Consumer Rage and Love

Volume 3 | Quarterly Survey
1,000+ US Consumers Balanced To Census
Tickers Covered: TMT, Internet, Consumer

Key Takeaways:

❑ Around 10% of respondents report that they are avoiding one or more brands because they upset with them for one reason or another. Top brands mentioned on this front by those who are upset and avoiding include: Bud Light, Target, Starbucks, Disney, and Instacart.

❑ Demographically speaking, respondents who currently are upset with + avoiding brands are a touch older in age and are from higher income bands compared to the overall population. Geographically, they over-index to middle Atlantic states.

❑ Turning to nice-to-have's vs. need-to-have's, consumers pulled back slightly in our January wave in their opinion of spending money across discretionary categories that we ask about.

❑ Categories that consumers are most likely to view as need-to-haves: automobiles, streaming video platforms, travel/vacation, tobacco, and buying new footwear.

❑ Categories that consumers are most likely to view as nice-to-haves: online dating platforms, satellite radio, food delivery apps, concerts, and ride hailing apps.

❑ We asked a blend of questions designed to measure brand connectivity (positive sentiments, pain if removed, number of friends/peers using it, etc). We asked these questions in a few of our recent TMT / internet surveys.

❑ Brands that stood out as having very strong ties to those who are either aware of or active users of each platform (to control for brands with greater consumer awareness outperforming solely by virtue of being recognized by more people)… YouTube, Amazon, Netflix, Roku, Facebook, with mixed commentary on the likes of TikTok and Instagram.

CONSUMER RAGE

ARE THERE ANY BRANDS THAT YOU HAVE BEEN AVOIDING BECAUSE THEY UPSET YOU RECENTLY FOR ONE REASON OR ANOTHER?

Posed to all respondents.

Bar chart	Value
Jan (24)	9.4%
Oct (23)	9.2%
Jul (23)	10.3%
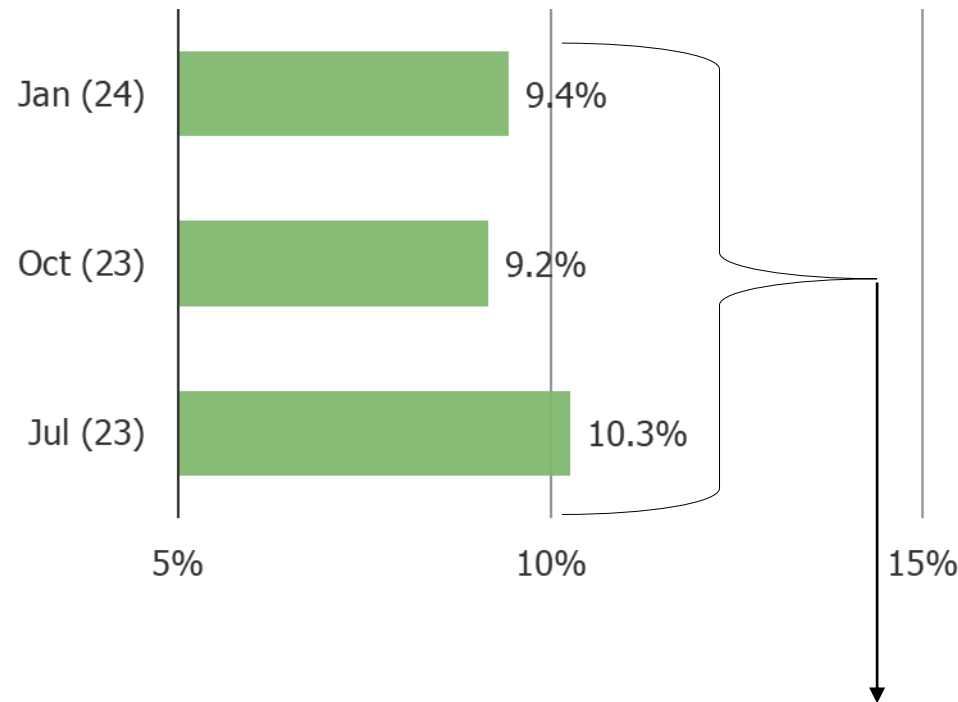
Number of Mentions…

Brand	Mentions
BudLight	35
Target	24
Starbucks	19
Disney	12
Instacart	11
Chickfila	9
Amazon	8
Mcdonalds	8
Uber	8
Nike	6
Walmart	6
Dominos	5
Doordash	5
HobbyLobby	4
Mypillow	4
Apple	3
GrubHub	3
Ubereats	3
BenandJerrys	2
CocaCola	2
Goya	2

WHAT IS YOUR AGE?

Cross tab: all respondents vs. respondents who are avoiding a brand because they upset them.

