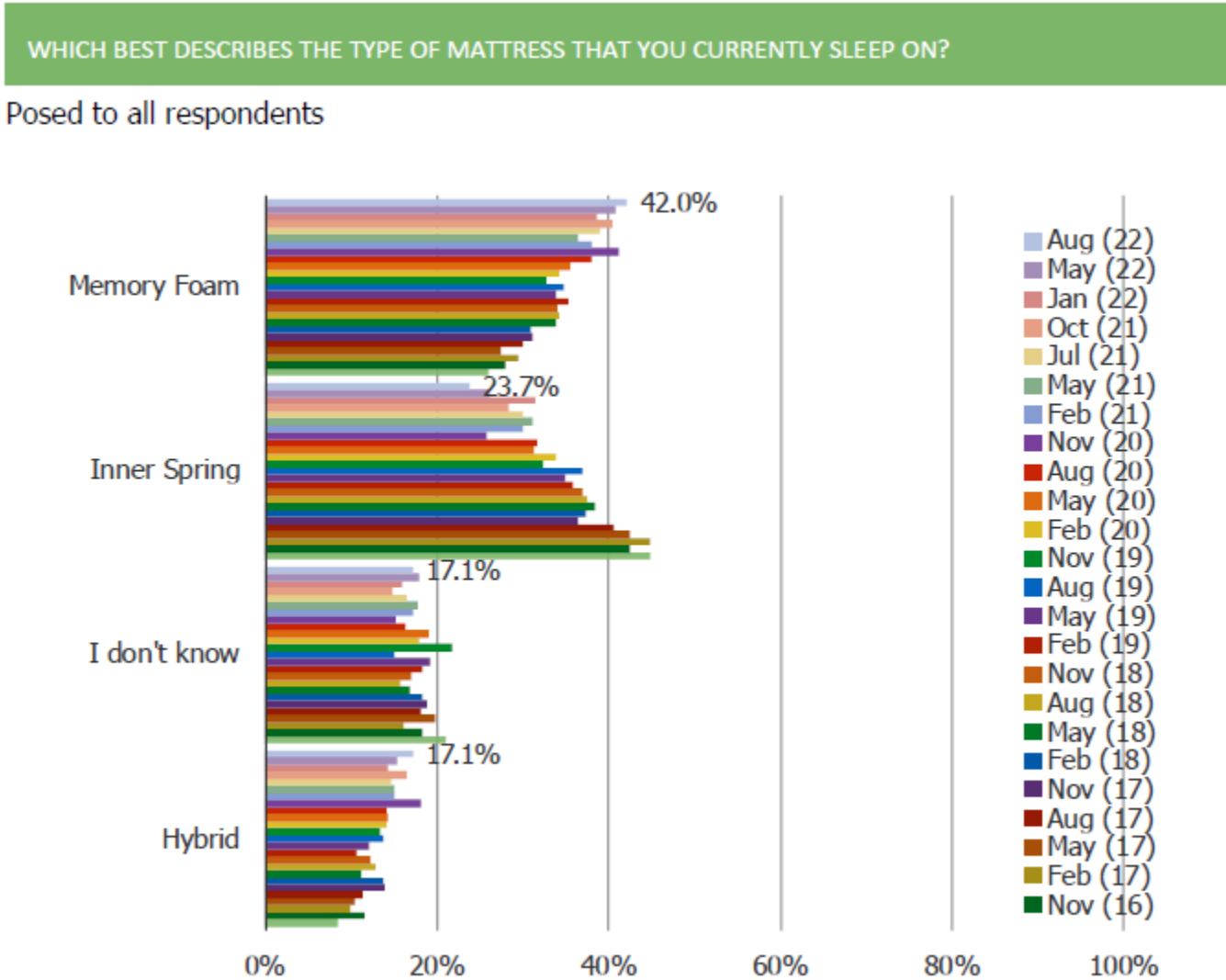
Posed to all respondents



Source: Mattresses and Furniture Survey, US

Mattresses | Memory Foam vs. Inner-Spring

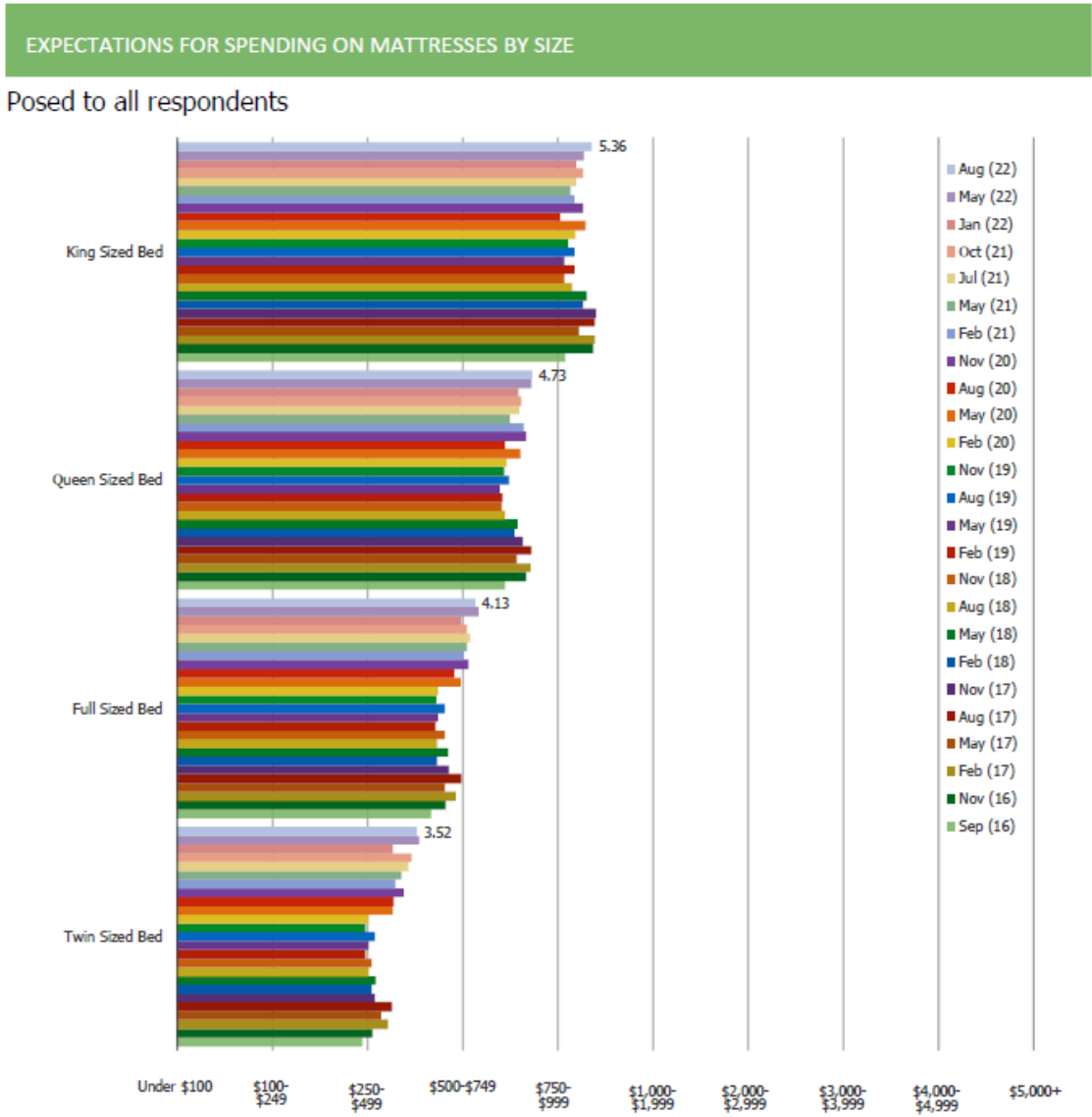
Consumers are shifting from inner-spring to memory foam...



Source: Mattresses and Furniture Survey, US

Mattresses | Price Expectations

Consumers continue to revise higher the price they would expect to spend on mattresses...



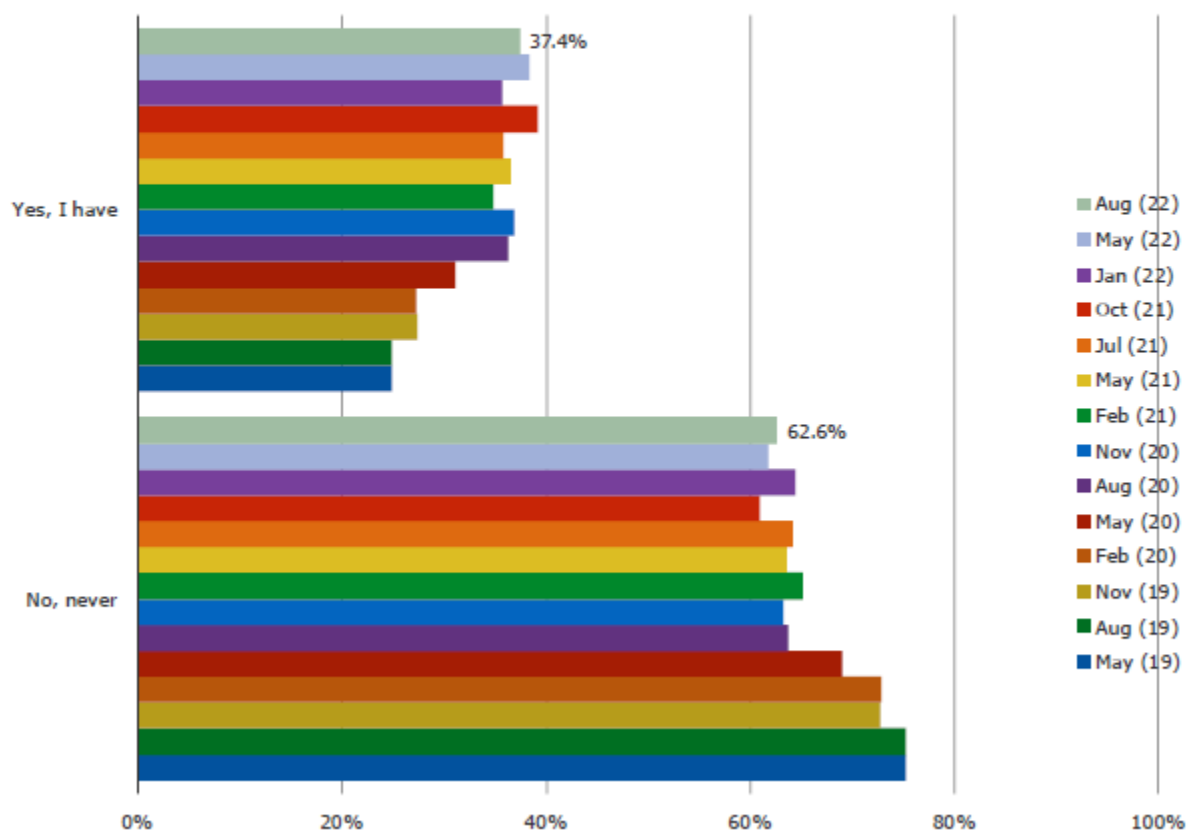
Source: Mattresses and Furniture Survey, US

Mattresses | Bed-in-a-Box

An increasing percentage of consumers have ordered a mattress online...

HAVE YOU EVER ORDERED A MATTRESS ONLINE? (IE. A BED-IN-A-BOX MATTRESS)

Posed to all respondents



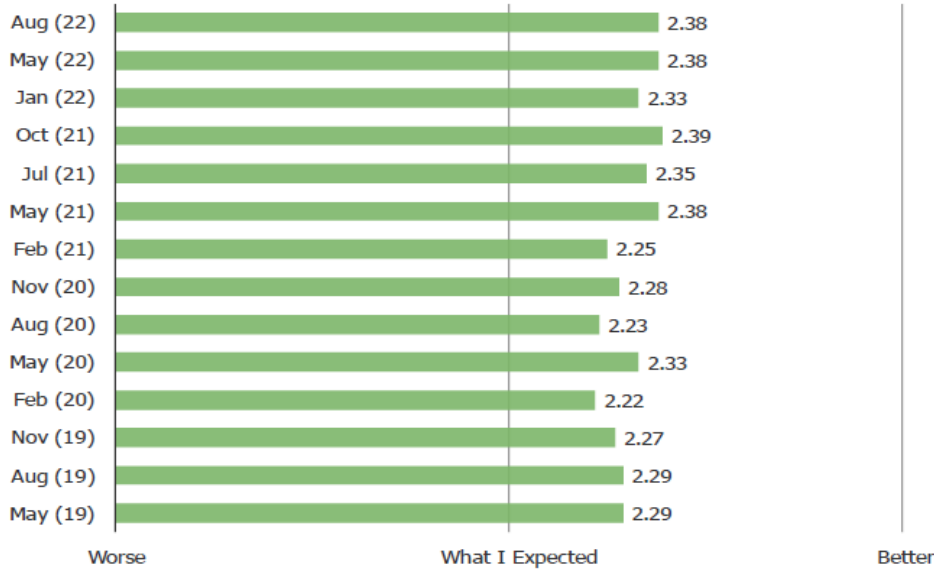
Source: Mattresses and Furniture Survey, US

Mattresses | Bed-in-a-Box vs. Expectations

Bed-in-a-Box type mattresses are consistently over-delivering relative to expectations...

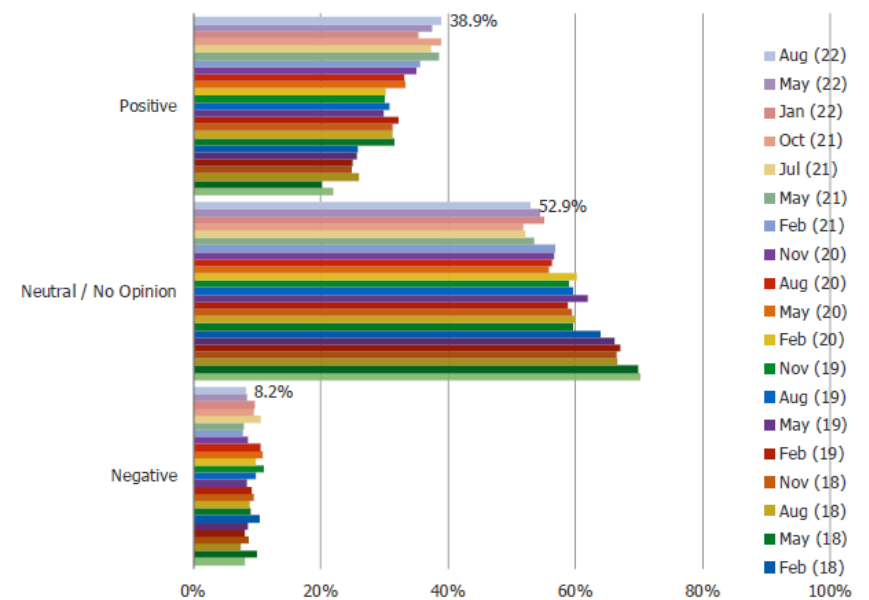
HOW IS THE MATTRESS HOLDING UP OVER TIME COMPARED TO YOUR EXPECTATIONS?

Posed to respondents who have ordered a mattress online



OPINION OF BED IN A BOX MATTRESS PROVIDERS WHO SHIP MATTRESSES TO CUSTOMERS IN A VACUUM SEALED BOX

Posed to all respondents



Source: Mattresses and Furniture Survey, US

Mattresses | Purchase Factors

Convenience is increasingly factoring into the mattress decision making process...

FROM PREVIOUS PAGE, WHY DID YOU SELECT THAT BRAND?

Posed to all respondents



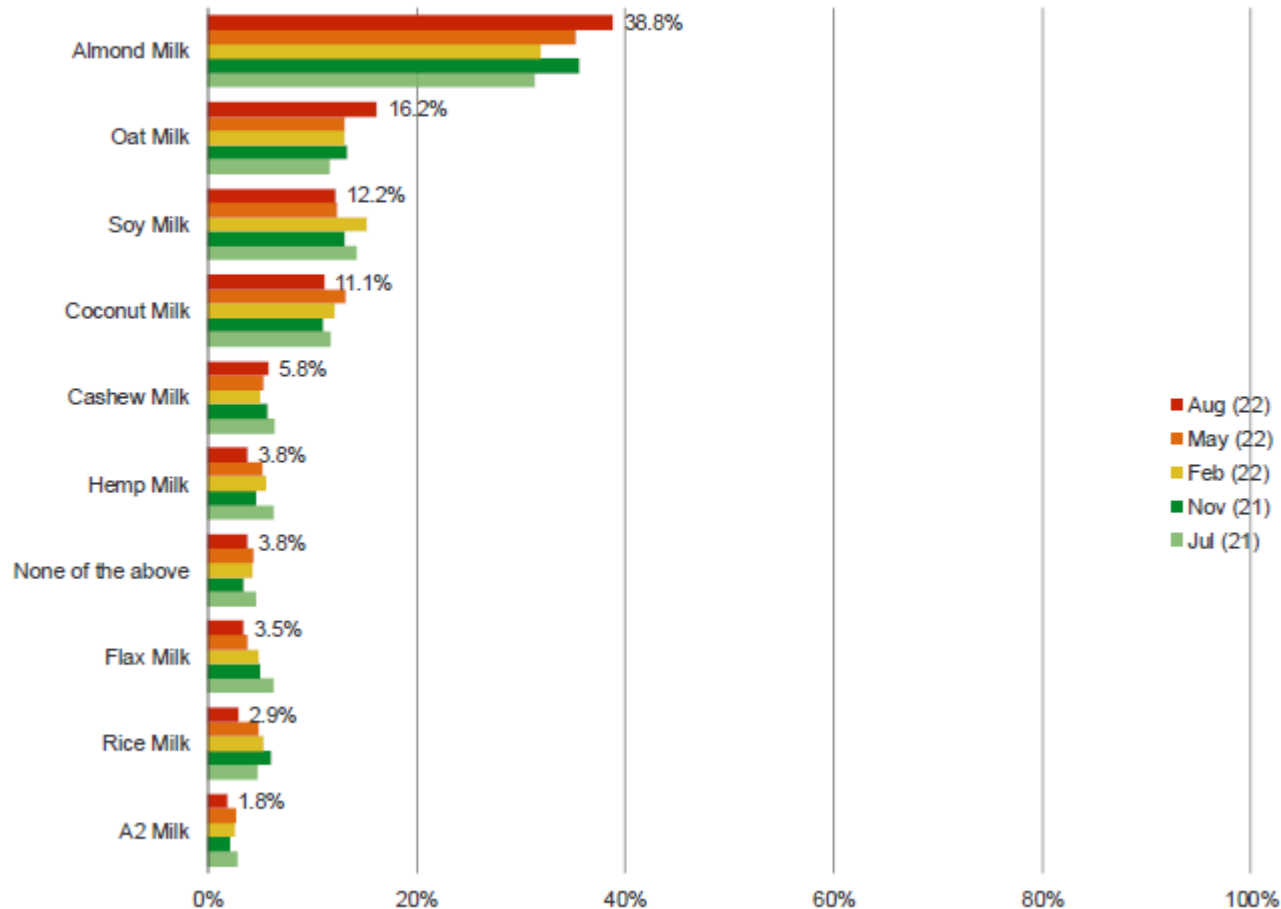
Source: Mattresses and Furniture Survey, US

Milk Alternative That Consumers Feel Is Healthiest

An increasing percentage of alternative milk user feel Almond milk is the healthiest. Oat milk also gained q/q...

WHICH ALTERNATIVE MILK TYPE DO YOU FEEL IS THE HEALTHIEST?

Posed to all respondents who use milk alternatives regularly or occasionally.



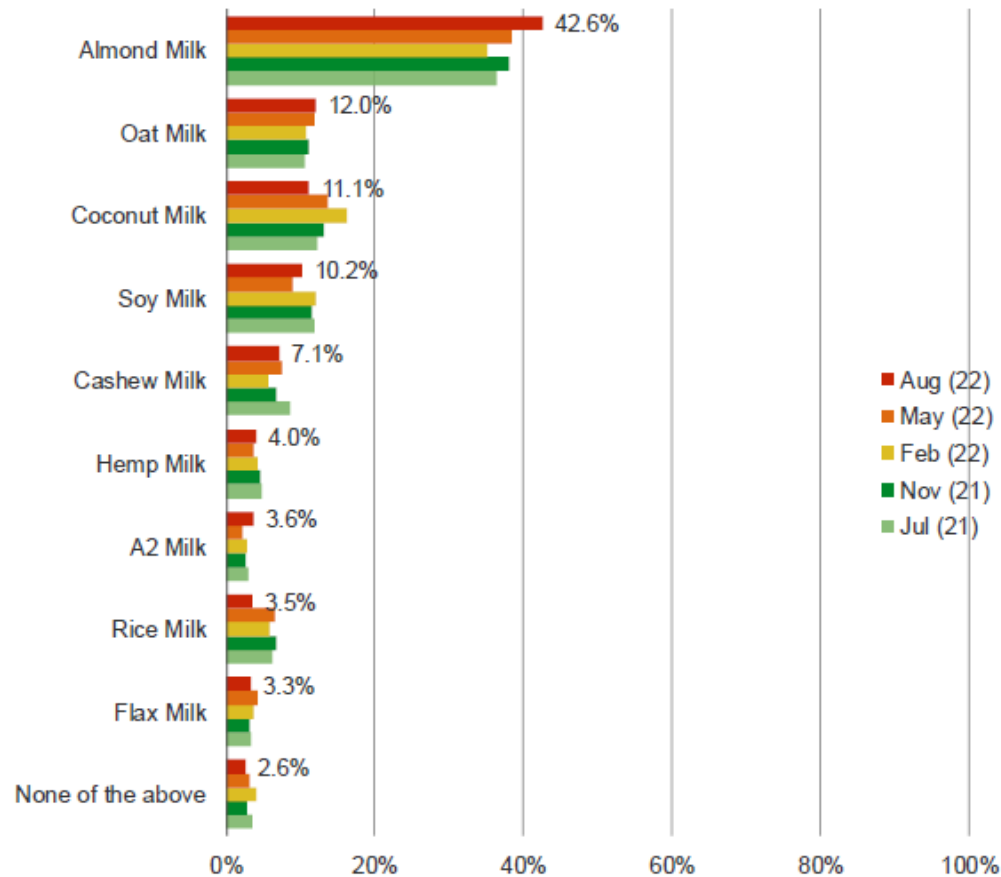
Source: Milk Alternatives Survey, US

Milk Alternative That Consumers Feel Tastes Best

An increasing percentage of alternative milk user feel Almond milk tastes the best. Oat milk also gained q/q...

WHICH ALTERNATIVE MILK TYPE DO YOU FEEL IS THE TASTES THE BEST?

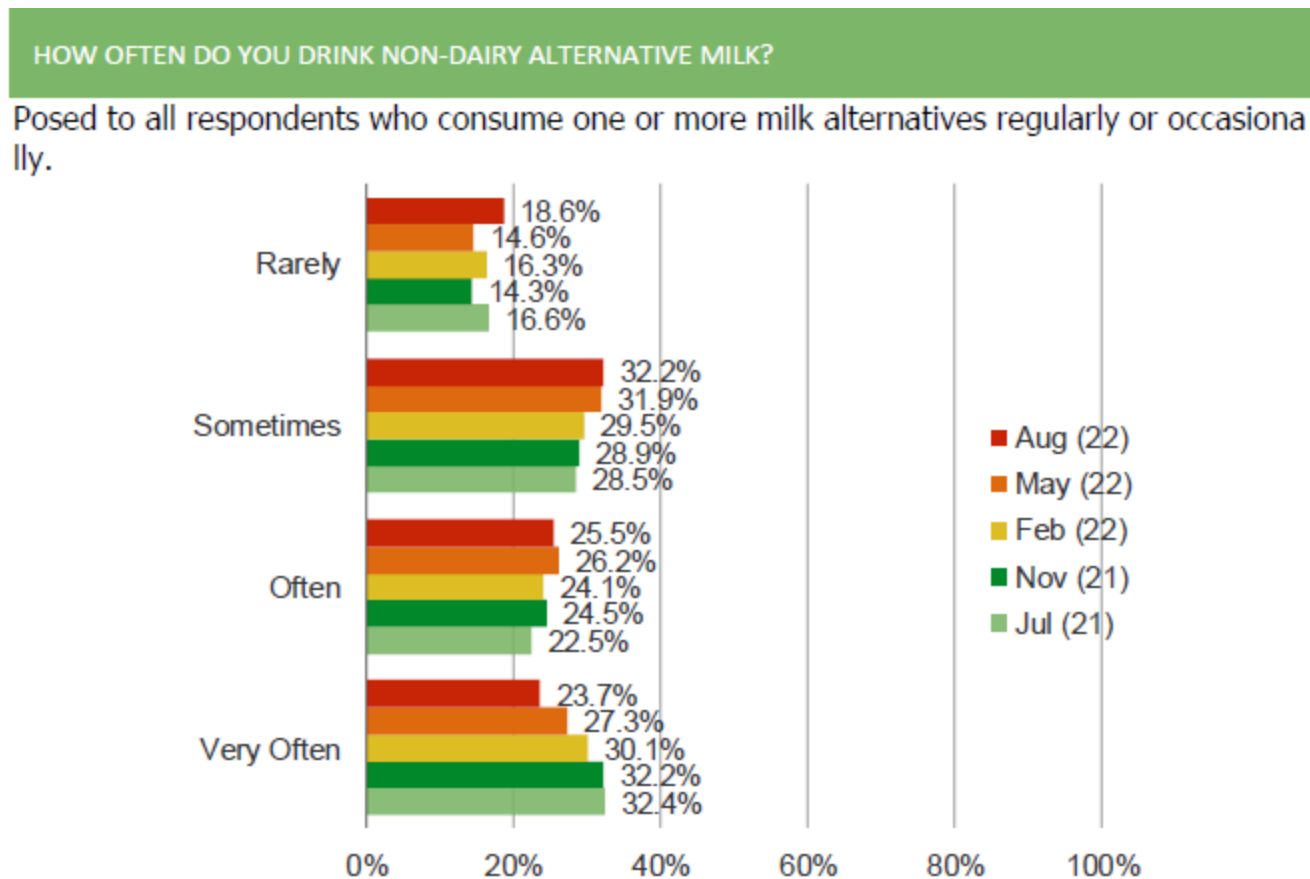
Posed to all respondents who use milk alternatives regularly or occasionally.



Source: Milk Alternatives Survey, US

Milk Alternatives Engagement

Among those who consume milk alternatives, consumption patterns have softened sequentially...



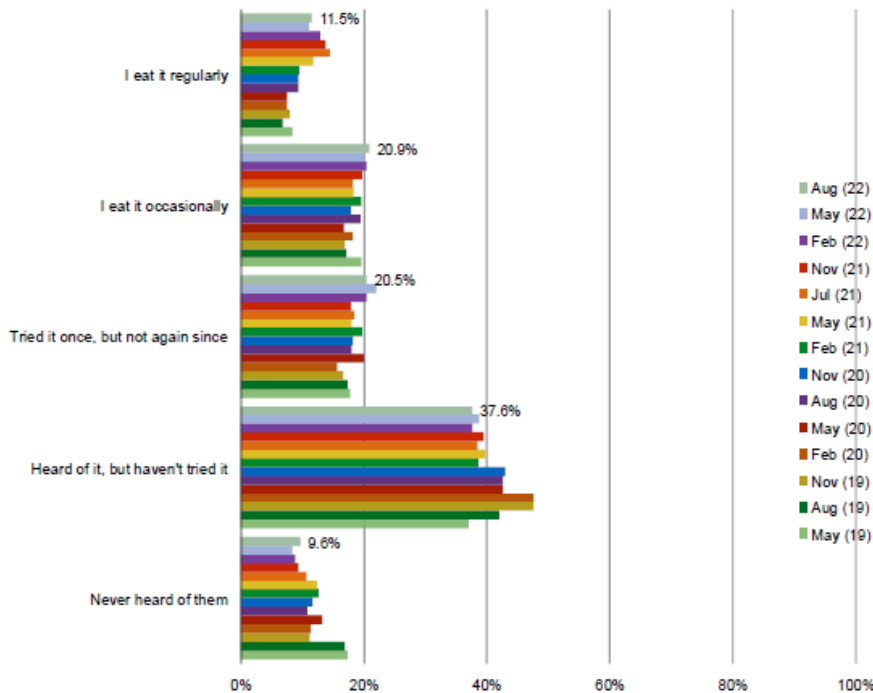
Source: Milk Alternatives Survey, US

Meat Alternatives Engagement

Meat alternatives consumption has softened in recent quarters relative to prior readings...

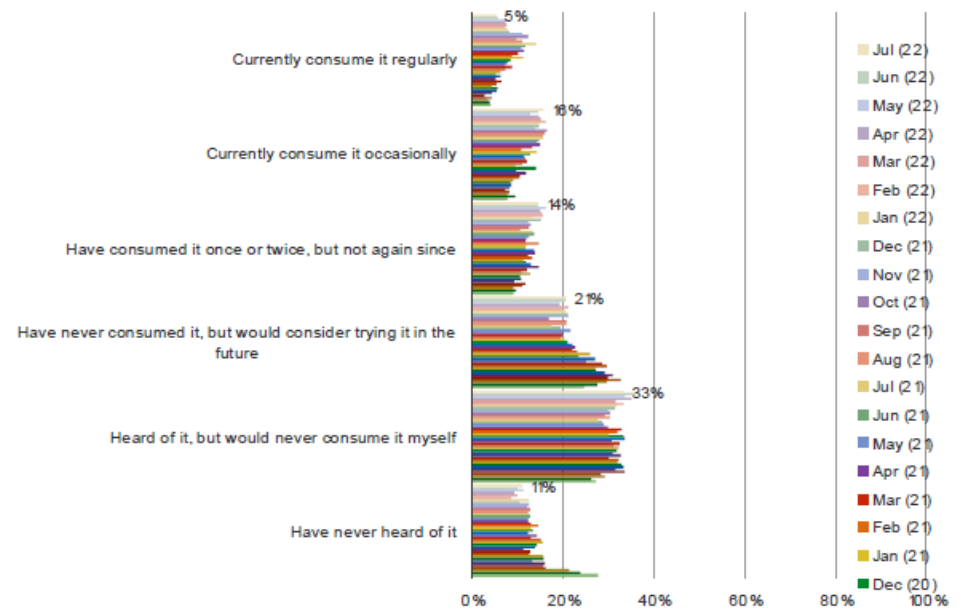
WHAT IS YOUR EXPERIENCE WITH PLANT BASED MEAT SUBSTITUTES (IE. BURGERS THAT ARE MADE WITH PLANT PROTEIN AND DON'T CONTAIN ANY BEEF). **QUARTERLY SURVEY FEEDBACK**

Posed to all respondents



WHICH OF THE FOLLOWING BEST DESCRIBES YOUR POSITION TOWARD PLANT BASED MEAT SUBSTITUTES (IE, BEYOND MEAT BURGER, IMPOSSIBLE BURGER, ETC)? **MONTHLY SURVEY FEEDBACK**

Posed to all respondents



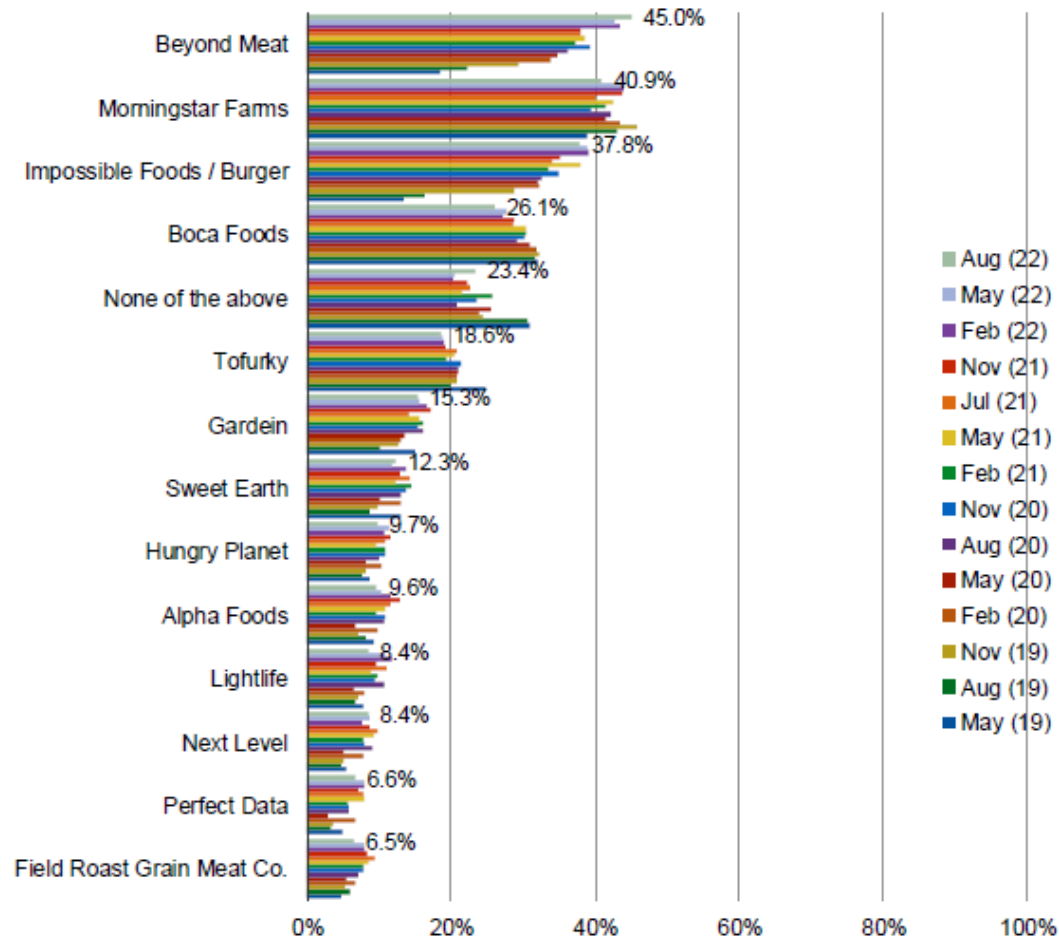
Source: Meat Alternatives Survey, US

Meat Alternatives Awareness

Awareness of Beyond Meat and Impossible Foods has increased over time...

HAVE YOU HEARD OF ANY OF THE FOLLOWING BRANDS? (SELECT ALL THAT APPLY)

Posed to all respondents



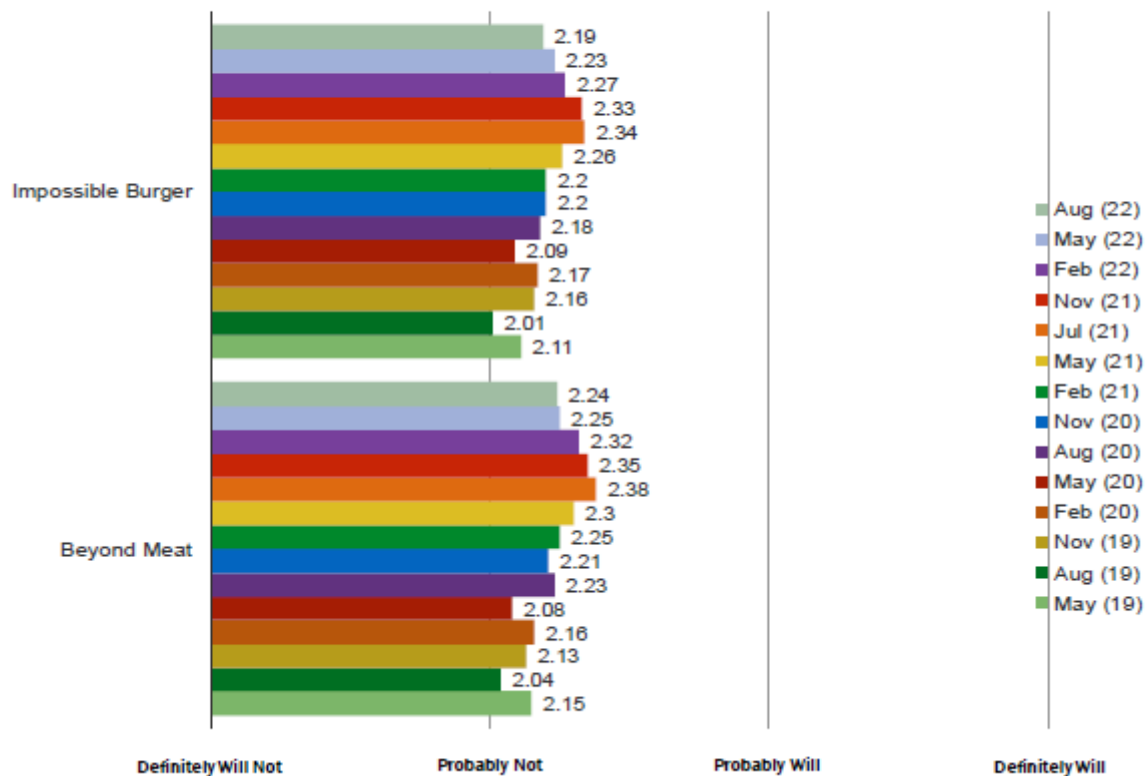
Source: Meat Alternatives Survey, US

Meat Alternatives Projected Engagement

Consumer expectations around how often they will eat meat alternatives going forward has pulled back from series highs...

HOW LIKELY ARE YOU TO EAT FOOD FROM THIS BRAND IN THE NEXT MONTH?

Posed to all respondents



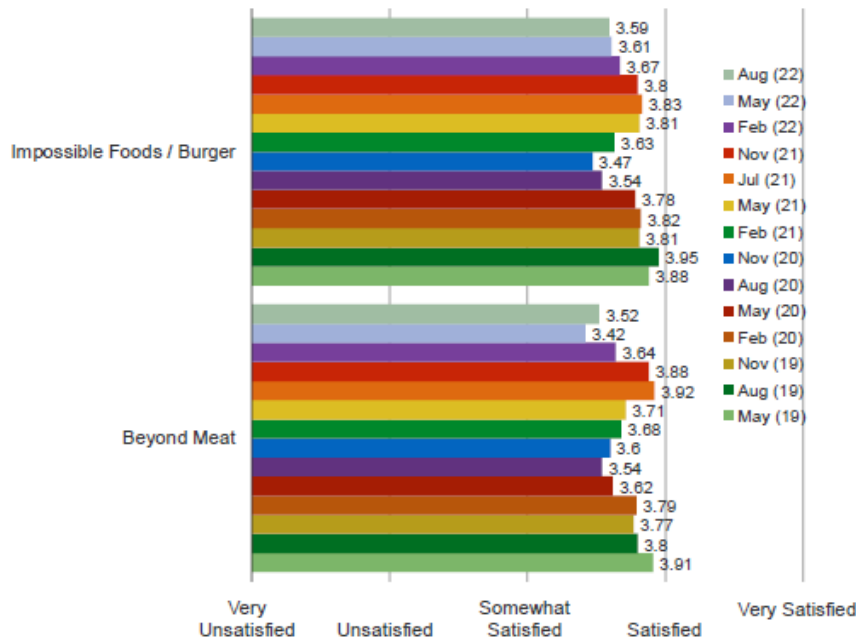
Source: Meat Alternatives Survey, US

Meat Alternatives Satisfaction

Satisfaction with Beyond and Impossible among people who have tried it has softened in recent quarters...

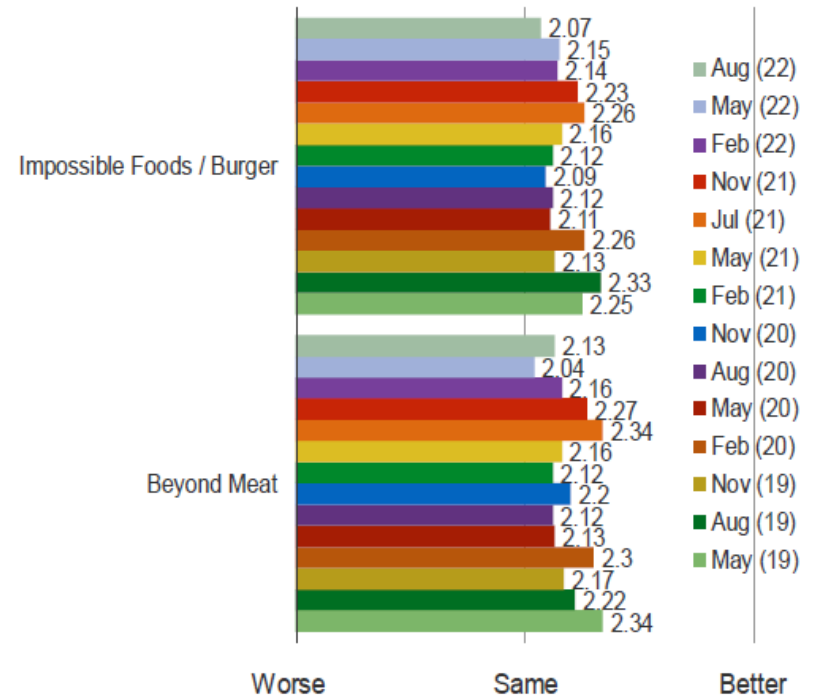
HOW SATISFIED WERE YOU WITH THE PRODUCT?

Posed to respondents who have tried food from each of the following.



IN YOUR OPINION, DOES IT TASTE BETTER OR WORSE THAN A BEEF BURGER?

Posed to respondents who have tried food from each of the following.



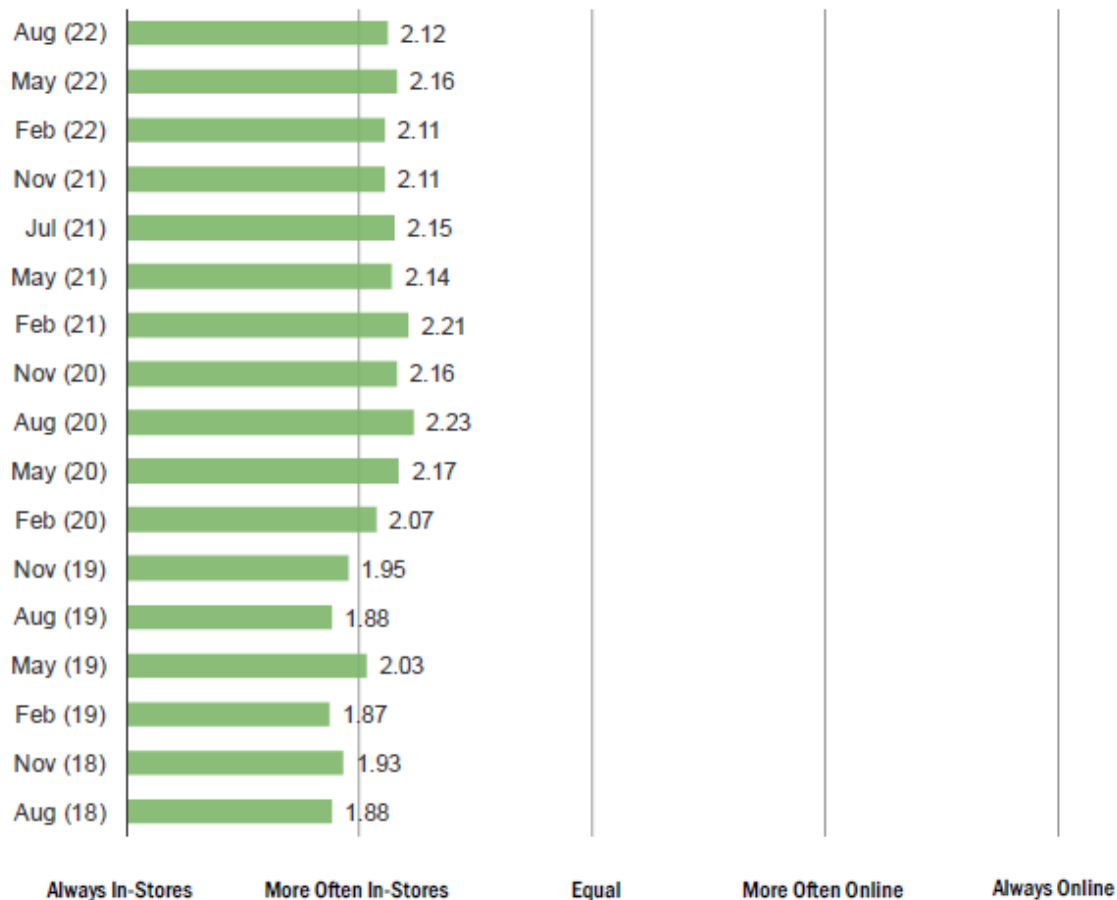
Source: Meat Alternatives Survey, US

CPGs | In-Store vs. Online

Though online has gained a bit, CPGs and personal care items remain firmly in the in-store purview for most consumers...

WHERE DO YOU BUY HOUSEHOLD AND PERSONAL CARE ITEMS?