■ All Respondents
■ Respondents Who Are Upset

Age	All Respondents	Respondents Who Are Upset
75 or older	4.4%	4.5%
65 to 74	8.7%	10.0%
55 to 64	15.3%	14.9%
45 to 54	15.1%	18.1%
35 to 44	20.5%	17.7%
25 to 34	24.3%	24.9%
18 to 24	11.7%	10.0%
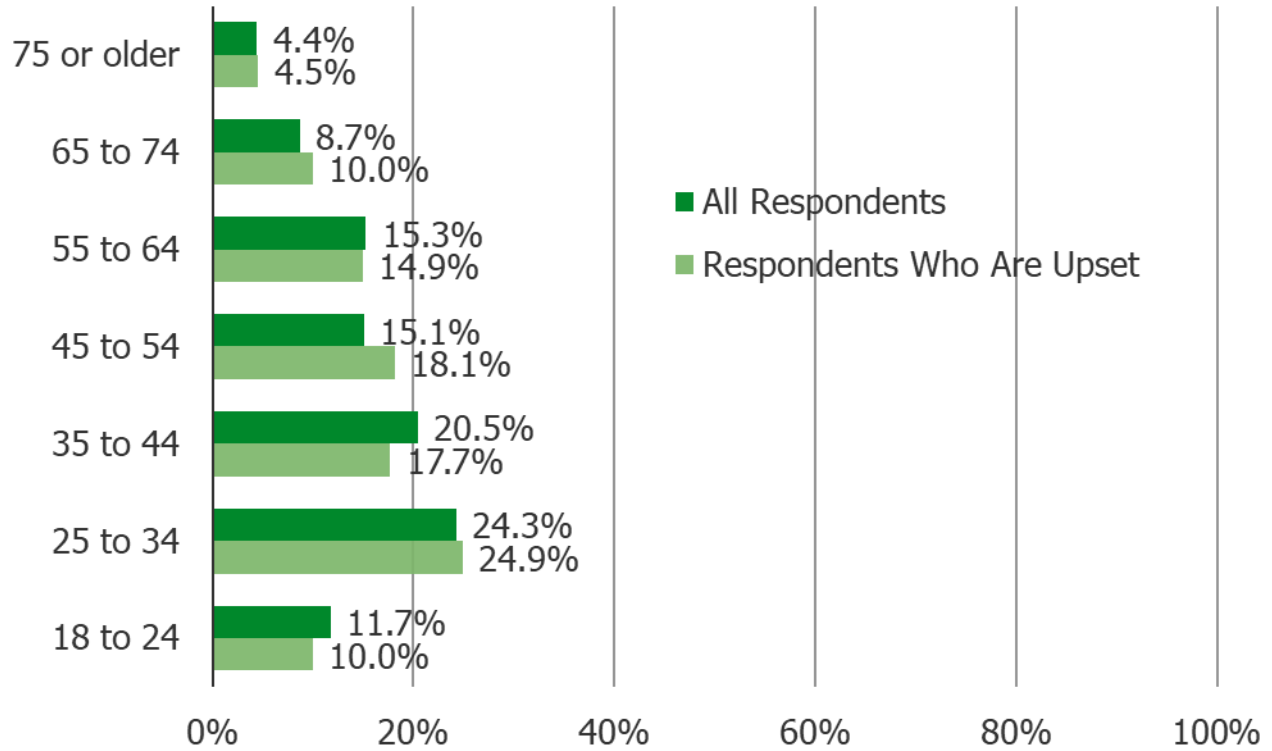
HOW OFTEN DO YOU DRINK COFFEE?

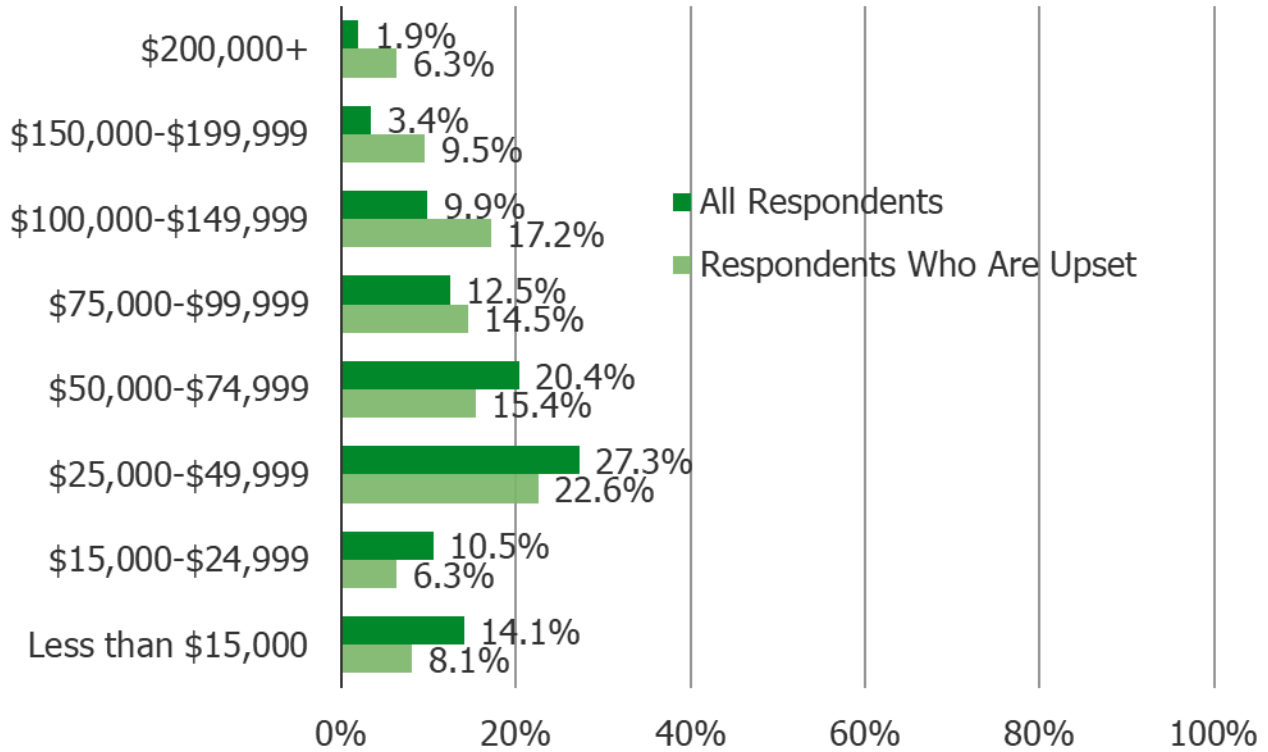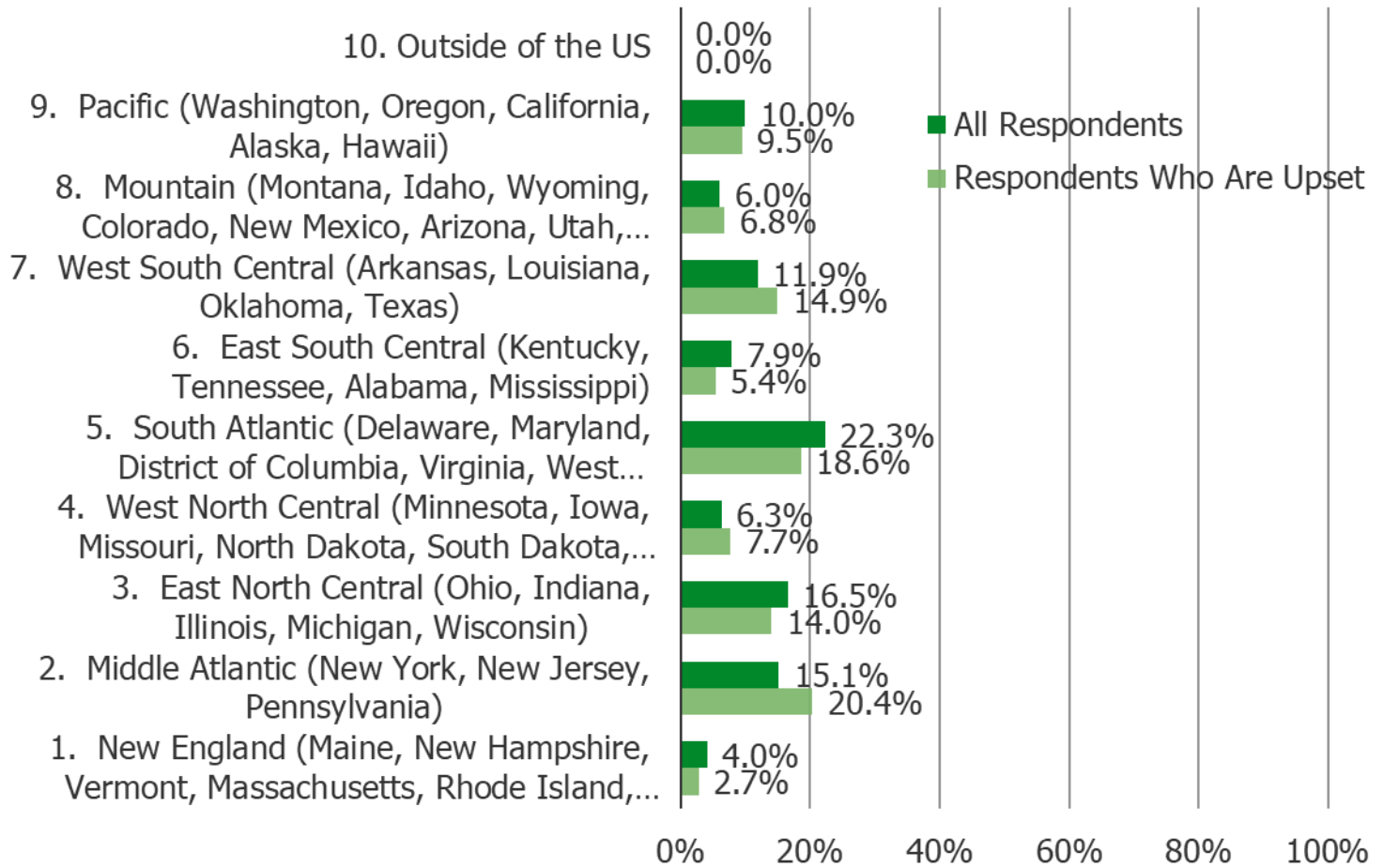Cross tab: all respondents vs. respondents who are avoiding a brand because they upset them.

HOW OFTEN DO YOU DRINK COFFEE?

Cross tab: all respondents vs. respondents who are avoiding a brand because they upset them.

Region	All Respondents	Respondents Who Are Upset
10. Outside of the US	0.0%	0.0%
9. Pacific (Washington, Oregon, California, Alaska, Hawaii)	10.0%	9.5%
8. Mountain (Montana, Idaho, Wyoming, Colorado, New Mexico, Arizona, Utah,…)	6.0%	6.8%
7. West South Central (Arkansas, Louisiana, Oklahoma, Texas)	11.9%	14.9%
6. East South Central (Kentucky, Tennessee, Alabama, Mississippi)	7.9%	5.4%
5. South Atlantic (Delaware, Maryland, District of Columbia, Virginia, West…)	22.3%	18.6%
4. West North Central (Minnesota, Iowa, Missouri, North Dakota, South Dakota,…)	6.3%	7.7%
3. East North Central (Ohio, Indiana, Illinois, Michigan, Wisconsin)	16.5%	14.0%
2. Middle Atlantic (New York, New Jersey, Pennsylvania)	15.1%	20.4%
1. New England (Maine, New Hampshire, Vermont, Massachusetts, Rhode Island,…)	4.0%	2.7%