Posed to all respondents



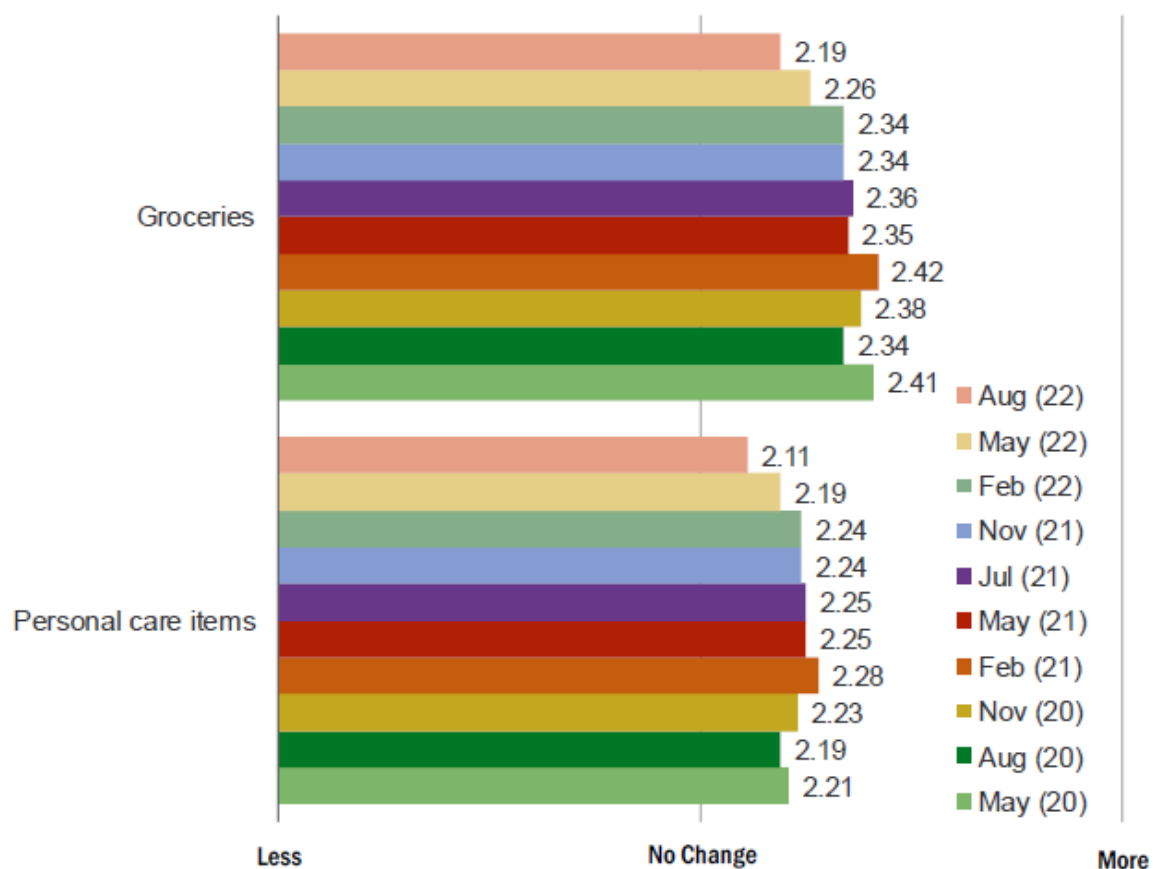
Source: CPGs and Personal Care Products Survey, US

CPGs | Household Inventory

Consumers are pulling back considerably on the pandemic trend of keeping excess household item inventory on-hand...

WHEN IT COMES TO BOTH PERSONAL CARE ITEMS AND GROCERIES, ARE YOU KEEPING MORE OR LESS INVENTORY IN YOUR HOME LATELY?

Posed to all respondents



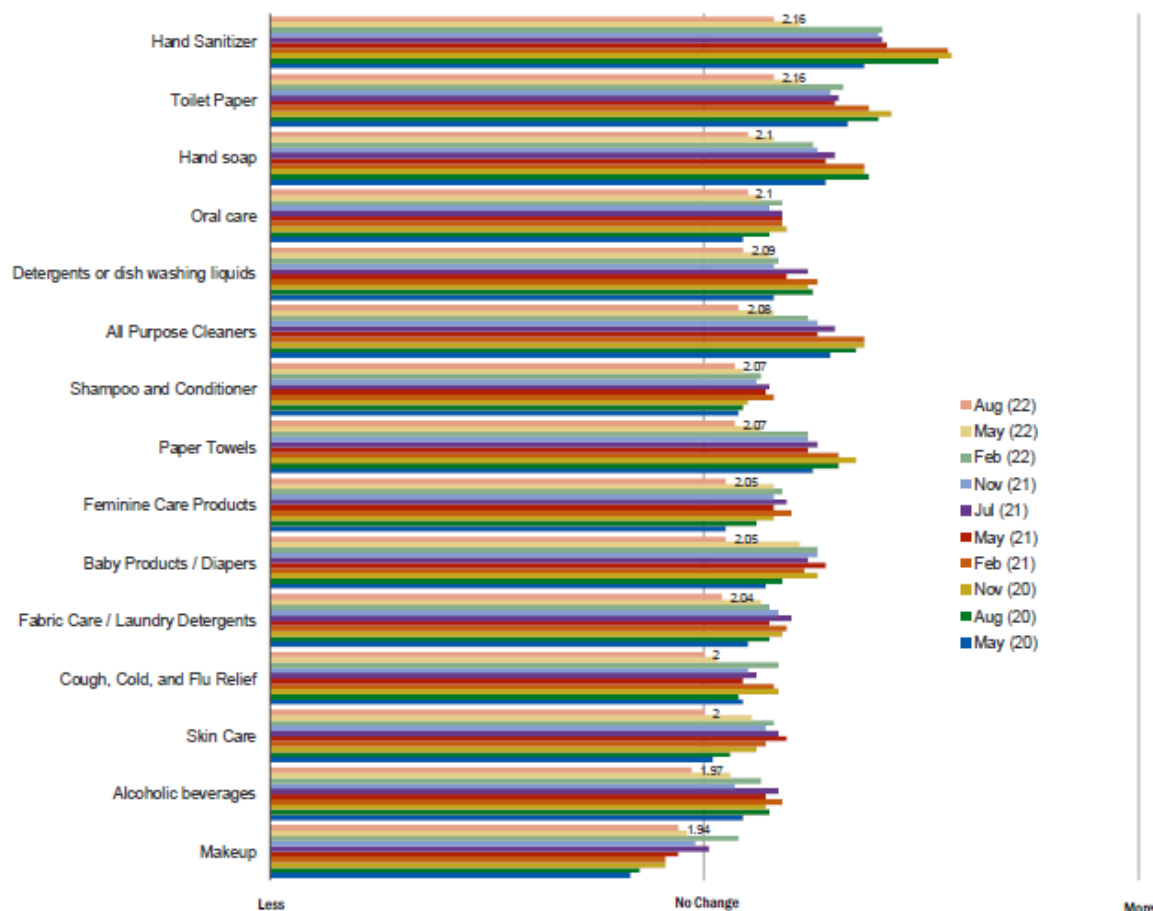
Source: CPGs and Personal Care Products Survey, US

CPGs | Spending Changes By Category

Consumers reported significant increases in spending on a number of household items during the pandemic. Survey data has regressed back closer to “no change” for most items in August...

HAVE YOU RECENTLY CHANGED YOUR SPENDING ON THE FOLLOWING ITEMS YOU TYPICALLY SHOP FOR?

Posed to respondents who regularly or occasionally make purchase decisions on each.



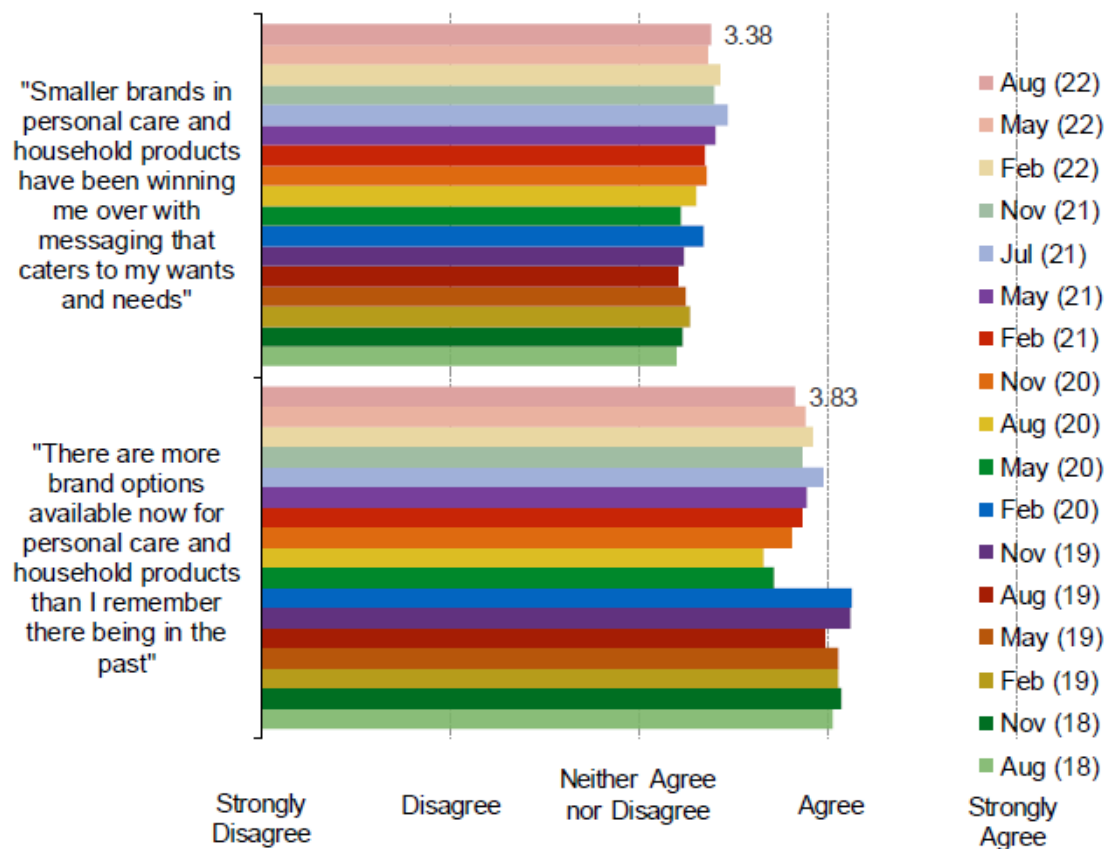
Source: CPGs and Personal Care Products Survey, US

CPGs | Davids vs. Goliaths

Consumers are increasingly likely to agree that smaller brands in CPGs and household products have been winning them over...

HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS?

Posed to all respondents



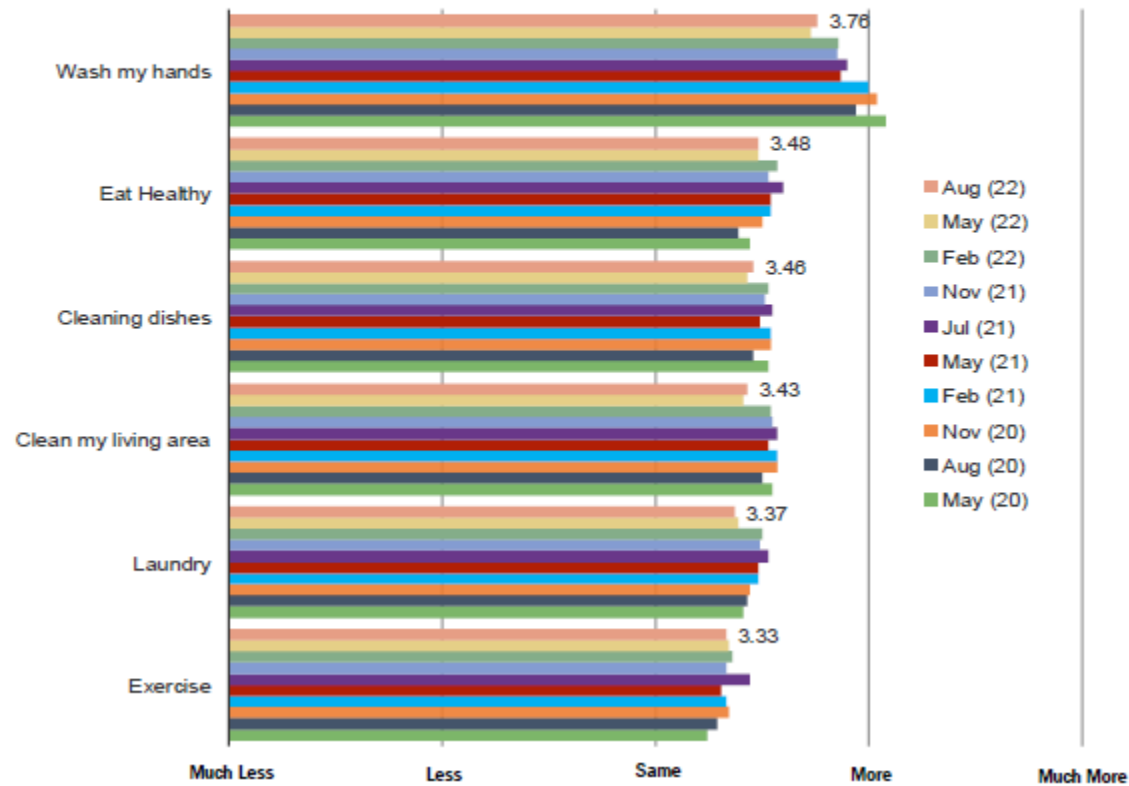
Source: CPGs and Personal Care Products Survey, US

CPGs | Hand Washing

The over-emphasis on hand washing during the pandemic has started to pull back...

HAVE YOU RECENTLY CHANGED HOW OFTEN YOU DO THE FOLLOWING?

Posed to all respondents.



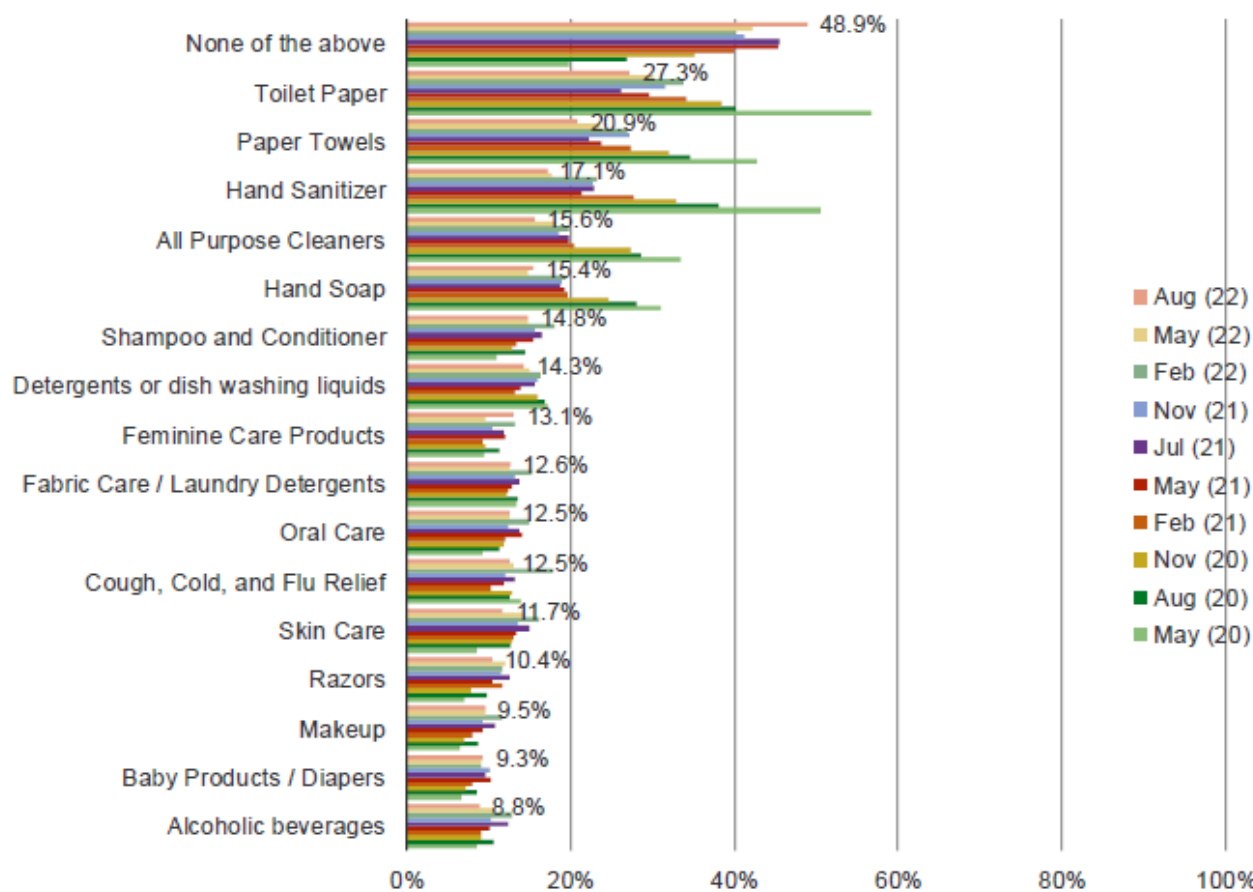
Source: CPGs and Personal Care Products Survey, US

CPGs | Out of Stock

Consumers are significantly less likely to encounter shortages compared to pandemic highs...

HAVE YOU HAD TROUBLE WITH INVENTORY OUTAGES OF ANY OF THE FOLLOWING TYPES OF PRODUCTS IN THE PAST MONTH? (SELECT ALL THAT APPLY)

Posed to all respondents.



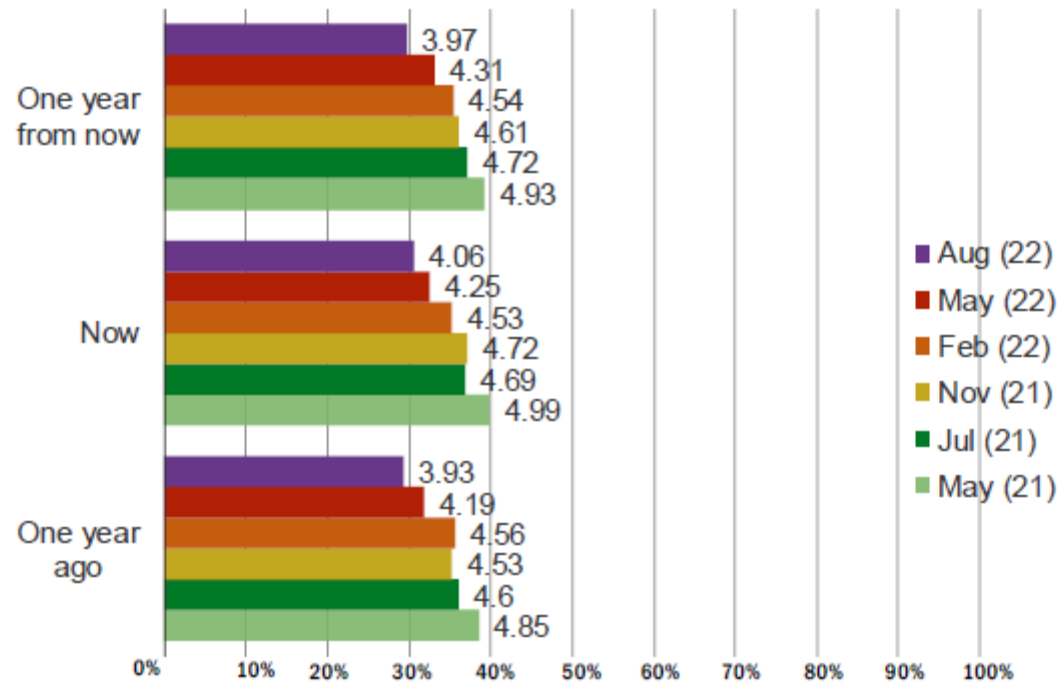
Source: CPGs and Personal Care Products Survey, US

CPGs | Hard Seltzer

Hard Seltzer's share of alcohol consumption is softening...

WHAT PERCENTAGE OF YOUR ALCOHOL CONSUMPTION WOULD YOU ESTIMATE GOES TO HARD SELTZER?

Posed to all respondents who have consumed hard seltzer (N = 618).



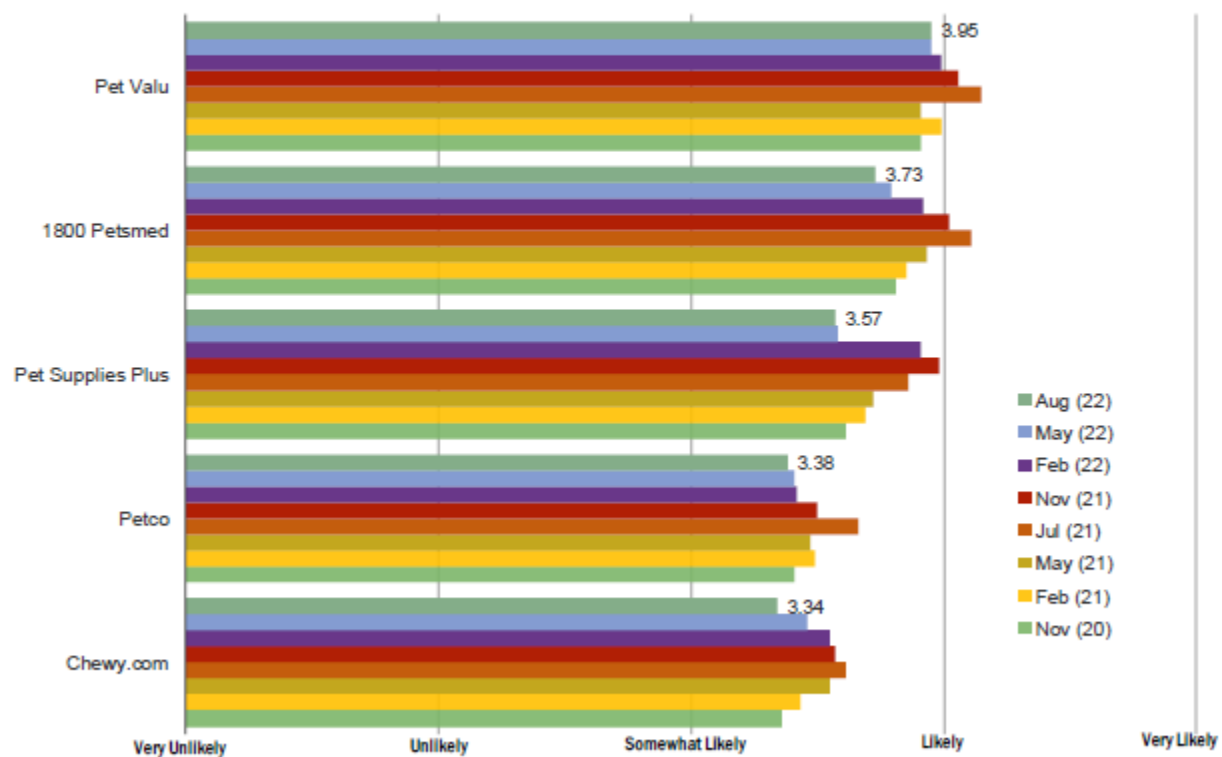
Source: CPGs and Personal Care Products Survey, US

Pet Retailers | Price Checking Amazon

The percentage of pet retailer customers who price check on Amazon often has declined sequentially...

WHEN YOU SHOP FOR PET FOOD OR PRODUCTS FROM THE FOLLOWING, HOW LIKELY ARE YOU TO PRICE CHECK THE ITEM ON AMAZON BEFORE MAKING THE PURCHASE?

Posed to pet owners who regularly or occasionally shop each of the following.



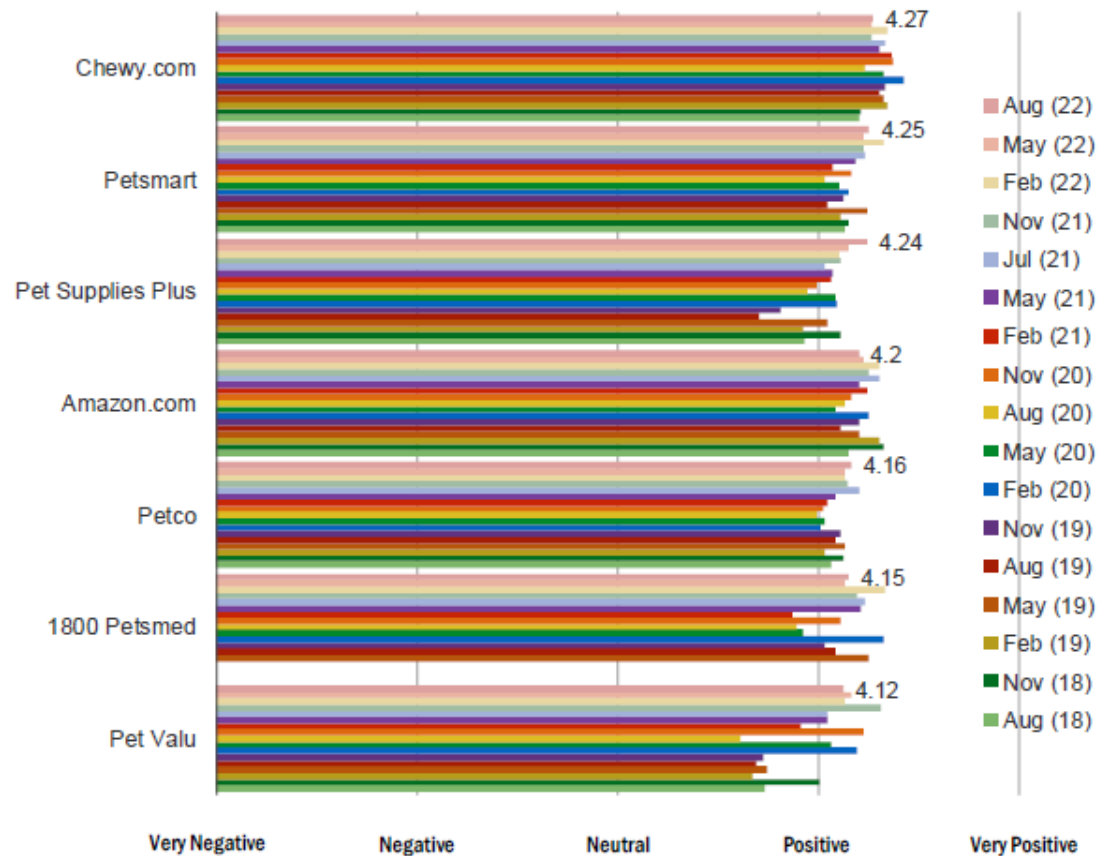
Source: Per Retailers Survey, US

Pet Retailers Customer Sentiment

Chewy customers offer the most positive feedback on the platform...

WHAT IS YOUR OPINION OF THIS RETAILER IN GENERAL FOR PET PRODUCT PURCHASES?

Posed to pet owners who have shopped each of the following retailers in the past month



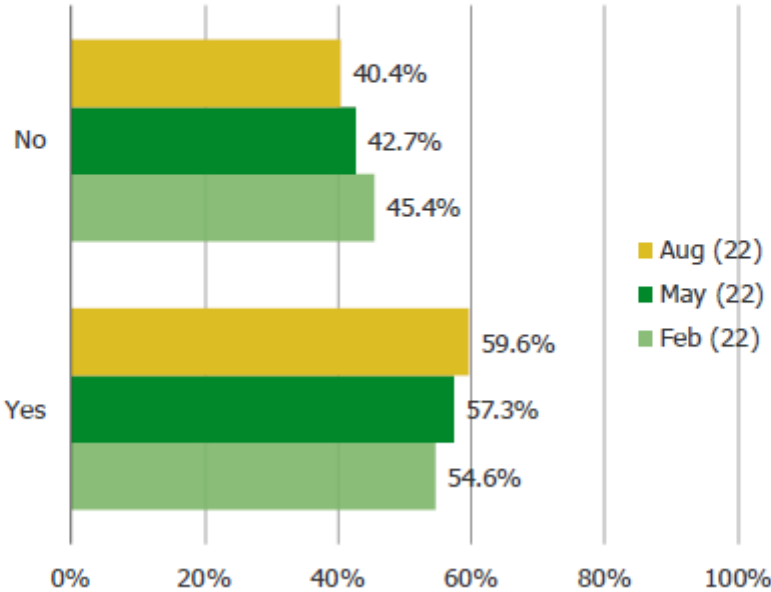
Source: Per Retailers Survey, US

Yeti Awareness

Yeti awareness has climbed higher sequentially...

DO YOU KNOW WHAT THE YETI BRAND IS?

Posed to all respondents.



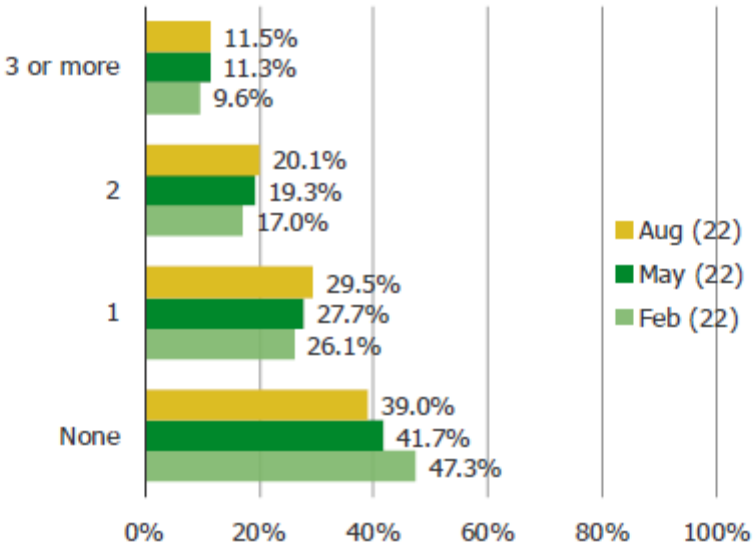
Source: Yeti Survey, US

Yeti Product Ownership

Among those who are aware of Yeti, number of items owned per respondents has increased...

DO YOU OWN ANY YETI ITEMS?

Posed to respondents who are aware of what Yeti is.



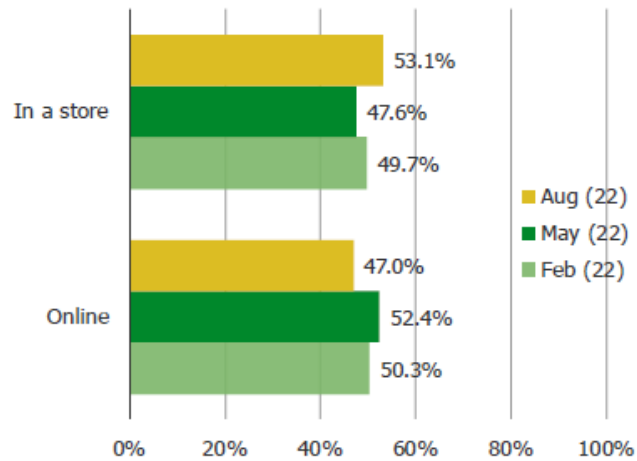
Source: Yeti Survey, US

Yeti Purchase Dynamics

Yeti owners were more likely to have made their most recent Yeti product in person and of those buying in a store, an increasing percentage did not specifically go to the store in order to buy a Yeti product...

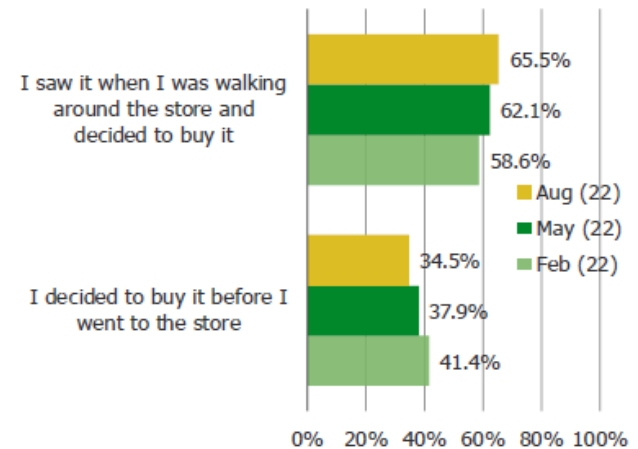
DID YOU MAKE YOUR MOST RECENT YETI PURCHASE ONLINE OR IN A STORE?

Posed to respondents who own one or more Yeti products.



WHEN DID YOU DECIDE TO BUY THE YETI PRODUCT YOU BOUGHT?

Posed to respondents who bought a Yeti product in a store.



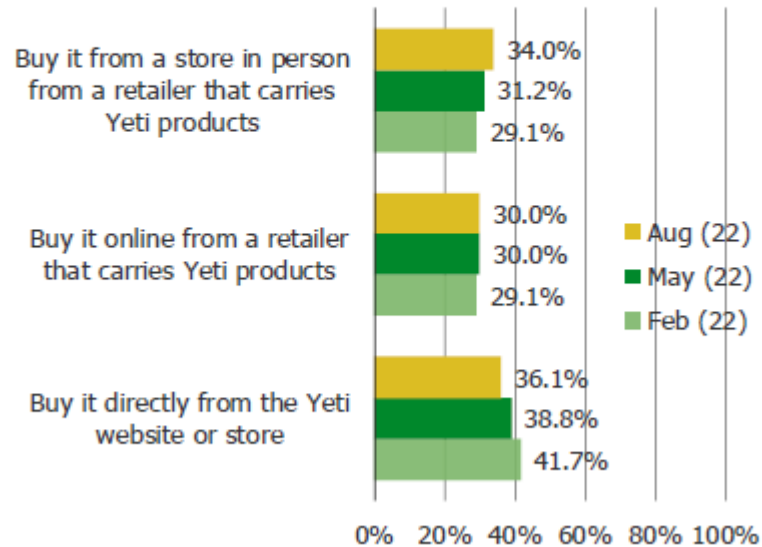
Source: Yeti Survey, US

Yeti Direct

Yeti owners are becoming less likely to go directly to Yeti for their next purchase...

IF YOU NEEDED OR WANTED TO BUY A YETI PRODUCT TODAY, WOULD YOU BE MORE LIKELY TO...

Posed to respondents who own one or more Yeti products.



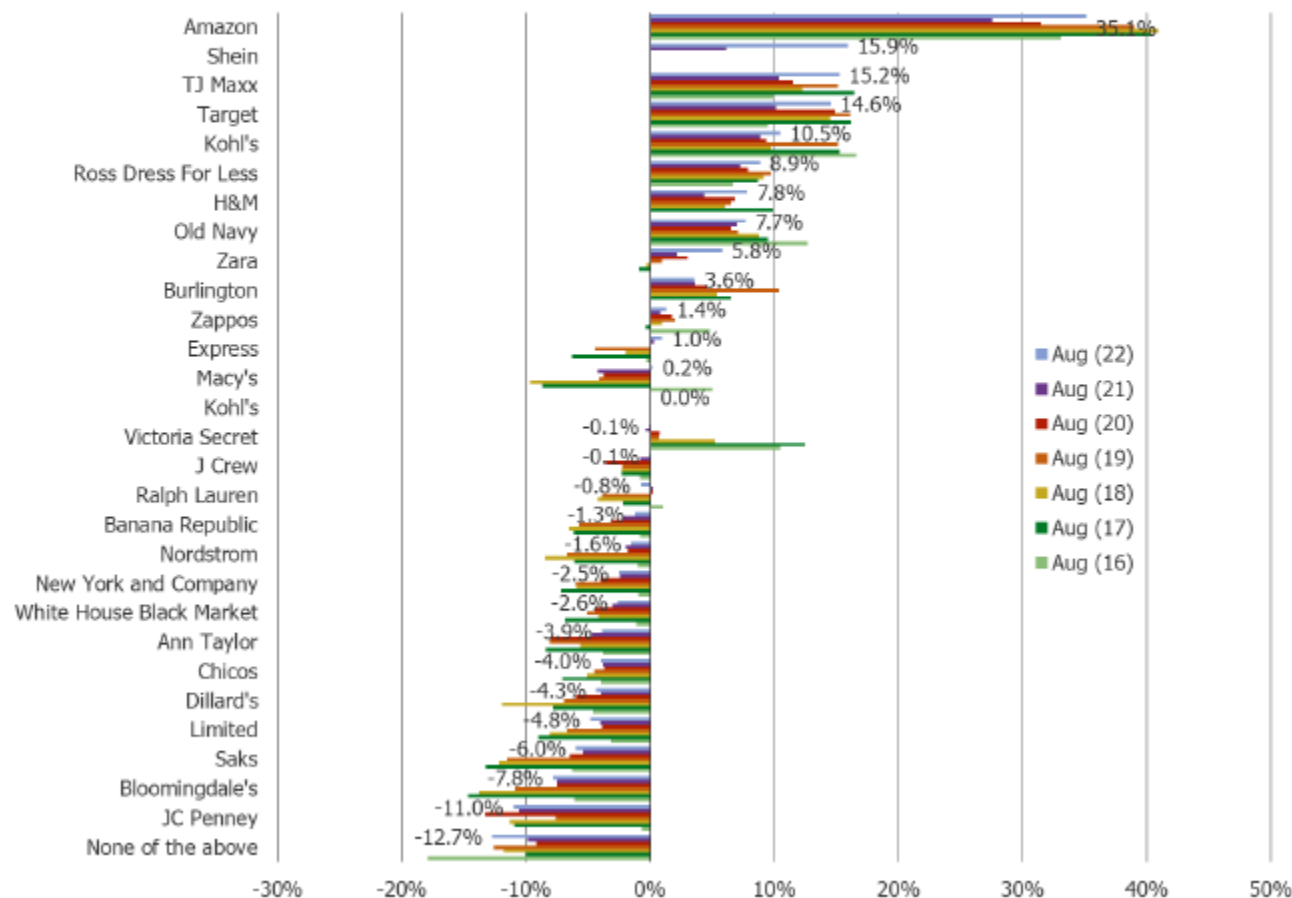
Source: Yeti Survey, US

Department Stores and Clothing Brands Popularity

Amazon + Lower Priced/Value options (Shein, TJ Maxx, Target, Kohls Ross, H&M, Old Navy, Zara, etc) are viewed most often as popularity gainers...

NET POPULARITY CHANGE - % SAID GAINING POPULARITY MINUS % SAID LOSING POPULARITY

Posed to all consumers.



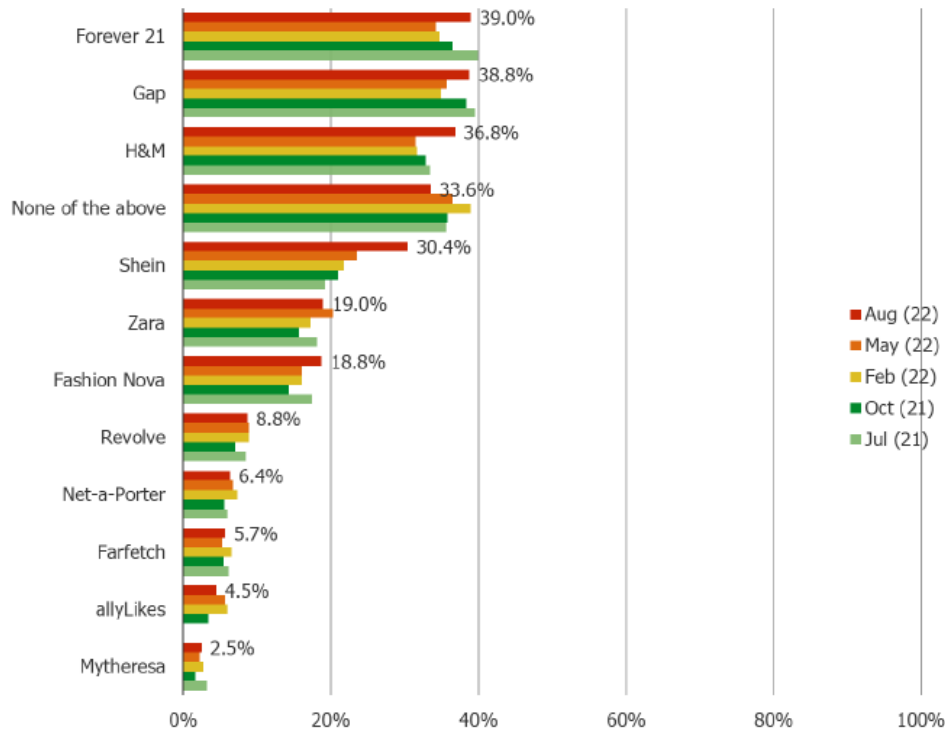
Source: Department Stores Survey, US

Shein Awareness and Engagement

Consumer awareness of Shein and purchases from Shein have increased considerably...

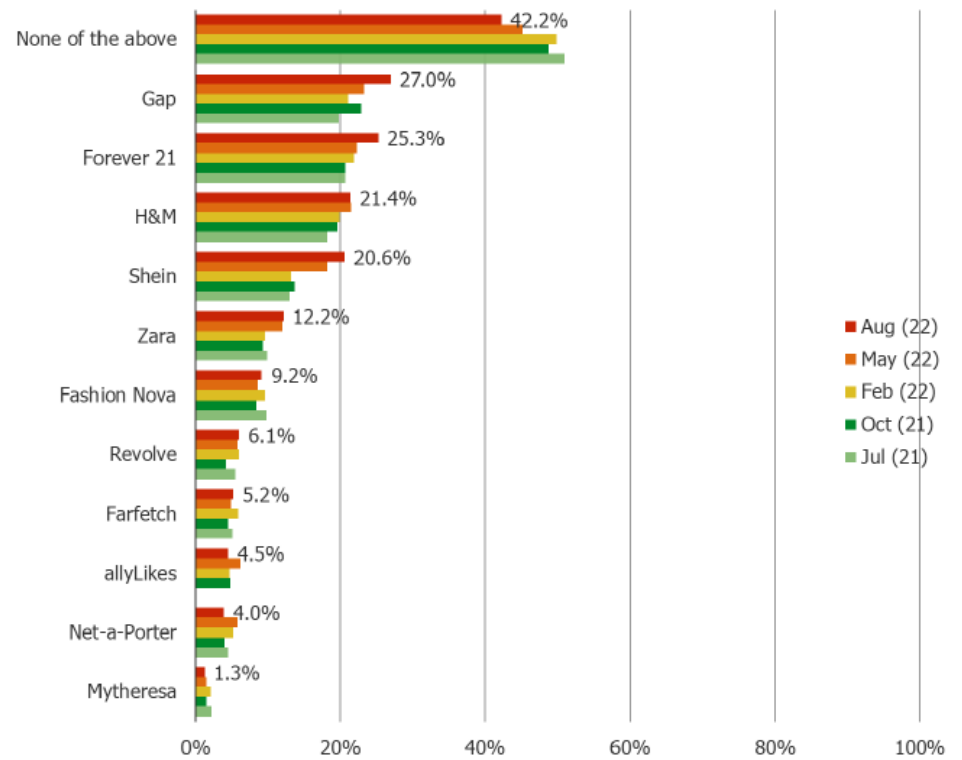
ARE YOU FAMILIAR WITH ANY OF THE FOLLOWING SITES/APPS?

Posed to all respondents.



HAVE YOU EVER MADE A PURCHASE FROM ANY OF THE FOLLOWING?

Posed to all respondents.



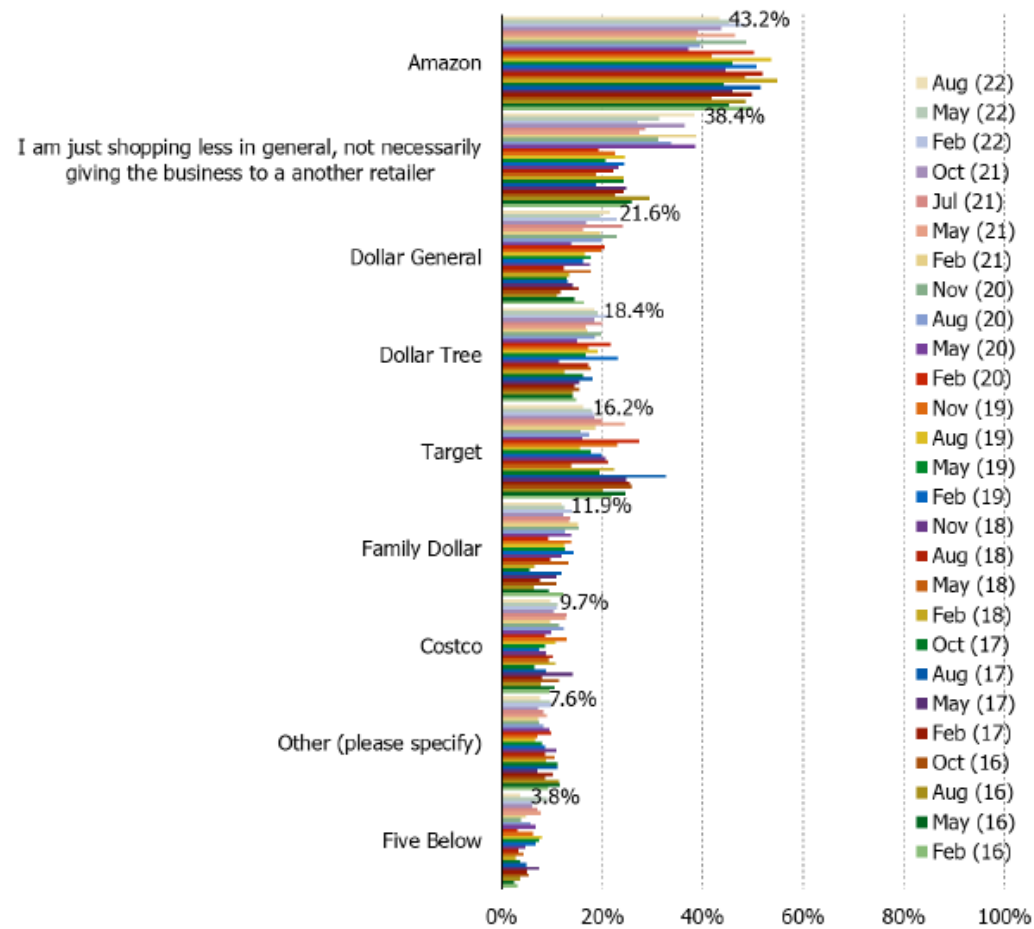
Source: Department Stores Survey, US

Wal-Mart Consumer Trends

Among those shopping Wal-Mart less, an increased percentage are either shopping less in general or are trading down to dollar stores...

SINCE YOU ARE SHOPPING LESS AT WAL-MART, ARE YOU GIVING THAT BUSINESS TO ANY OF THE FOLLOWING RETAILERS INSTEAD?

Posed to respondents who have purchased from Wal-Mart in the past 12 months AND said they have been shopping Wal-Mart less recently.