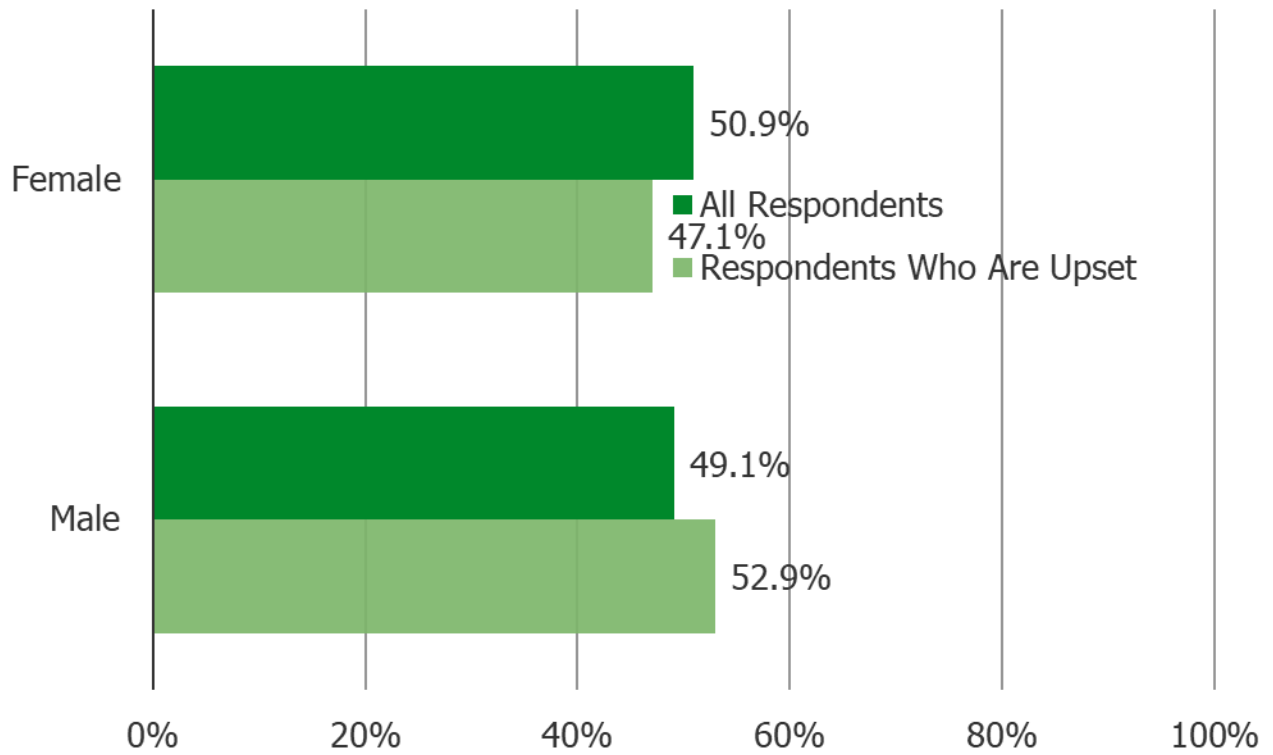## HOW OFTEN DO YOU DRINK COFFEE?

Cross tab: all respondents vs. respondents who are avoiding a brand because they upset them.
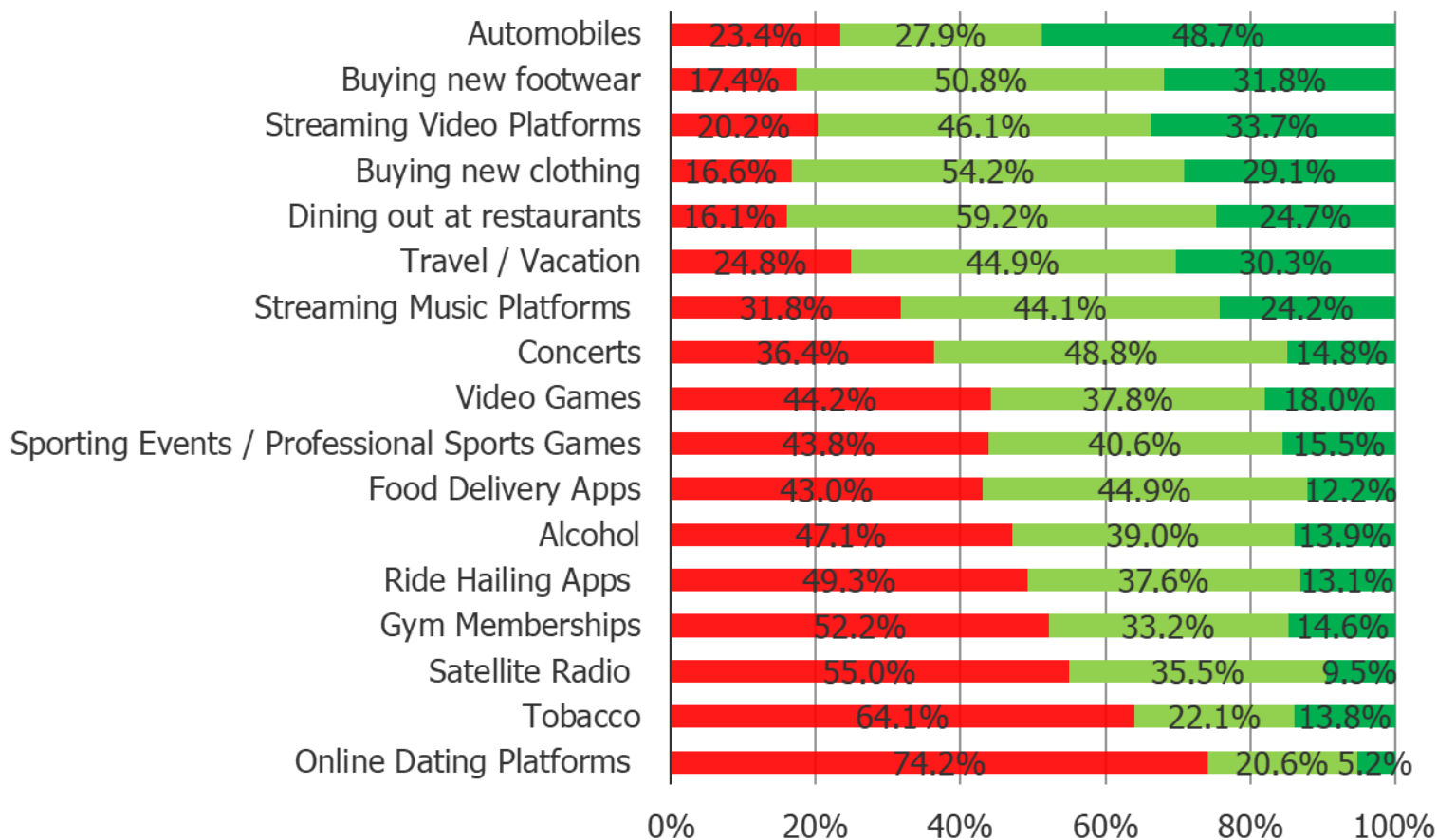
NICE TO HAVE VS. NEED TO HAVE

WHAT IS YOUR OPINION OF SPENDING MONEY ON THE FOLLOWING...

Posed to all respondents

Legend: ■ No Interest ■ Nice to Have, But Not Necessary ■ Absolutely Necessary

Category	No Interest	Nice to Have, But Not Necessary	Absolutely Necessary
Automobiles	23.4%	27.9%	48.7%
Buying new footwear	17.4%	50.8%	31.8%
Streaming Video Platforms	20.2%	46.1%	33.7%
Buying new clothing	16.6%	54.2%	29.1%
Dining out at restaurants	16.1%	59.2%	24.7%
Travel / Vacation	24.8%	44.9%	30.3%
Streaming Music Platforms	31.8%	44.1%	24.2%
Concerts	36.4%	48.8%	14.8%
Video Games	44.2%	37.8%	18.0%
Sporting Events / Professional Sports Games	43.8%	40.6%	15.5%
Food Delivery Apps	43.0%	44.9%	12.2%
Alcohol	47.1%	39.0%	13.9%
Ride Hailing Apps	49.3%	37.6%	13.1%
Gym Memberships	52.2%	33.2%	14.6%
Satellite Radio	55.0%	35.5%	9.5%
Tobacco	64.1%	22.1%	13.8%
Online Dating Platforms	74.2%	20.6%	5.2%

WHAT IS YOUR OPINION OF SPENDING MONEY ON THE FOLLOWING...

Posed to all respondents (EXCLUDING PEOPLE WHO HAVE NO INTEREST IN EACH)
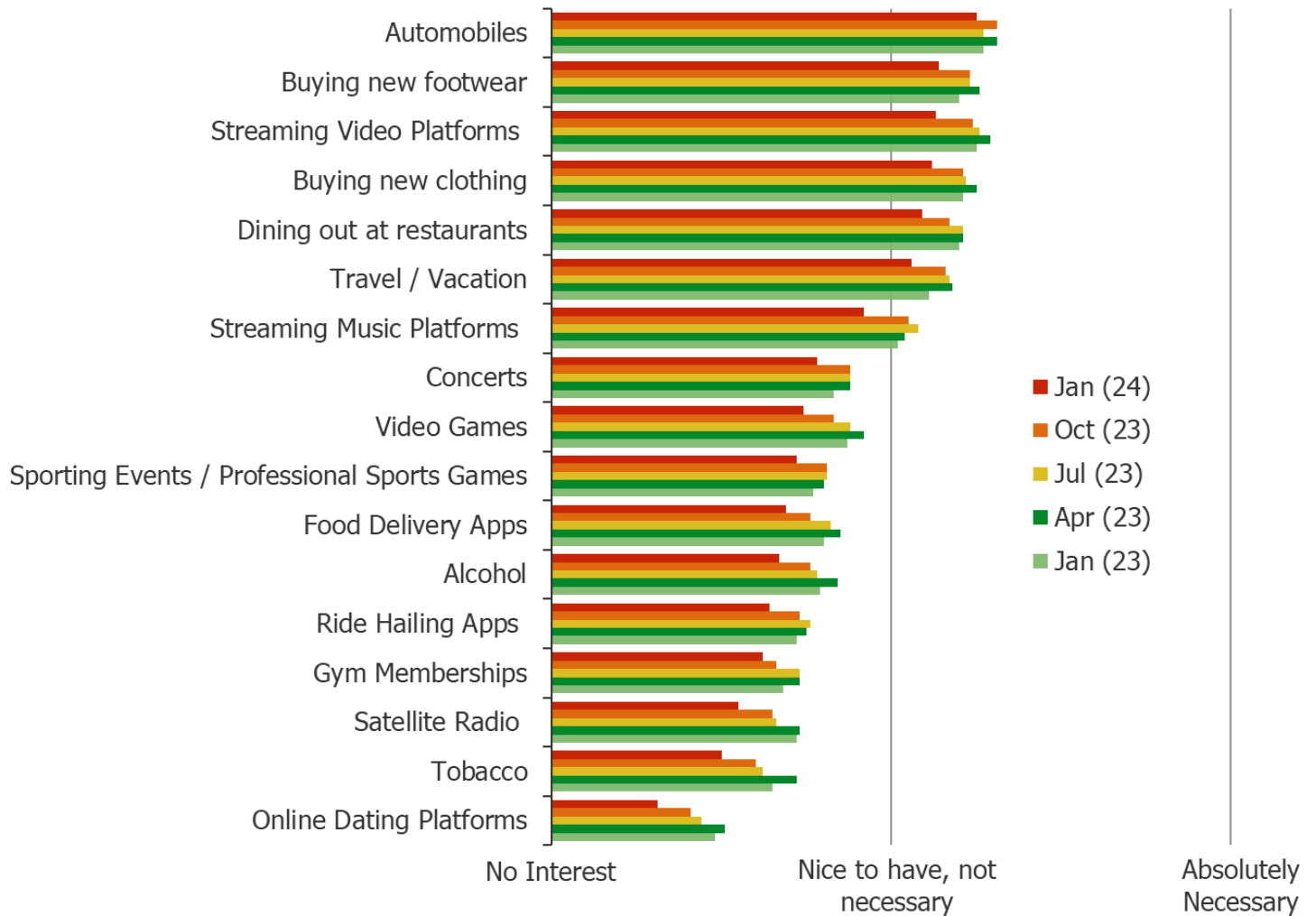
Legend: ■ Nice to Have, But Not Necessary ■ Absolutely Necessary