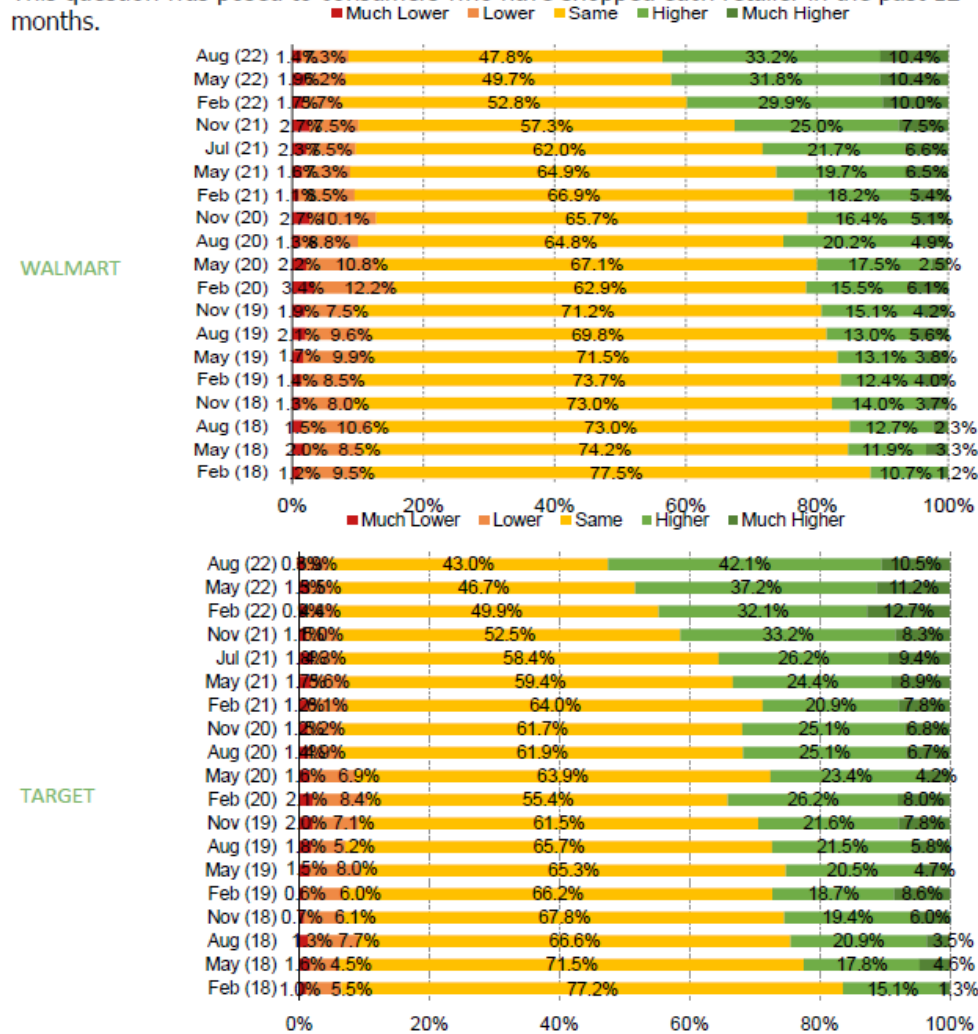
Source: Low Cost Retailers Survey, US

WMT and TGT Pricing

Customers of both Wal-Mart and Target have become considerably more likely to say they noticed prices increasing during their last visit...

WHEN YOU LAST VISITED, DID YOU NOTICE ANY CHANGES TO PRODUCT PRICES?

This question was posed to consumers who have shopped each retailer in the past 12 months.



Source: Low Cost Retailers Survey, US

BBQ Grills Mindshare

The first brand that comes to mind when consumers think about grills is Weber...

WHEN YOU THINK OF GRILLS/BARBEQUES, WHICH BRAND COMES TO MIND FIRST?

Posed to all respondents who own a grill/barbeque.



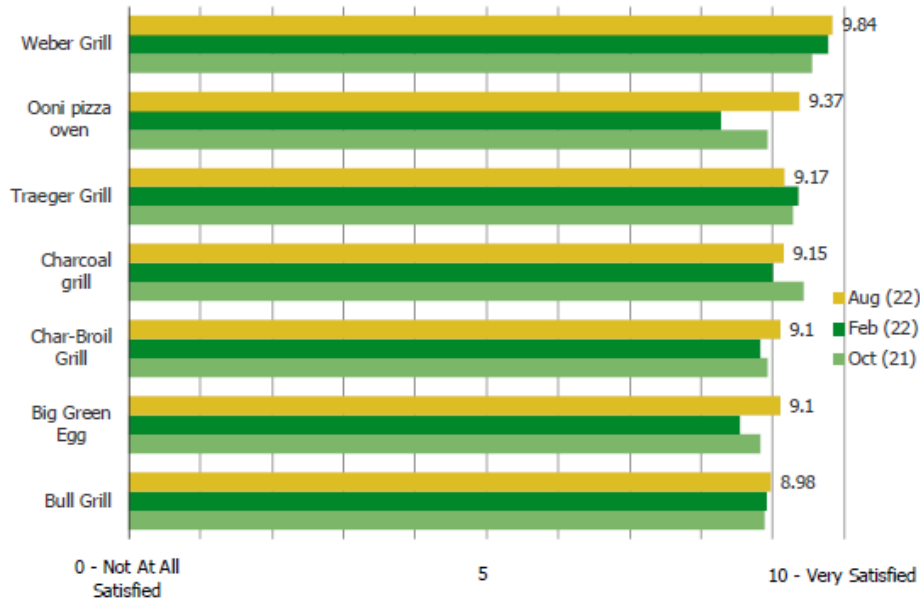
Source: BBQ Grills Survey, US

BBQ Grills Satisfaction

Weber Grill owners are very satisfied with the product and satisfaction has only increased over time...

HOW SATISFIED ARE YOU WITH THE FOLLOWING PRODUCT(S)?

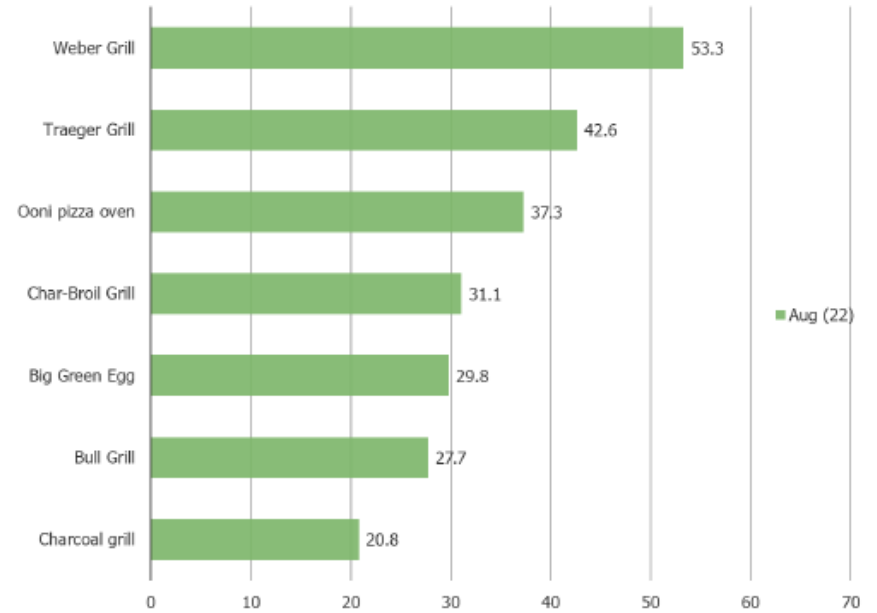
Posed to all respondents who own the below.



	N=
Weber Grill	336
Traeger Grill	115
Bull Grill	101
Big Green Egg	124
Char-Broil Grill	251
Ooni pizza oven	75
Charcoal grill	178

HOW LIKELY ARE YOU TO RECOMMEND THE FOLLOWING TO A FRIEND OR COLLEAGUE (NPS)?

Posed to all respondents who own the below.



	N=
Weber Grill	336
Traeger Grill	115
Bull Grill	101
Big Green Egg	124
Char-Broil Grill	251
Ooni pizza oven	75
Charcoal grill	178

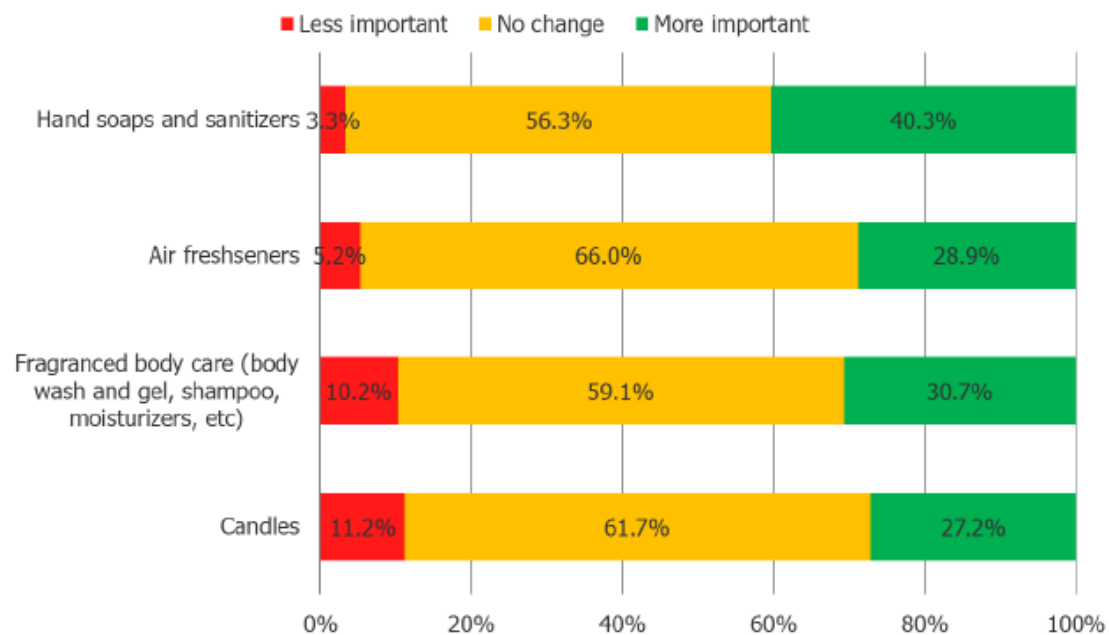
Source: BBQ Grills Survey, US

Hand Soaps and Sanitizers Importance

Hand soaps and sanitizers are becoming more important to respondents...

ARE THE FOLLOWING BECOMING MORE OR LESS IMPORTANT TO YOU OVER TIME?

Posed to all respondents who regularly or occasionally use the below products.



	N =
Candles	556
Fragranced body care (body wash and gel, shampoo, moisturizers, etc)	824
Air fresheners	676
Hand soaps and sanitizers	957

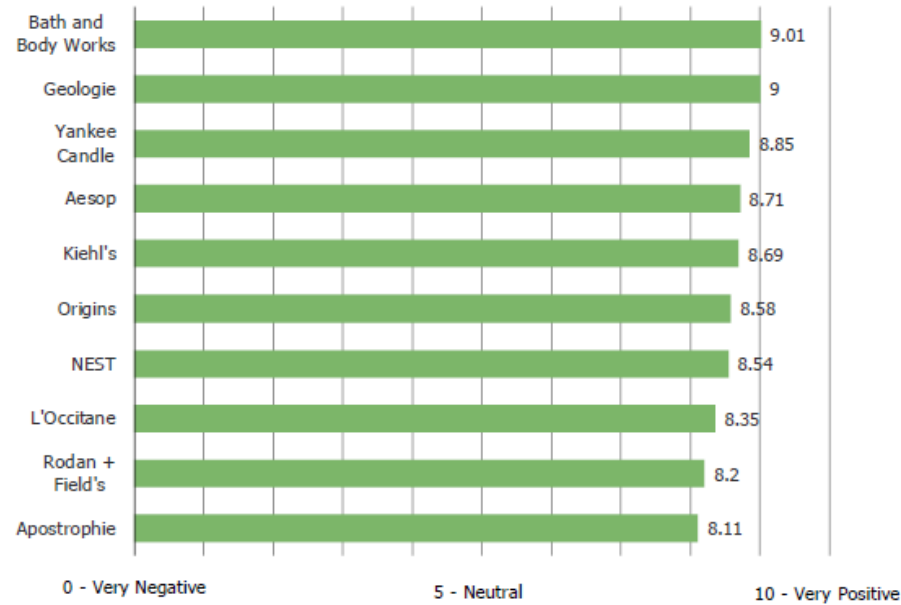
Source: Bath and Body Works Survey, US

BBWI Brand Opinion

BBWI has a rare combination of high awareness relative to peers and strongest brand opinion relative to peers...

WHAT IS YOUR OPINION OF THE FOLLOWING BRANDS?

Posed to all respondents who are familiar with the below.



	N=
Bath and Body Works	818
Yankee Candle	703
NEST	156
Rodan + Field's	140
Origins	166
L'Occitane	178
Apostrophe	162
Aesop	102
Kiehl's	202
Geologie	57

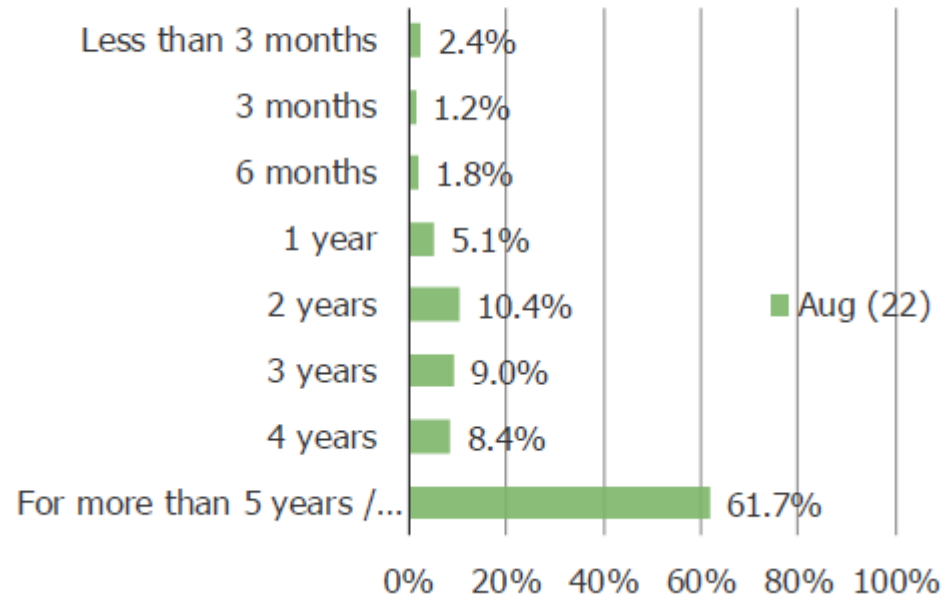
Source: Bath and Body Works Survey, US

BBWI Stickiness

More than half of BBWI customers first bought from the brand 5+ years ago...

FOR HOW LONG HAVE YOU BEEN A CUSTOMER OF BATH AND BODY WORKS?

Posed to all respondents who have purchased or received products from Bath and Body Works.



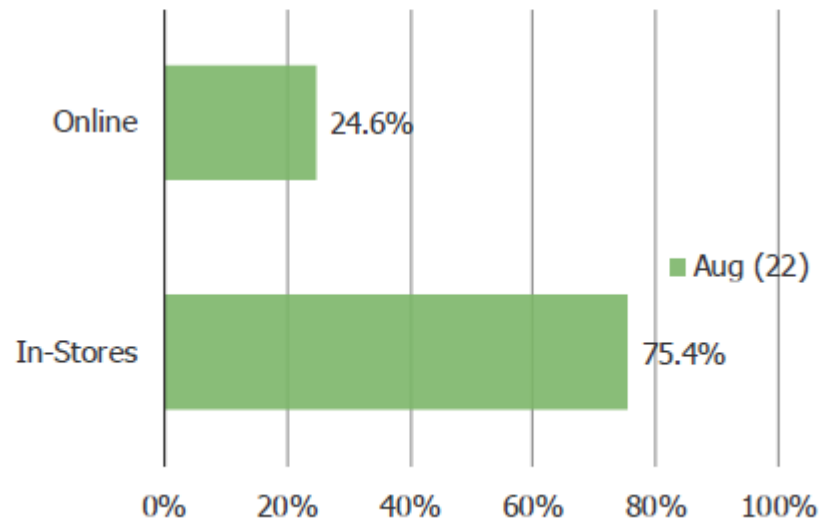
Source: Bath and Body Works Survey, US

BBWI In-Store vs. Online

BBWI is a brand that customers prefer to shop in-store.

HOW DO YOU PREFER TO SHOP BATH AND BODY WORKS?

Posed to all respondents who have purchased or received products from Bath and Body Works.



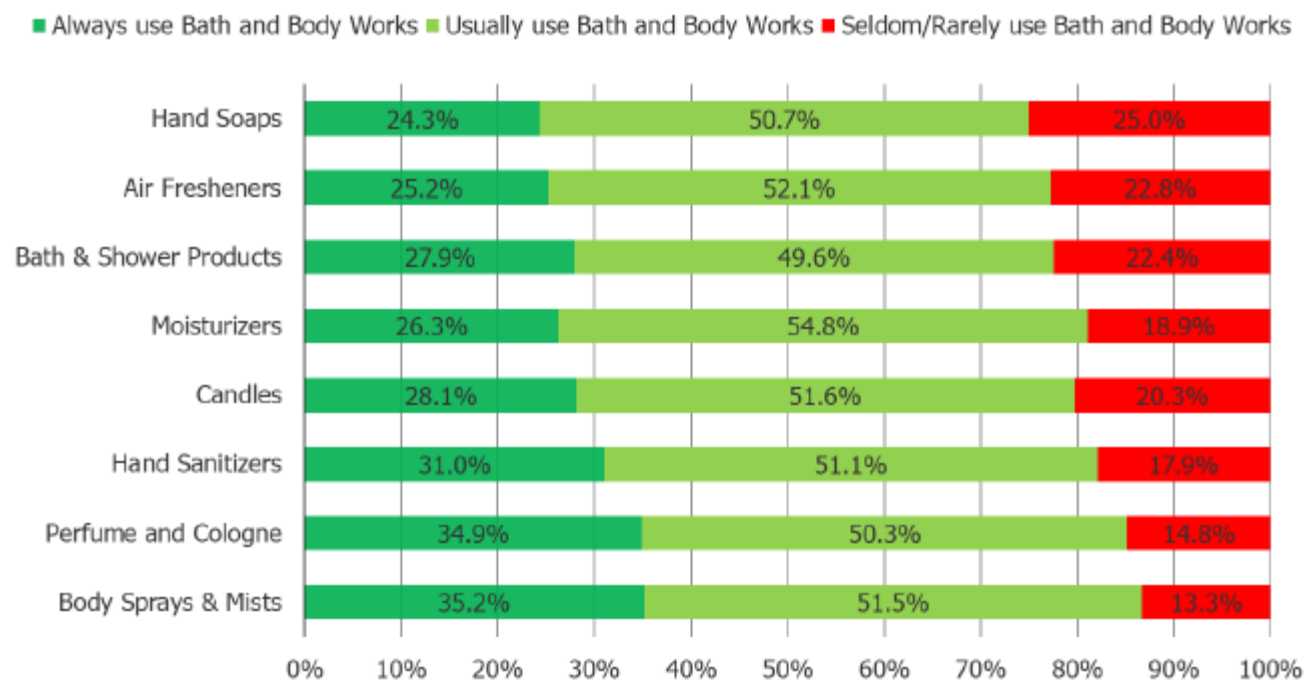
Source: Bath and Body Works Survey, US

BBWI Loyalty

BBWI customers are loyal to the brand across categories...

FOR THIS TYPE OF PRODUCT, DO YOU ALWAYS USE BATH AND BODY WORKS OR DO YOU USE OTHER BRANDS AS WELL?

Posed to all respondents who have purchased or received products from Bath and Body Works.



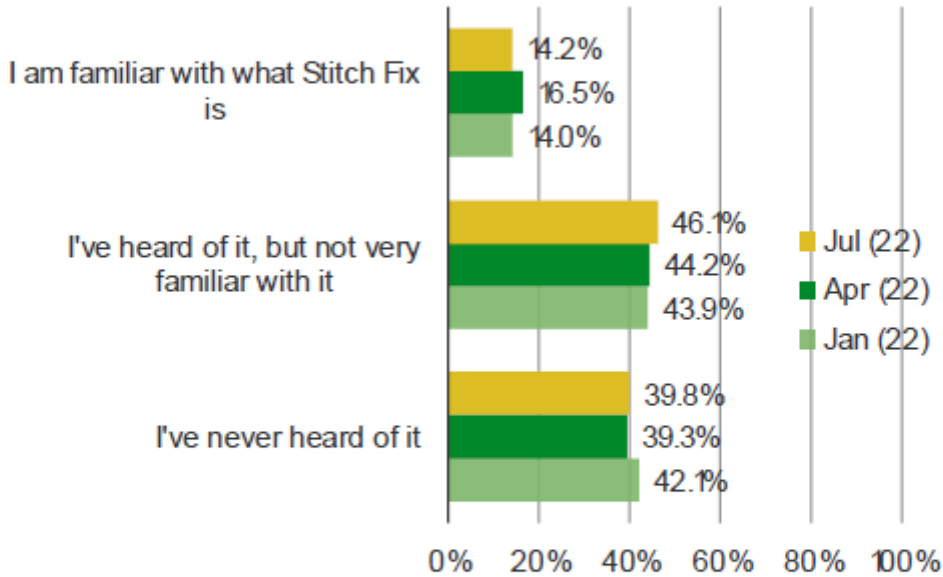
Source: Bath and Body Works Survey, US

SFIX Awareness

Among those who have never shopped SFIX, awareness remains stubbornly low...

HAVE YOU HEARD OF STITCH FIX?

This question was posed to respondents who have never shopped SFIX.



N = 1383

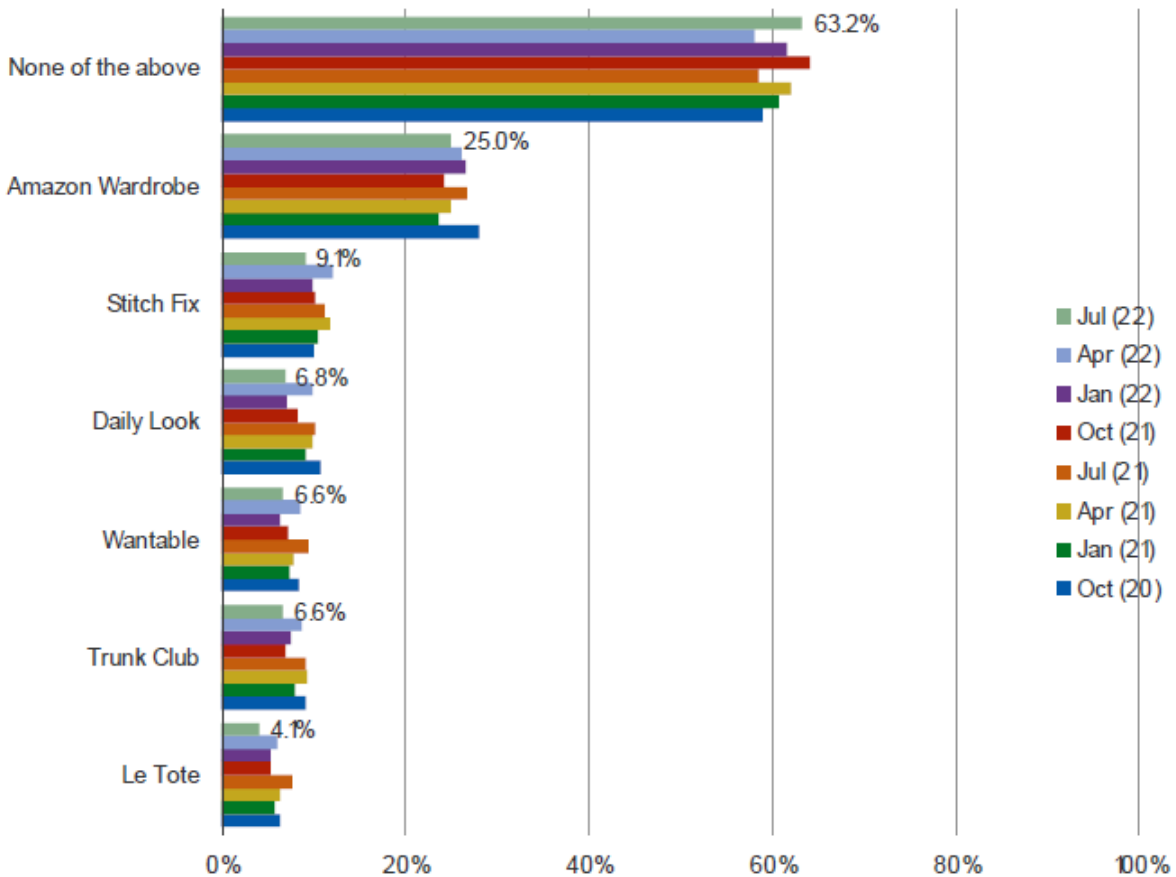
Source: SFIX Survey, US

SFIX Purchases

The percentage of consumers who have purchased items from SFIX has been mostly flat over time...