Category	Nice to Have, But Not Necessary	Absolutely Necessary
Automobiles	36%	64%
Streaming Video Platforms	58%	42%
Travel / Vacation	60%	40%
Tobacco	61%	39%
Buying new footwear	61%	39%
Streaming Music Platforms	65%	35%
Buying new clothing	65%	35%
Video Games	68%	32%
Gym Memberships	69%	31%
Dining out at restaurants	71%	29%
Sporting Events / Professional Sports Games	72%	28%
Alcohol	74%	26%
Ride Hailing Apps	74%	26%
Concerts	77%	23%
Food Delivery Apps	79%	21%
Satellite Radio	79%	21%
Online Dating Platforms	80%	20%

WHAT IS YOUR OPINION OF SPENDING MONEY ON THE FOLLOWING...

Posed to all respondents

Legend:
- Jan (24)
- Oct (23)
- Jul (23)
- Apr (23)
- Jan (23)

X-axis: No Interest — Nice to have, not necessary — Absolutely Necessary

Categories (top to bottom):
- Automobiles
- Buying new footwear
- Streaming Video Platforms
- Buying new clothing
- Dining out at restaurants
- Travel / Vacation
- Streaming Music Platforms
- Concerts
- Video Games
- Sporting Events / Professional Sports Games
- Food Delivery Apps
- Alcohol
- Ride Hailing Apps
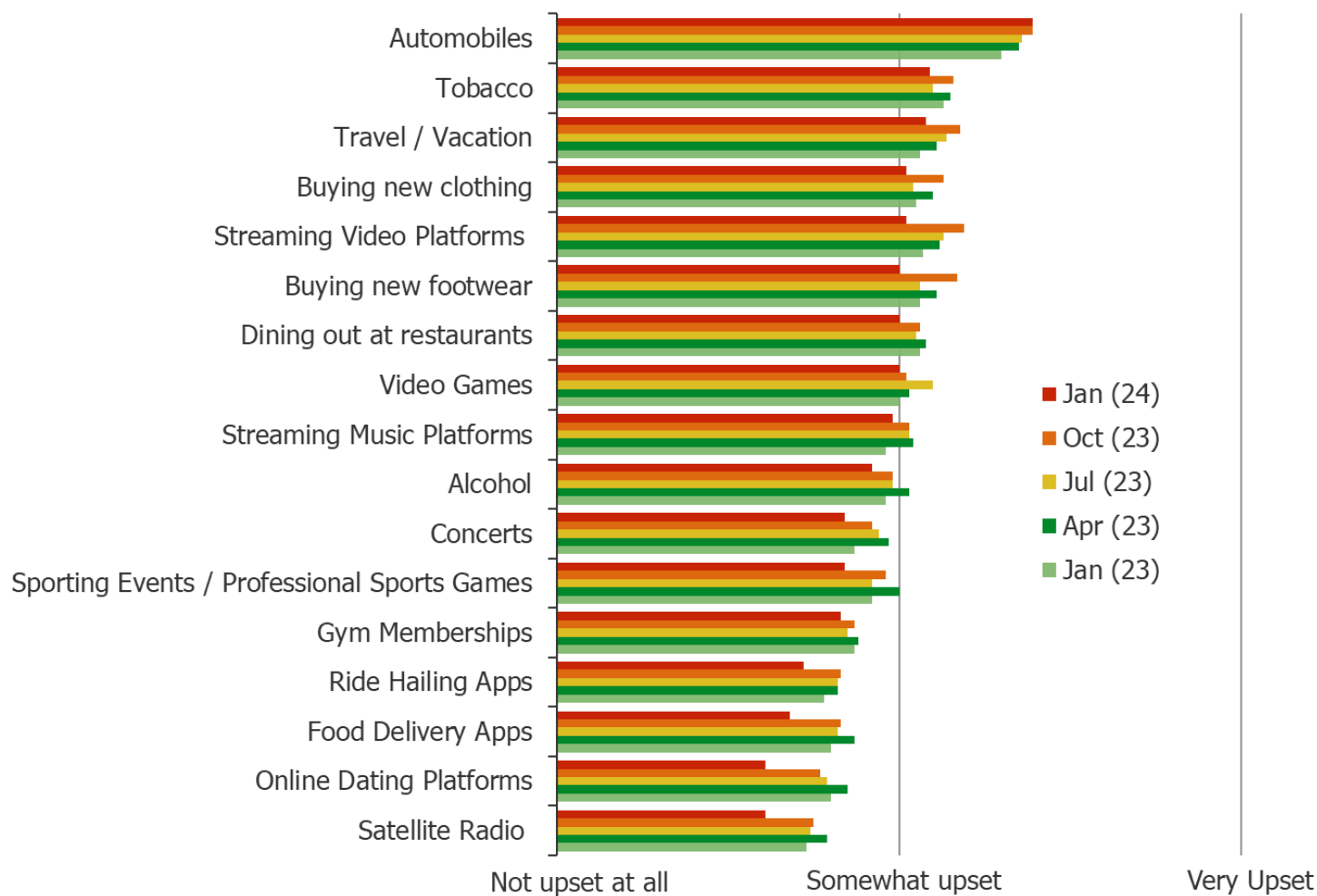- Gym Memberships
- Satellite Radio
- Tobacco
- Online Dating Platforms