HAVE YOU EVER MADE PURCHASES FROM ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents.



Source: SFIX Survey, US

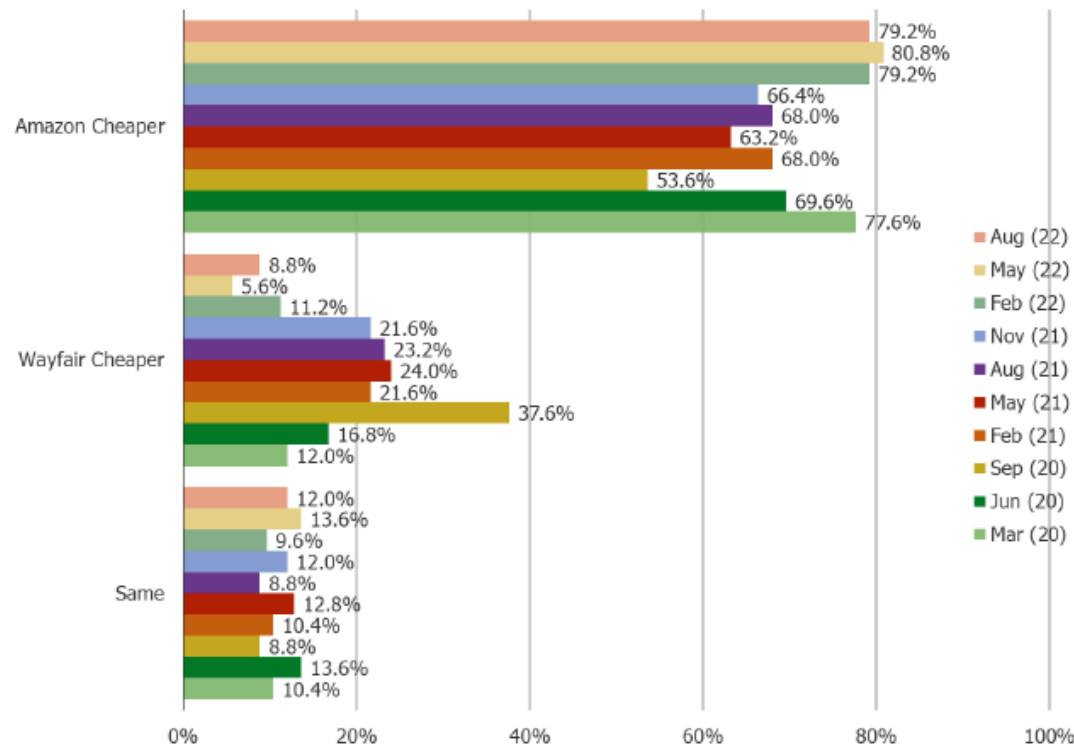
AMZN vs. W Pricing Analysis

In recent quarters, the % of times Amazon is cheaper than Wayfair has increased...

FINDINGS: PRICING ANALYSIS

- On identical/similar items, Amazon is cheaper than Wayfair, but the share of times Wayfair was cheaper increased.

% of items out of the total that were cheaper on Amazon vs. Wayfair



Source: AMZN vs. W Identical Items Pricing Analysis

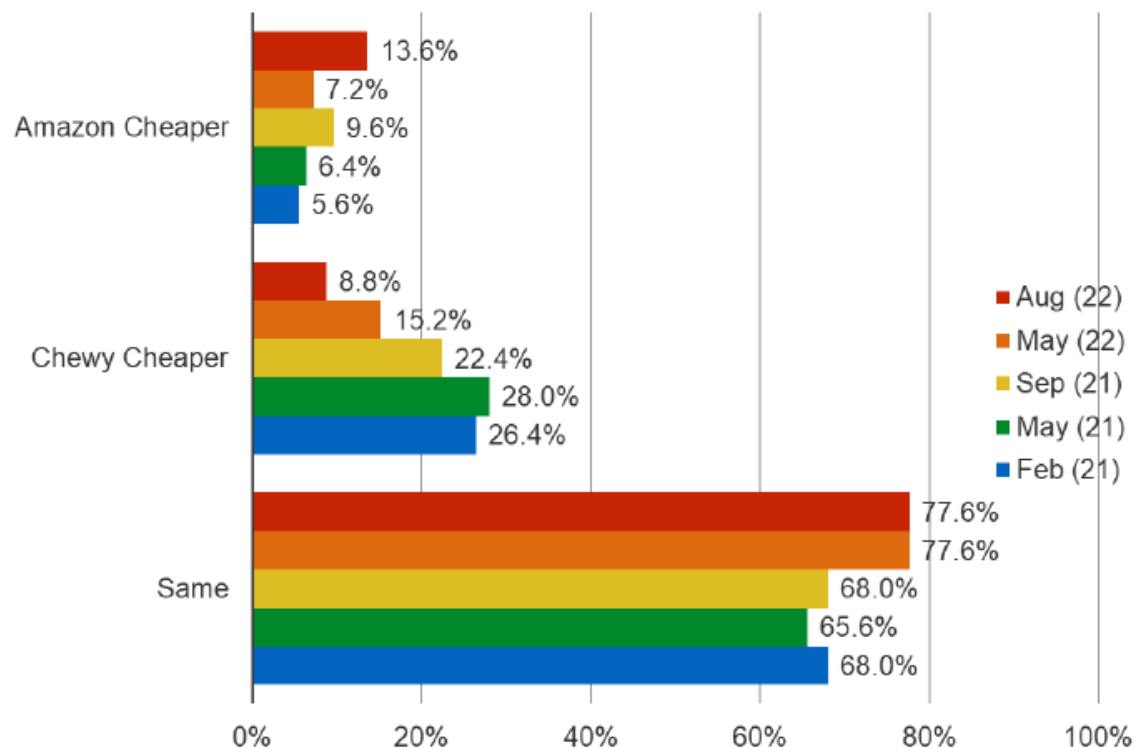
AMZN vs. CHWY Pricing Analysis

In recent quarters, the % of times Amazon is cheaper than Chewy has increased...

FINDINGS: PRICING ANALYSIS

- On identical items, Amazon and Chewy are more often than not in-line with one another on price. The % of times Chewy is cheaper has declined sequentially.

% of items out of the total that were cheaper on Amazon vs. Chewy



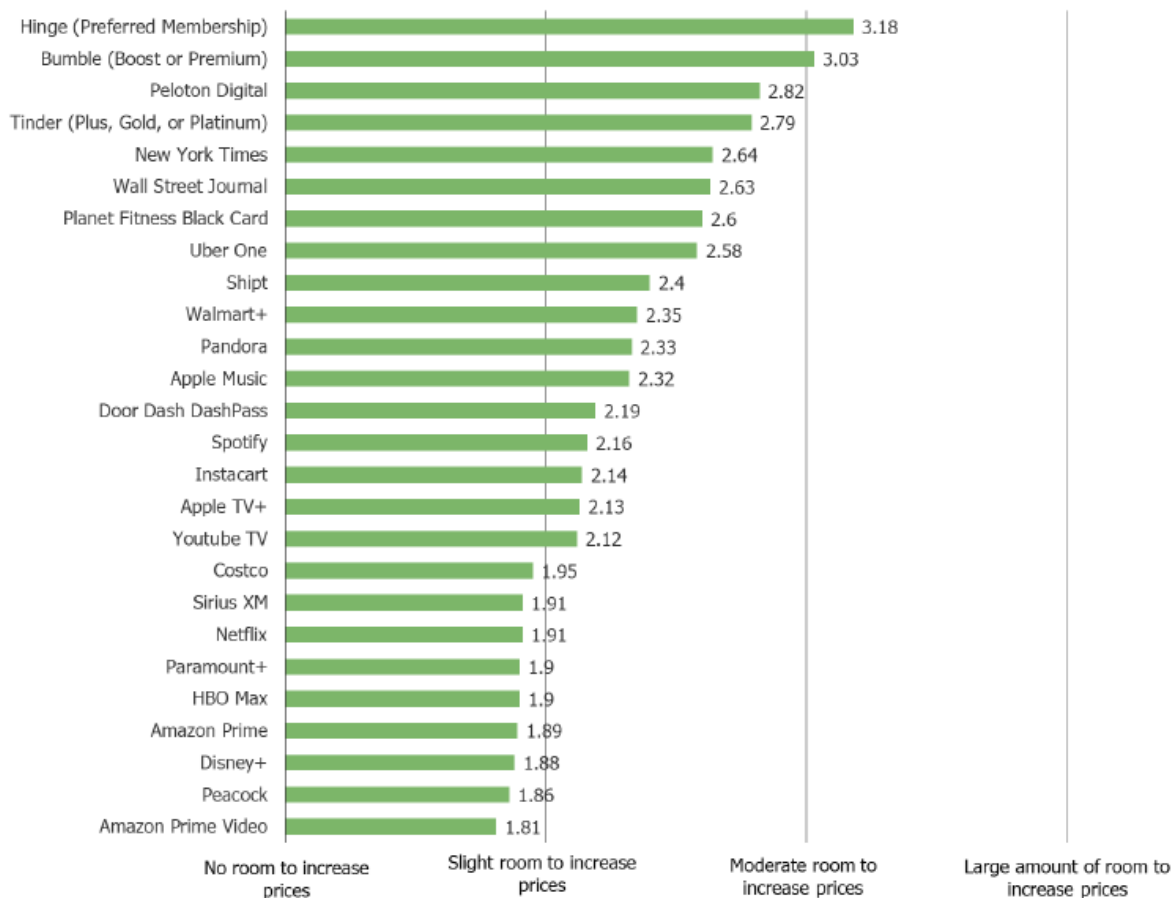
Source: AMZN vs. W Identical Items Pricing Analysis

Internet Subscriptions | Pricing Power

Online dating apps, PTON/PLNT, and News subscriptions have the most pricing power...

Pricing Power | How much can the following increase prices for their service without causing you to stop paying for it?

Posed to respondents who said they are currently paying for subscriptions with each of the following.



	N =
Amazon Prime Video	1081
Costco	361
Peacock	419
Disney+	734
Amazon Prime	1180
HBO Max	592
Paramount+	416
Netflix	1430
Sirius XM	273
Youtube TV	283
Apple TV+	216
Instacart	172
Spotify	534
Door Dash DashPass	198
Apple Music	331
Pandora	309
Walmart+	359
Shipt	43
Uber One	122
Planet Fitness Black Card	132
Wall Street Journal	117
New York Times	183
Tinder (Plus, Gold, or Platinum)	80
Peloton Digital	76
Bumble (Boost or Premium)	61
Hinge (Preferred Membership)	49

Source: Internet Subscriptions Survey, US

Streaming Subscriptions | Pricing Power

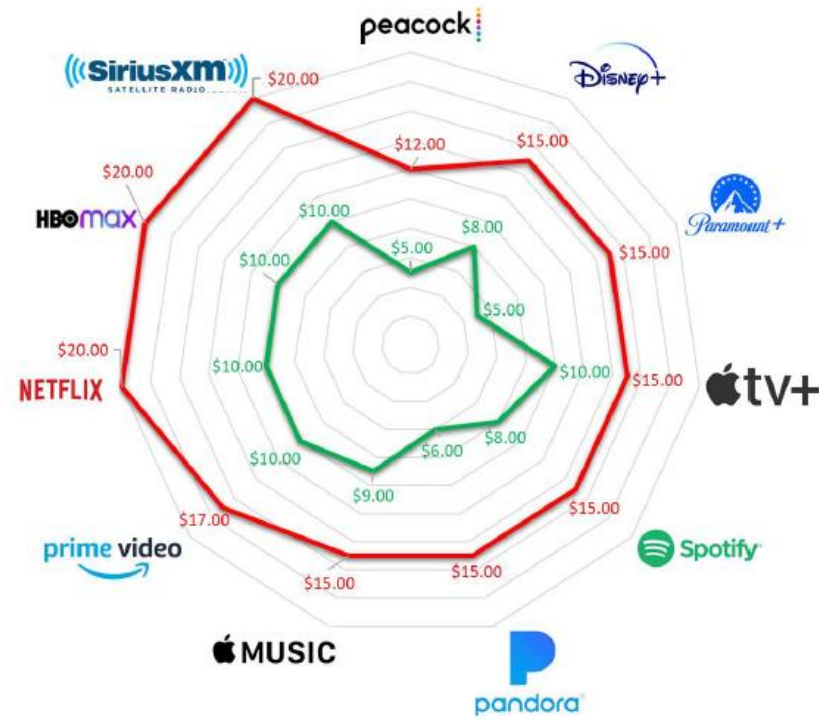
Among streaming platforms, Netflix, HBO Max, and Sirius have the most pricing power...

Fill-Ins | What Price Subscribers Would Consider It To Be:

- a) A Bargain
- b) So expensive that they would decide to cancel

Posed to respondents who said they are currently paying for subscriptions with each of the following.

— Median Price Considered a Bargain — Median Price That Would Cause Cancellation



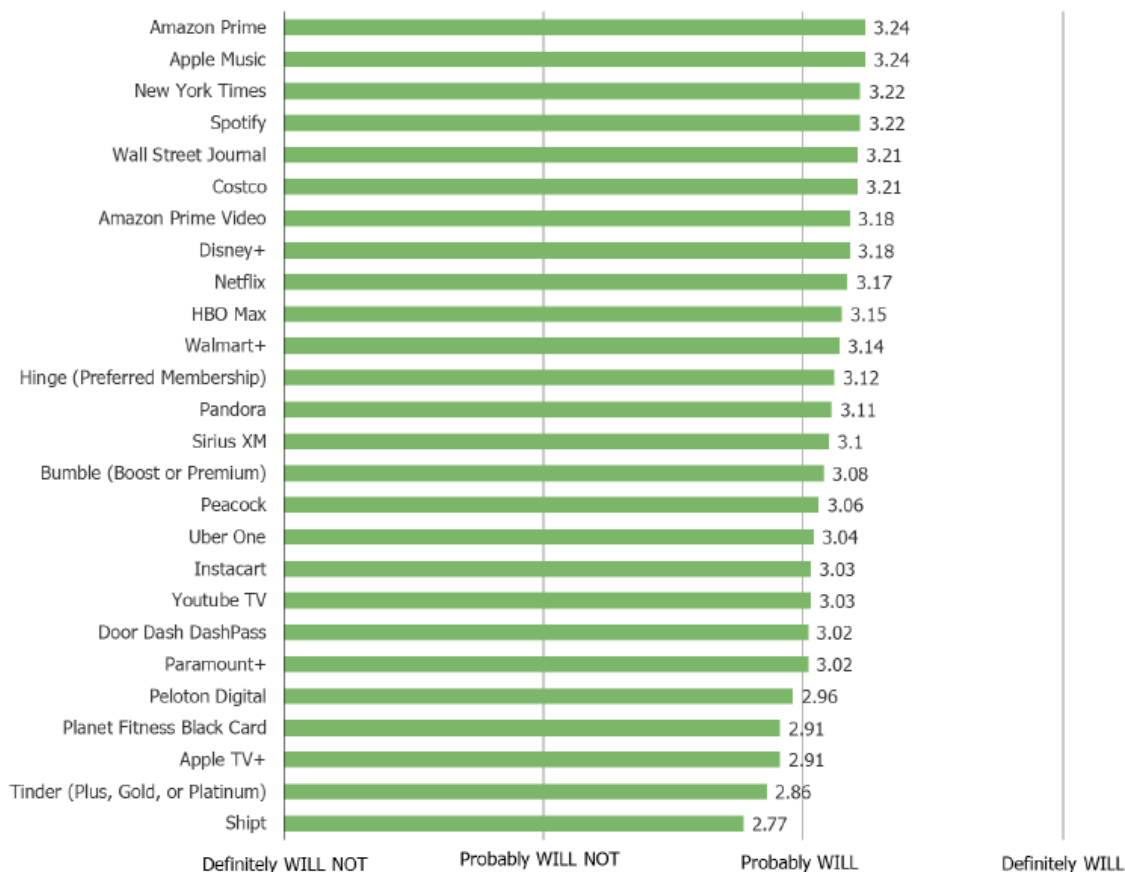
Source: Internet Subscriptions Survey, US

Internet Subscriptions | Stickiness

Amazon Prime and Apple Music are the stickiest subscriptions...

Stickiness | How likely are you to still be paying for the following one year from now?

Posed to respondents who said they are currently paying for subscriptions with each of the following.



	N =
Amazon Prime Video	1081
Costco	361
Peacock	419
Disney+	734
Amazon Prime	1180
HBO Max	592
Paramount+	416
Netflix	1430
Sirius XM	273
Youtube TV	283
Apple TV+	216
Instacart	172
Spotify	534
Door Dash DashPass	198
Apple Music	331
Pandora	309
Walmart+	359
Shipt	43
Uber One	122
Planet Fitness Black Card	132
Wall Street Journal	117
New York Times	183
Tinder (Plus, Gold, or Platinum)	80
Peloton Digital	76
Bumble (Boost or Premium)	61
Hinge (Preferred Membership)	49

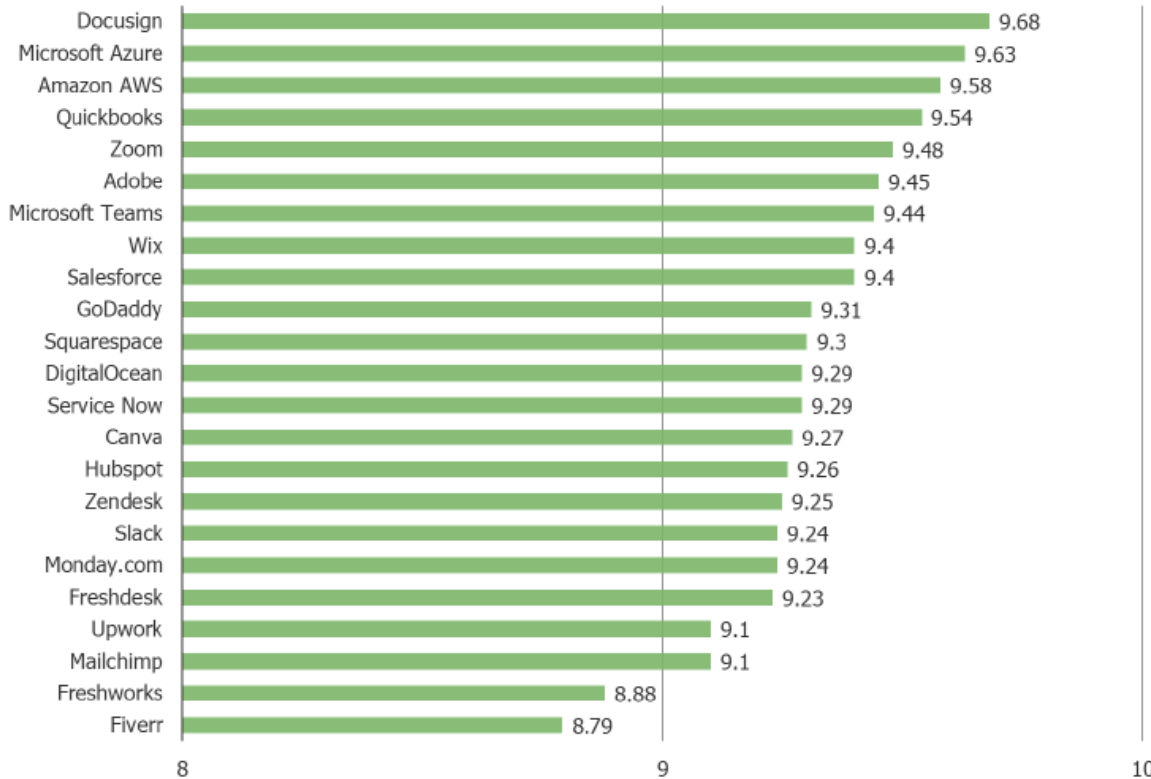
Source: Internet Subscriptions Survey, US

SAAS Satisfaction

Of all platforms, DocuSign has the strongest customer satisfaction...

How satisfied are you with the following?

Posed to respondents who self-reported that their company uses each of the following.



Weighted Average Scale:
1-11 (Not satisfied at all -> Very satisfied)

	N =
Zoom	386
Microsoft Teams	356
Adobe	346
Salesforce	249
Quickbooks	240
Microsoft Azure	227
Amazon AWS	210
DocuSign	207
GoDaddy	129
Slack	121
Zendesk	114
Squarespace	112
Canva	88
Service Now	77
Mailchimp	73
Upwork	71
Wix	65
Fiverr	62
Hubspot	58
Monday.com	56
Monday.com	50
Freshworks	41
Freshdesk	39
Dobe	37
DigitalOcean	31

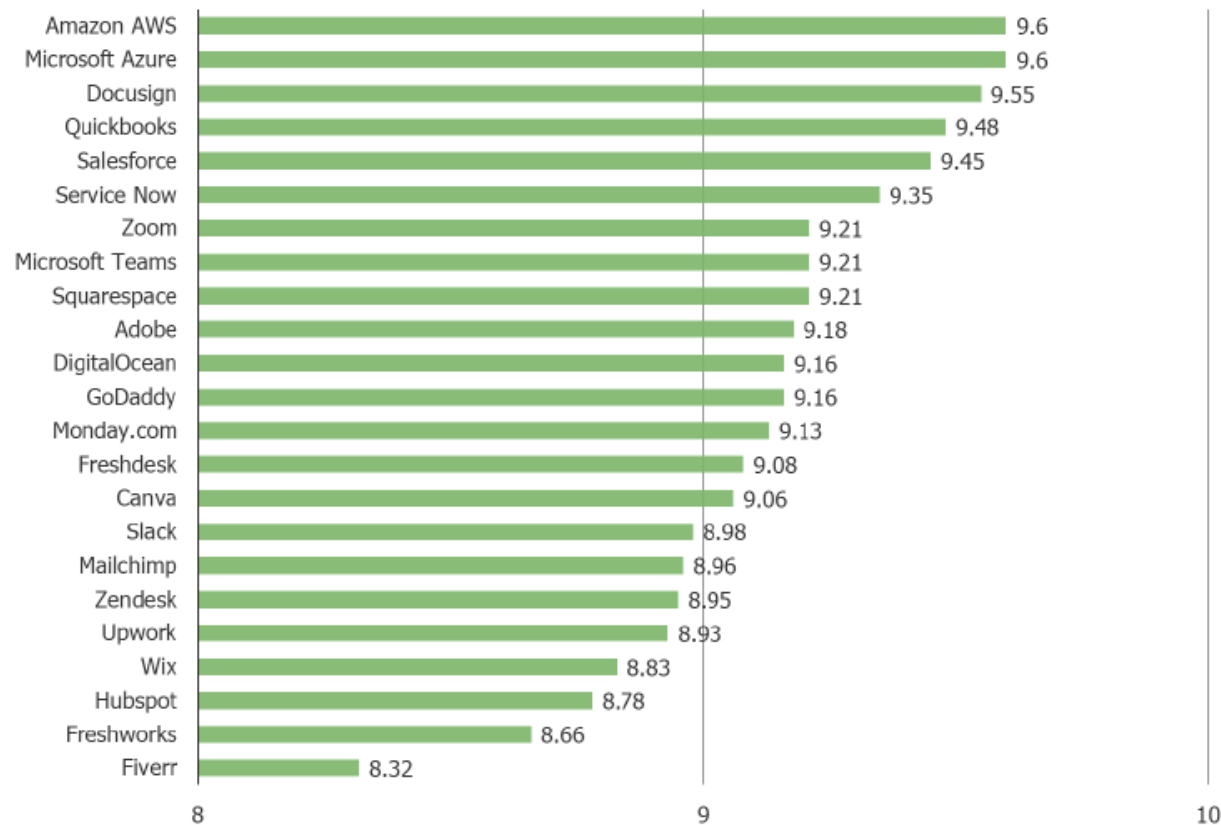
Source: SMB & IT Decision Maker Survey, US

SAAS Importance

Cloud services and DocuSign are the most important to IT Decision makers...