WHAT IS YOUR OPINION OF SPENDING MONEY ON THE FOLLOWING...

Posed to all respondents (% who said absolutely necessary each month)

Category	Jan (24)
Automobiles	48.7%
Streaming Video Platforms	33.7%
Buying new footwear	31.9%
Travel / Vacation	30.3%
Buying new clothing	29.1%
Dining out at restaurants	24.7%
Streaming Music Platforms	24.2%
Video Games	18.0%
Sporting Events / Professional Sports Games	15.5%
Concerts	14.8%
Gym Memberships	14.6%
Alcohol	13.9%
Tobacco	13.8%
Ride Hailing Apps	13.1%
Food Delivery Apps	12.2%
Satellite Radio	9.5%
Online Dating Platforms	5.2%

Legend: Jan (24), Oct (23), Jul (23), Apr (23), Jan (23)

HOW UPSET WOULD YOU BE IF YOU LOST ACCESS TO THE FOLLOWING?

Posed to all respondents.

Legend:
- Jan (24)
- Oct (23)
- Jul (23)
- Apr (23)
- Jan (23)

X-axis: Not upset at all — Somewhat upset — Very Upset

Categories (top to bottom):
- Automobiles
- Tobacco
- Travel / Vacation
- Buying new clothing
- Streaming Video Platforms
- Buying new footwear
- Dining out at restaurants
- Video Games
- Streaming Music Platforms
- Alcohol
- Concerts
- Sporting Events / Professional Sports Games
- Gym Memberships
- Ride Hailing Apps
- Food Delivery Apps
- Online Dating Platforms
- Satellite Radio

BRAND CONNECTIVITY, CONSUMER LOVE

Online Retailers Survey

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

Legend: Jan (24)

X-axis: 0 - No Negative Impact, 1, 2, 3, 4, 5, 6, 7 - Extreme Negative Impat

Categories (top to bottom): Amazon, Walmart, Target, Temu, Ebay, Shein, Etsy, Wayfair, TikTok Shop, Overstock, Wish.com

Streaming Video Survey

Posed to respondents who are aware of each the below.

Legend: ■ Jan (24)

X-axis: 0 - Very Negative, 1, 2, 3, 4, 5, 6, 7, 8, 9, 10 - Very Positive

Brands (top to bottom): YouTube, Amazon Prime, Netflix, Roku, Paramount+, Disney+, HBO Max, Peacock, Youtube TV, Discovery+, ESPN, Instagram, Apple TV+, TikTok
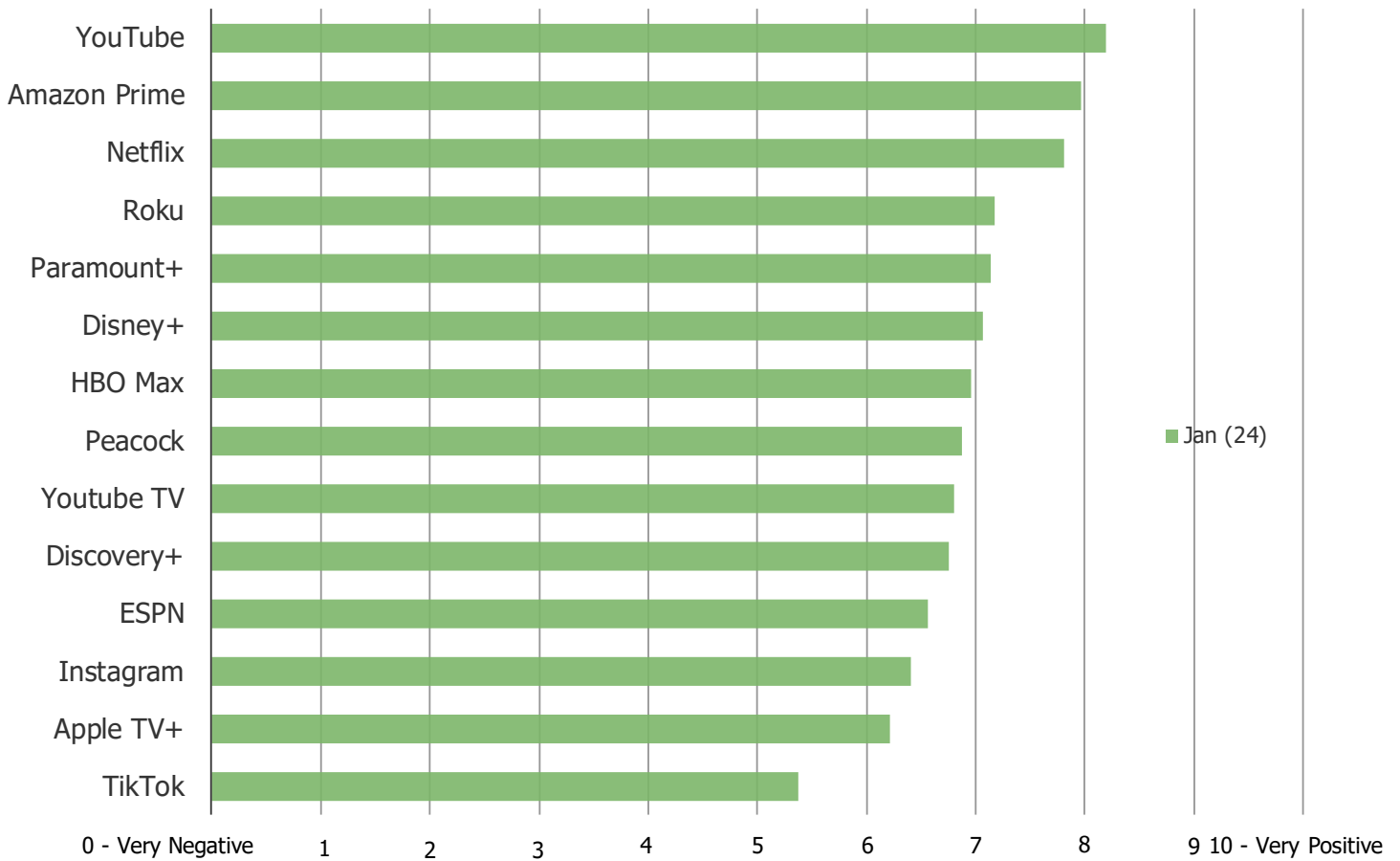
Streaming Video Survey