How important are the following to your business?

Posed to respondents who self-reported that their company uses each of the following.



Weighted Average Scale:
1-11 (Not very important -> Extremely important)

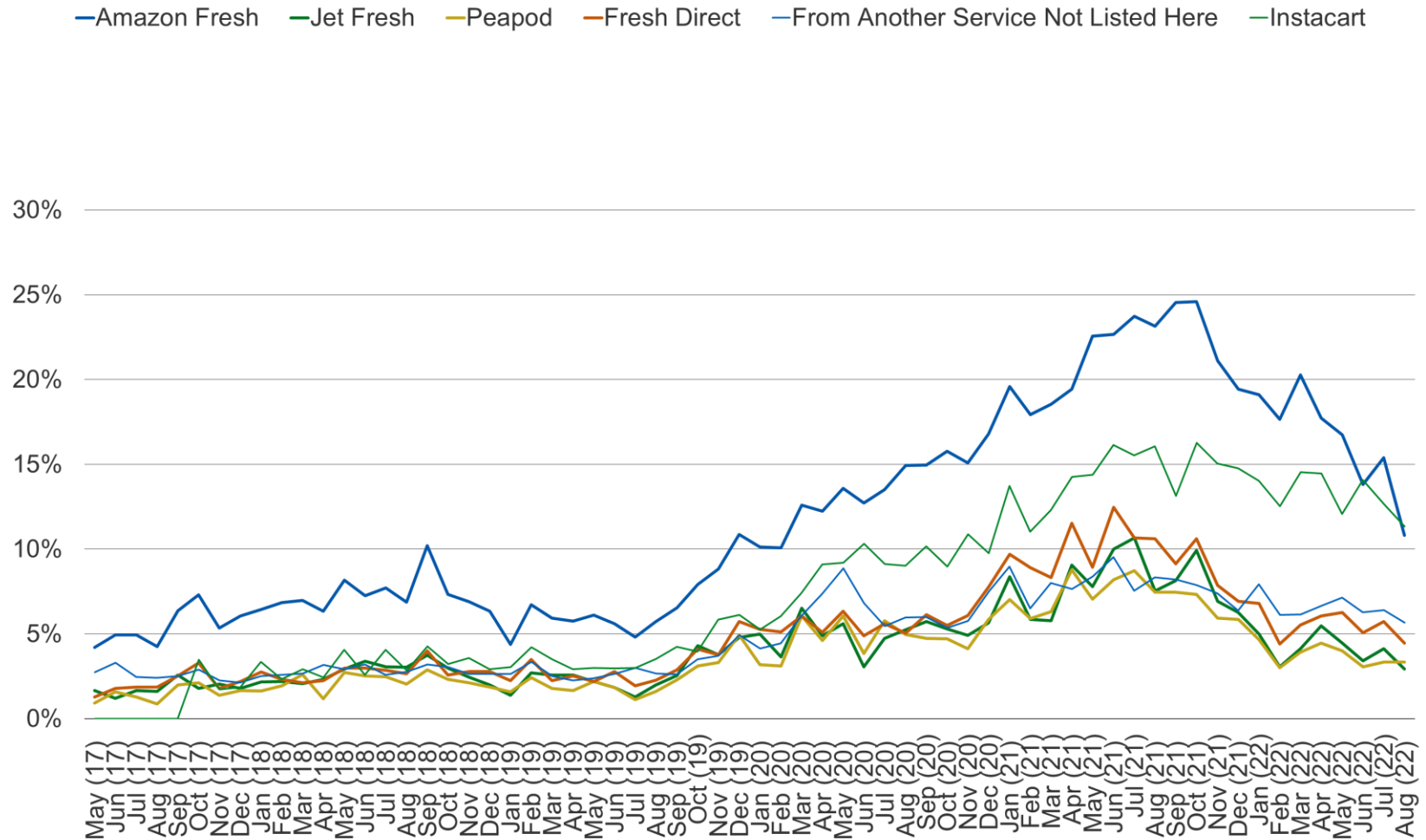
	N =
Zoom	386
Microsoft Teams	356
Adobe	346
Salesforce	249
Quickbooks	240
Microsoft Azure	227
Amazon AWS	210
DocuSign	207
GoDaddy	129
Slack	121
Zendesk	114
Squarespace	112
Canva	88
Service Now	77
Mailchimp	73
Upwork	71
Wix	65
Fiverr	62
Hubspot	58
Monday.com	56
Monday.com	50
Freshworks	41
Freshdesk	39
Dobe	37
DigitalOcean	31

Source: SMB & IT Decision Maker Survey, US

Online Grocery Usage Each Month

After surging during the pandemic, the percentage of consumers who had groceries delivered during the past month has softened...

Have you gotten groceries delivered in the past month from any of the following?
Posed to all respondents.



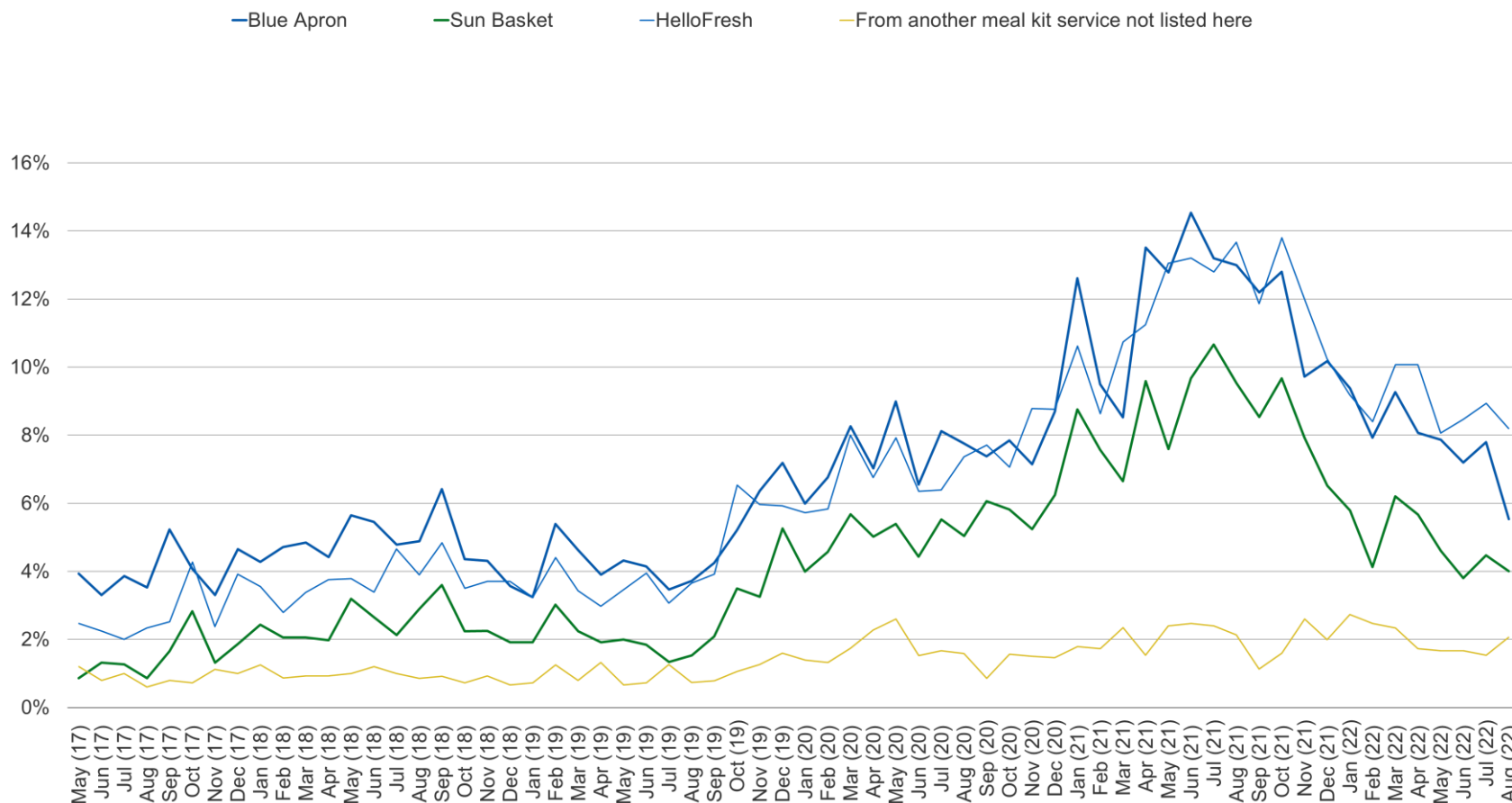
Source: Monthly Survey of US Consumers

Meal Kits Usage Each Month

After surging during the pandemic, the percentage of consumers who had meal kits delivered during the past month has softened...

Have you gotten meal kits delivered from any of the following in the past month?

Posed to all respondents.



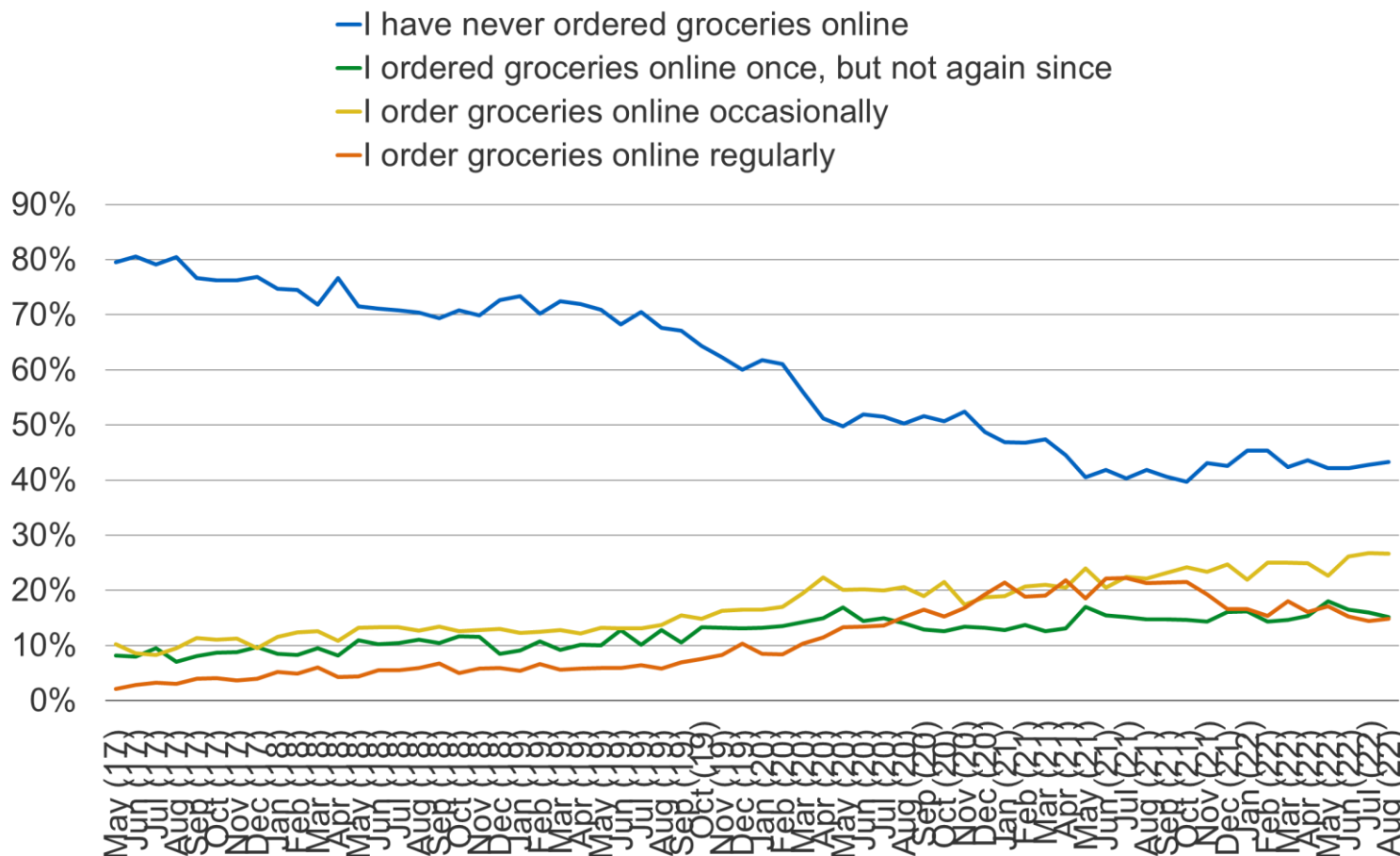
Source: Monthly Survey of US Consumers

Online Grocery Ordering In General

After gaining share for a number of months, consumer participation in online grocery ordering has been flatter of late...

Please characterize your experience with ordering groceries online:

Posed to all respondents.



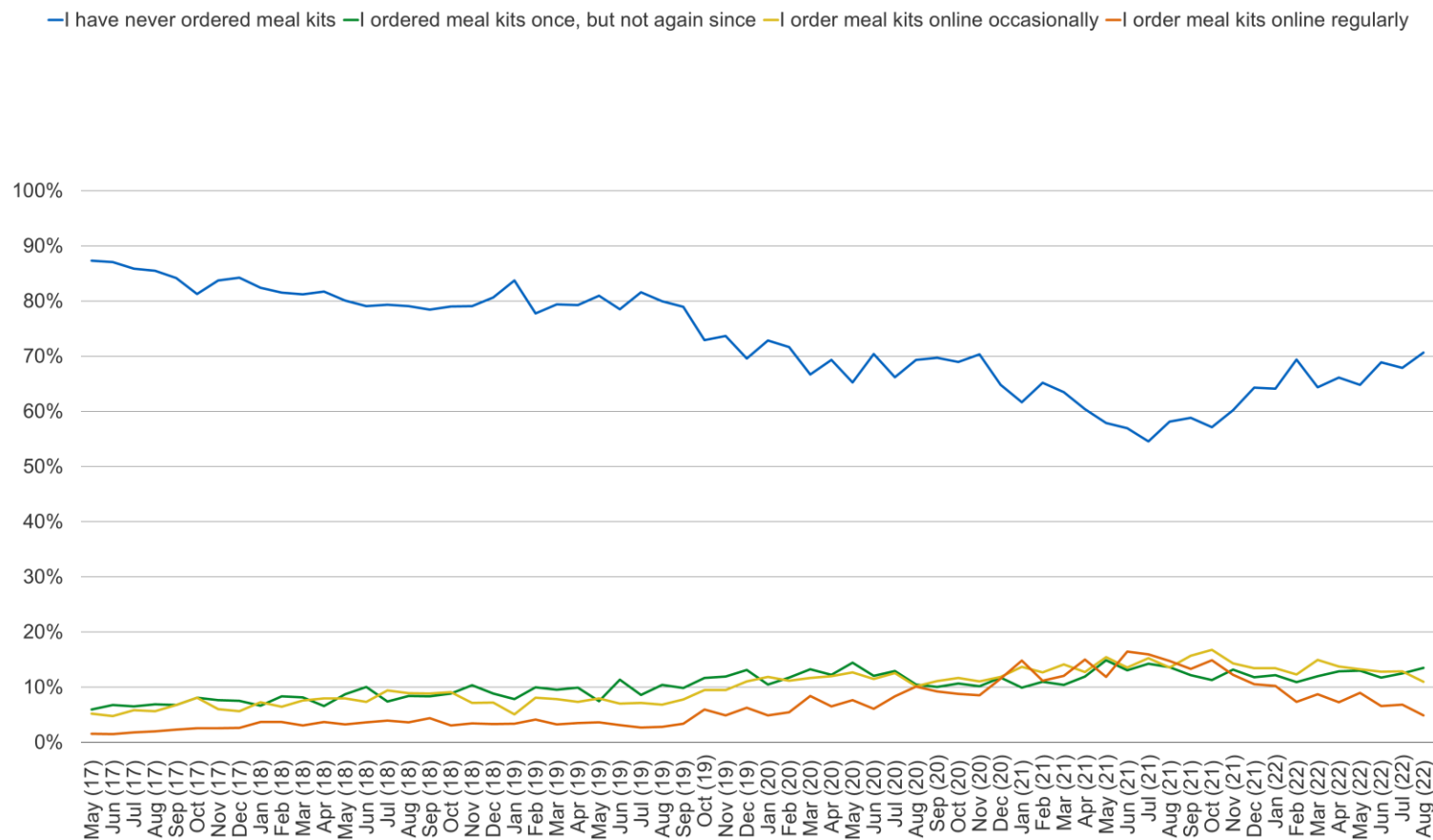
Source: Monthly Survey of US Consumers

Meal Kits Ordering In General

After gaining share for a number of months, consumer participation in meal kits ordering has reversed trend and has been worsening in recent months...

Please characterize your experience with ordering meal kits online:

Posed to all respondents.



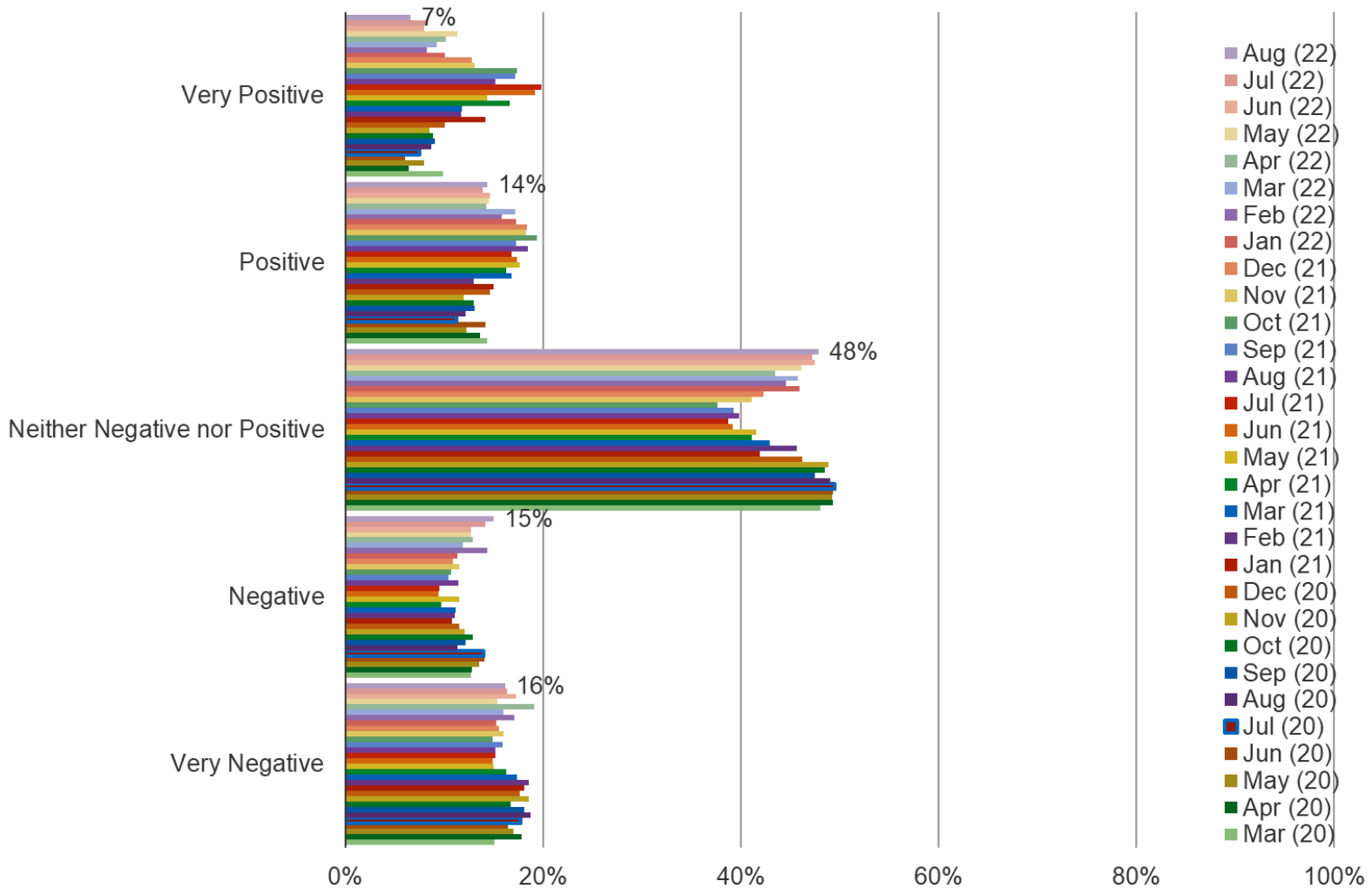
Source: Monthly Survey of US Consumers

Online Dating Sentiment

Sentiment toward online dating platforms has fluctuated over time in our survey, more recently ceding gains made in 2021...

What is your opinion of online dating apps/sites?

Posed to all respondents.



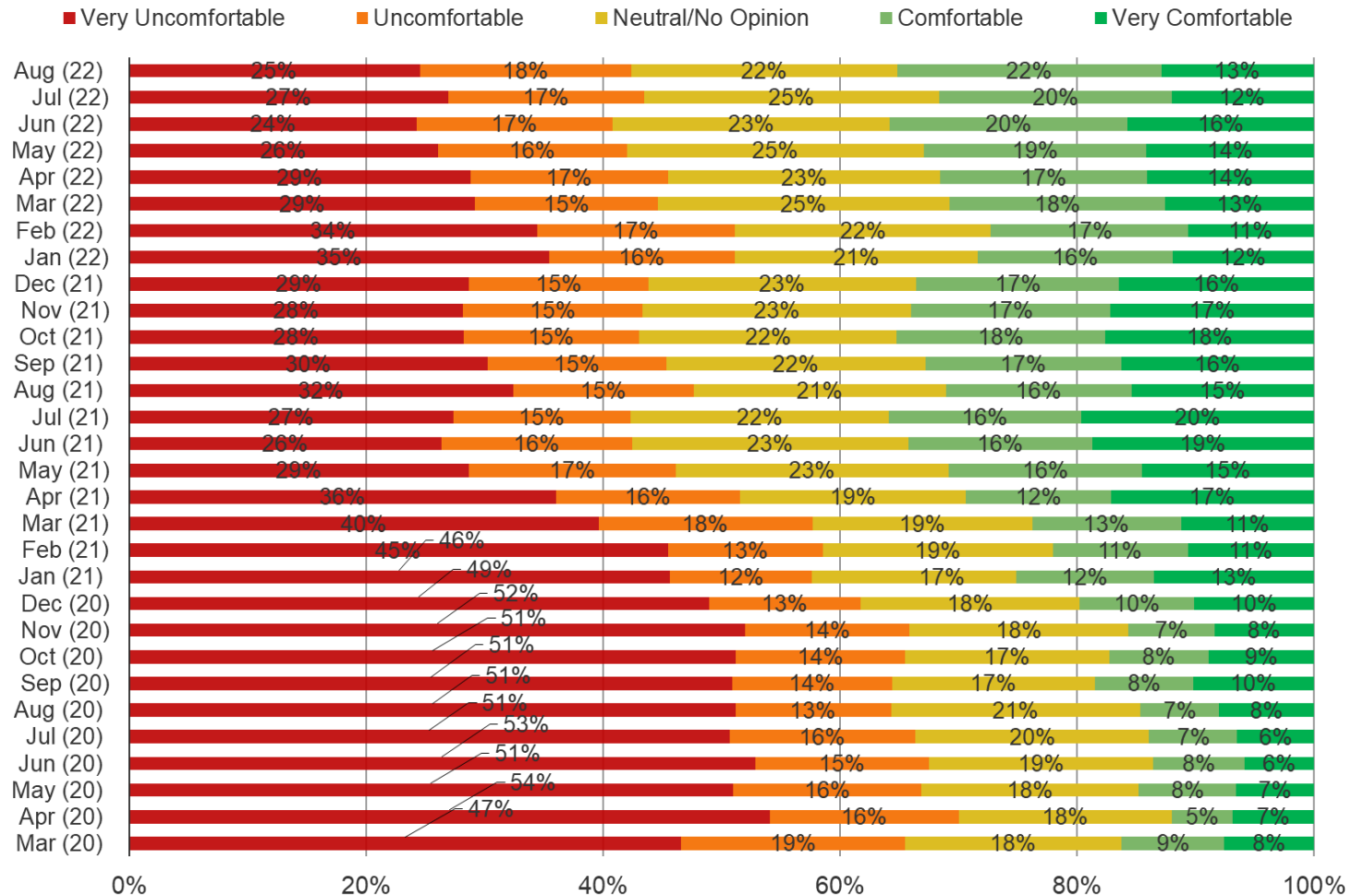
Source: Monthly Survey of US Consumers

Cruises Sentiment

The percentage of consumers who would feel uncomfortable going on a cruise today has declined in recent months...

How comfortable would you feel going on a cruise today?

Posed to all respondents.



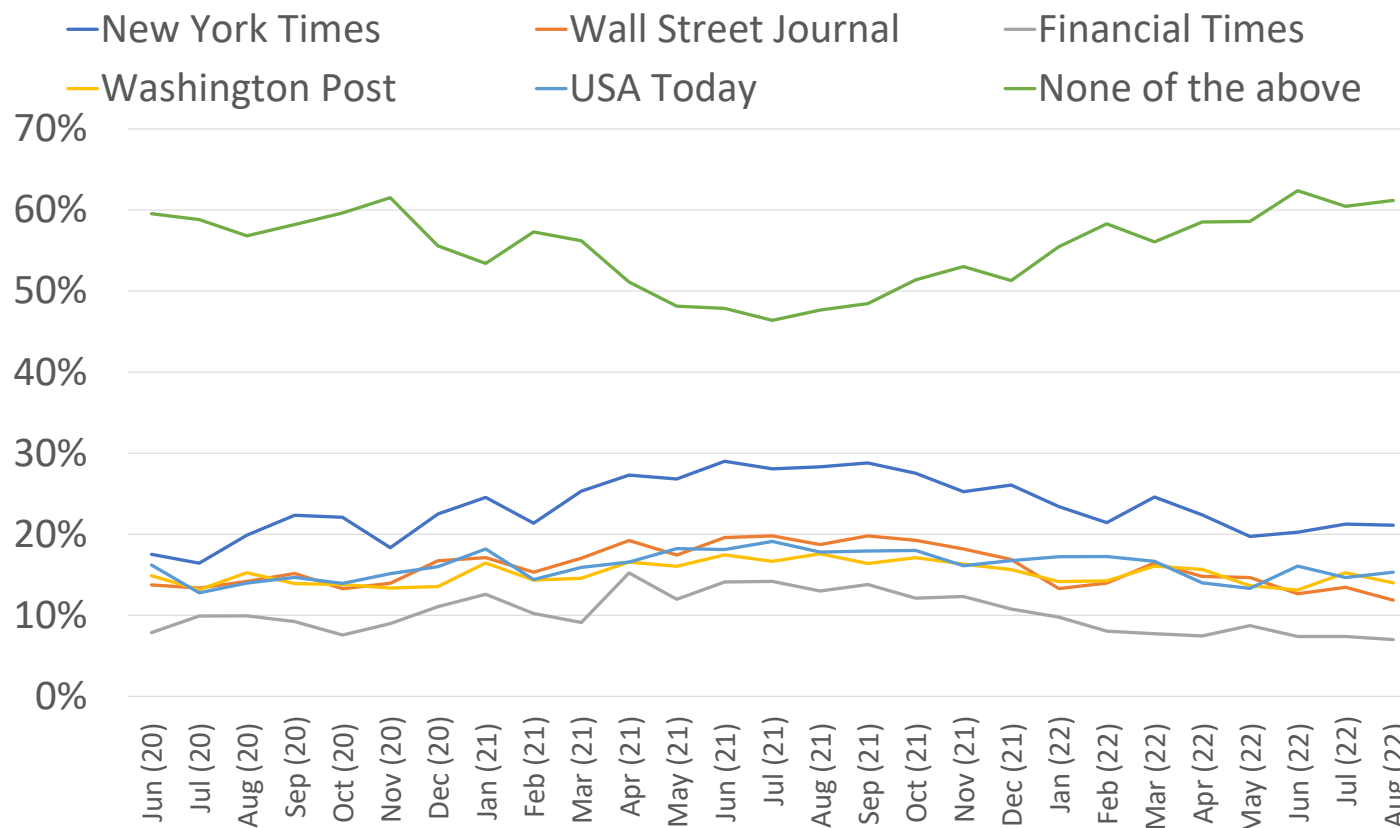
Source: Monthly Survey of US Consumers

News Platform Engagement

Following a period in which readership increased across platforms, the percentage of respondents regularly reading an array of news platforms has declined in 2022...

Which of the following do you read regularly or occasionally?

Posed to all respondents.



Source: Monthly Survey of US Consumers

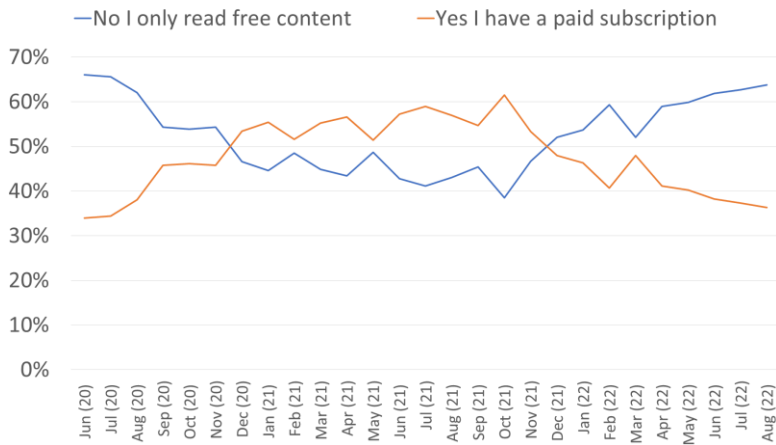
Paid News Subscriptions

Of those who read the New York Times, WSJ, and Washington Post, the share who report only reading free content has increased while the percentage who has a paid subscription has declined...

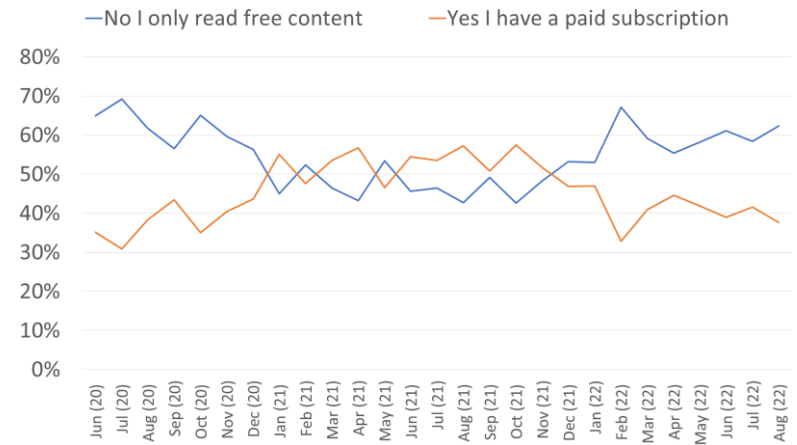
Do you currently have a paid subscription with any of the following?

Posed to all respondents who said they read each of the following.

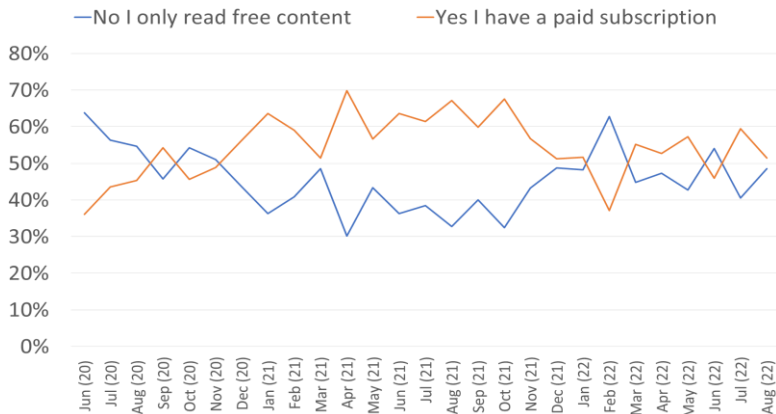
New York Times (n=296)



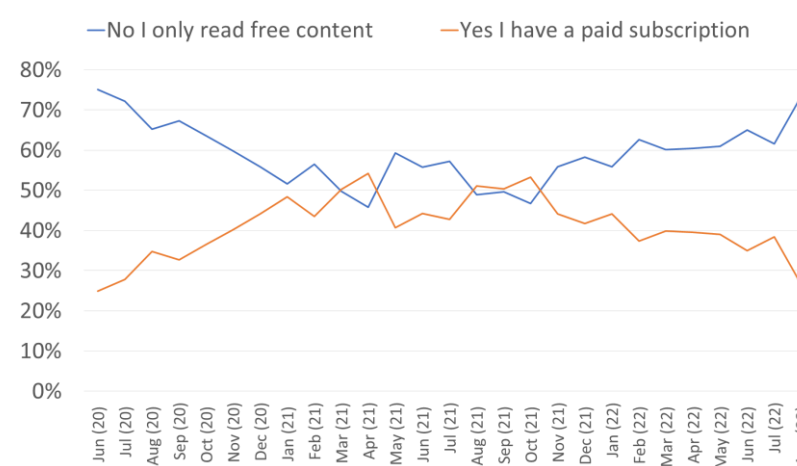
Wall Street Journal (n=220)



Financial Times (n=131)



Washington Post (n=205)



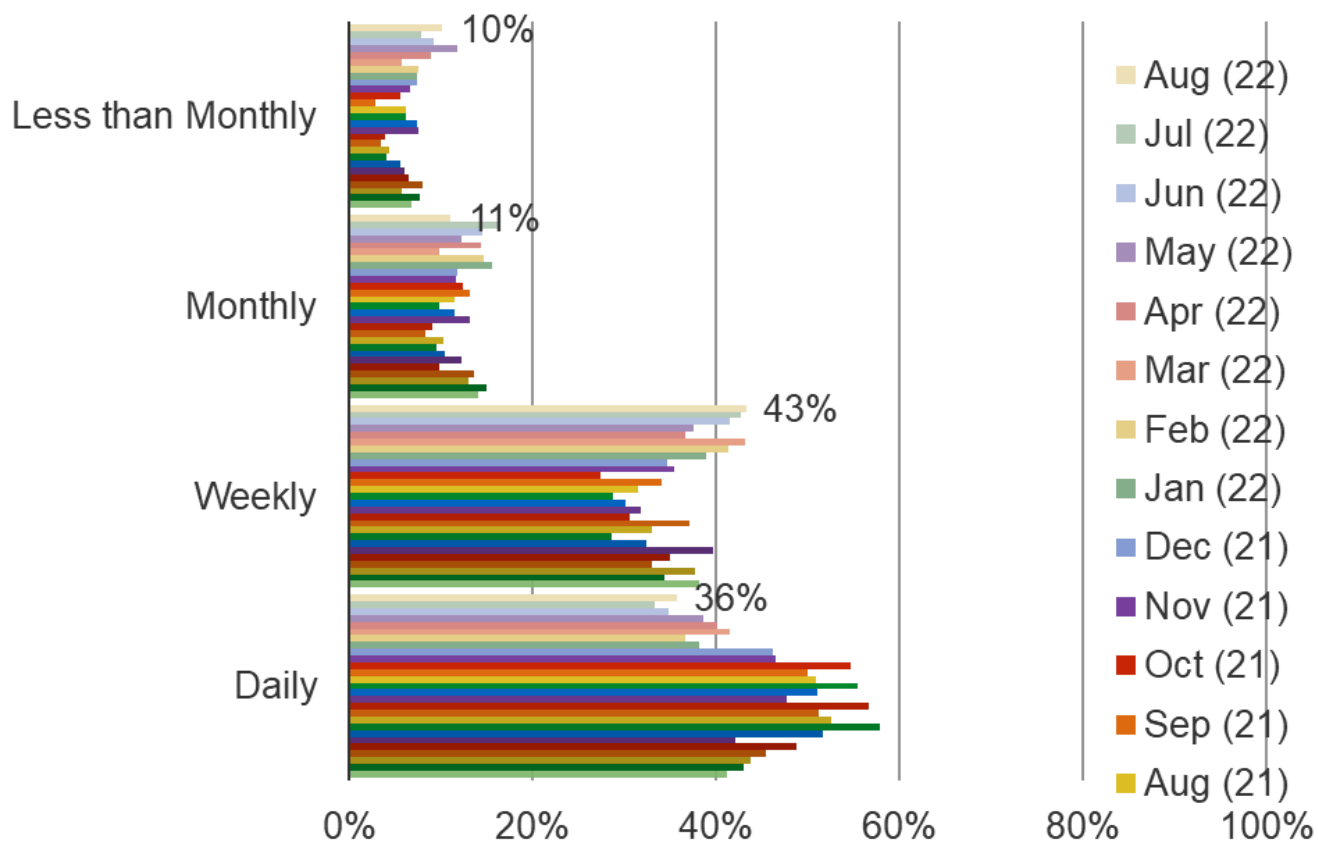
Source: Monthly Survey of US Consumers

NYT Engagement

The percentage of NYT readers who read the publication daily has softened in recent months...

How often do you read the following:

Posed to all respondents who said they read the New York Time (N = 296)

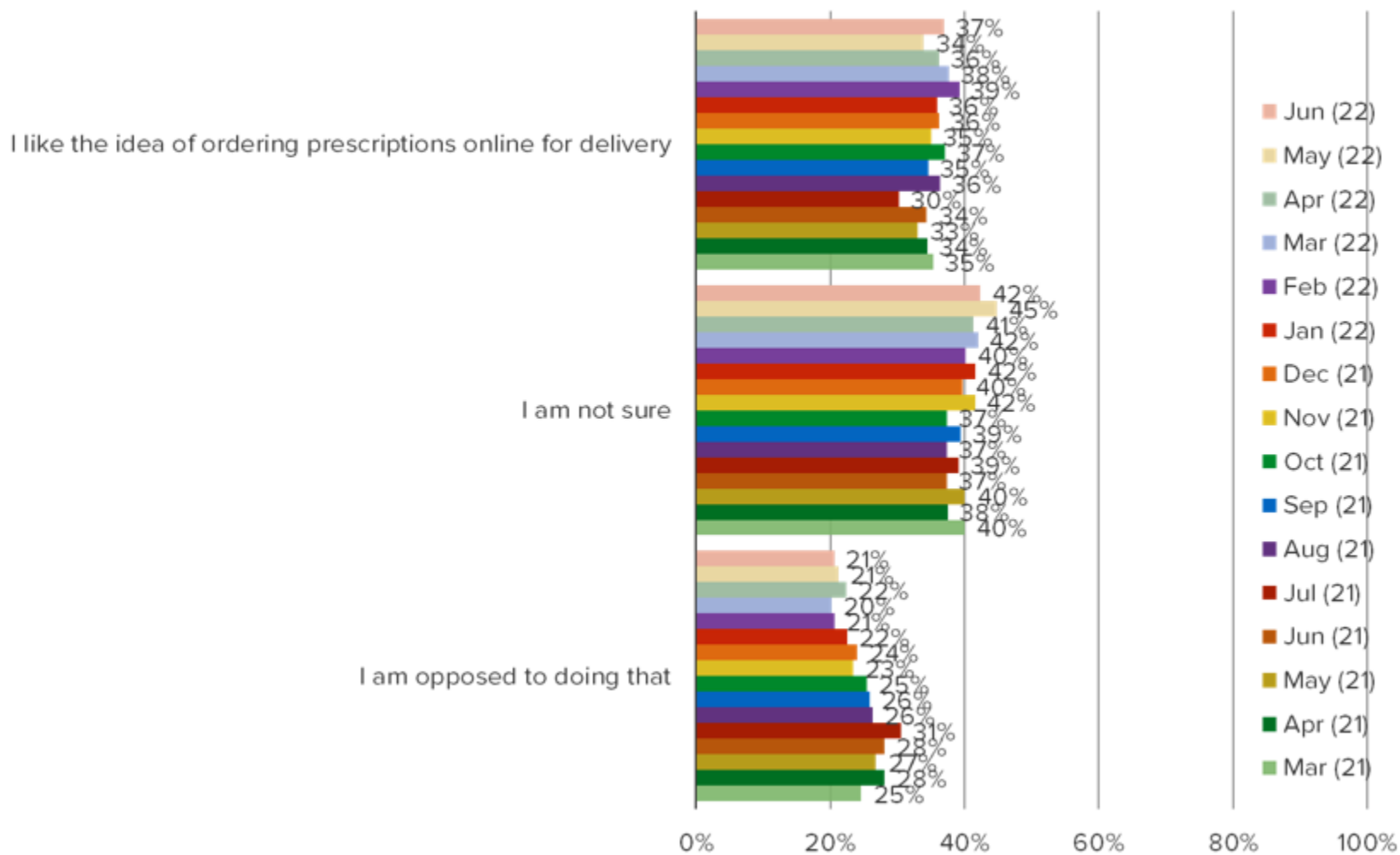


Source: Monthly Survey of US Consumers

Online Pharmacy

Consumers are increasingly open to the idea of ordering prescriptions through an online pharmacy...

How open would you be to ordering prescriptions through an online pharmacy?
Posed to respondents.

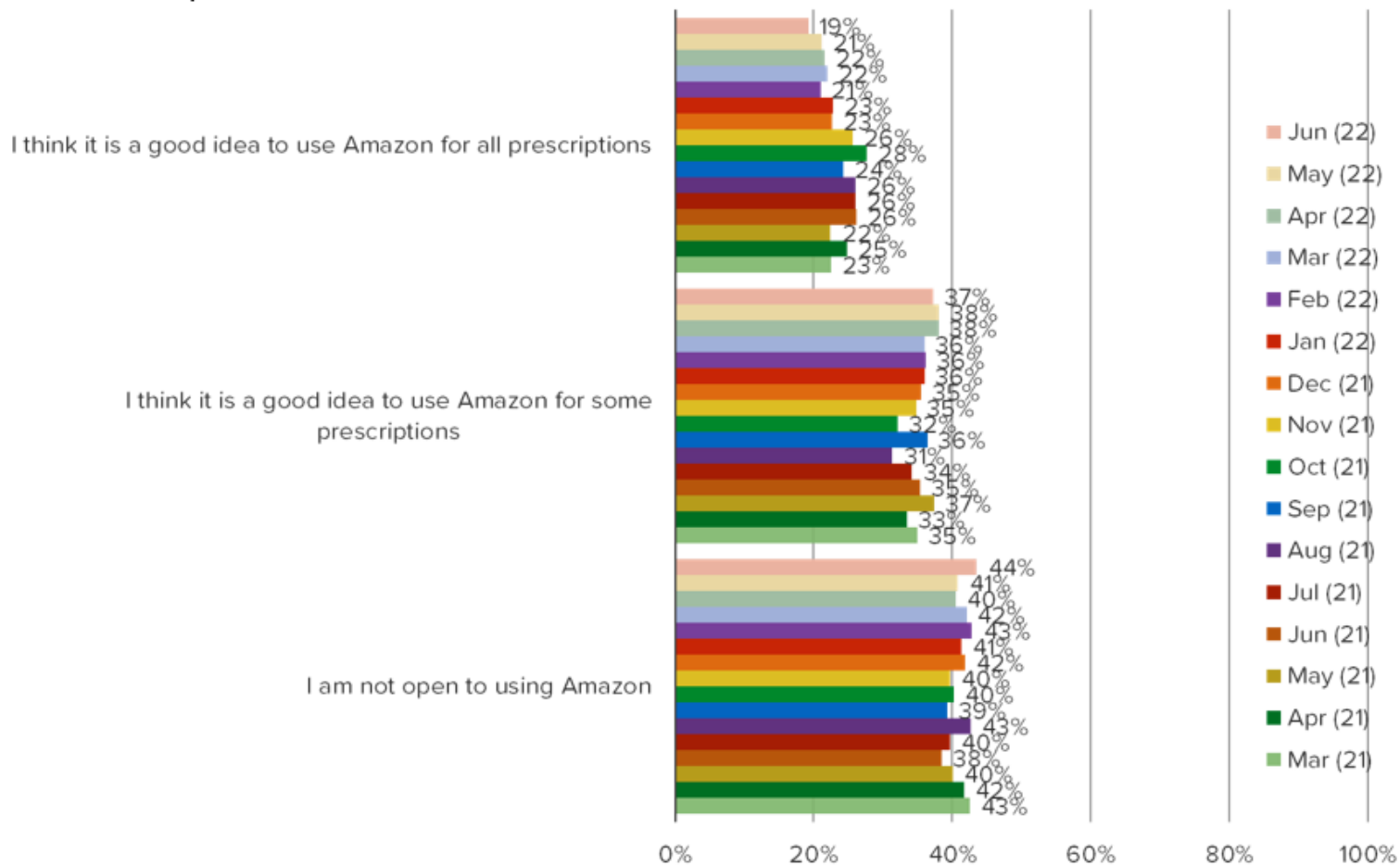


Source: Monthly Survey of US Consumers

Amazon as a Pharmacy

But they have been less likely over time to say they think it is a good idea to use Amazon for all prescriptions...

How open would you be to using Amazon as your pharmacy for prescriptions?
Posed to respondents.



Source: Monthly Survey of US Consumers