WHAT KIND OF AN IMPACT WOULD THERE BE ON YOUR LIFE IF THE FOLLOWING WENT OUT OF EXISTENCE TODAY?
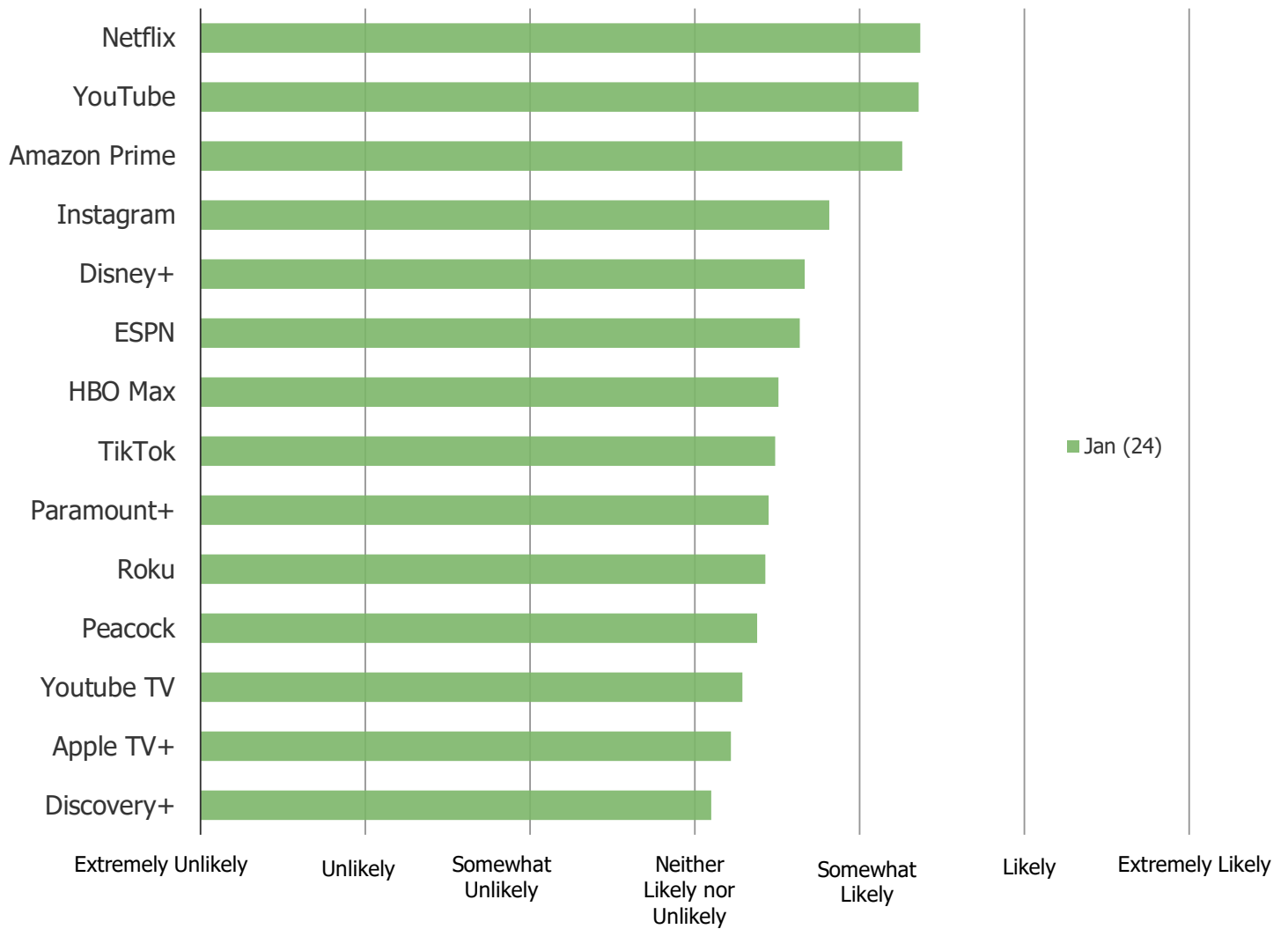
Posed to respondents who are aware of each the below.
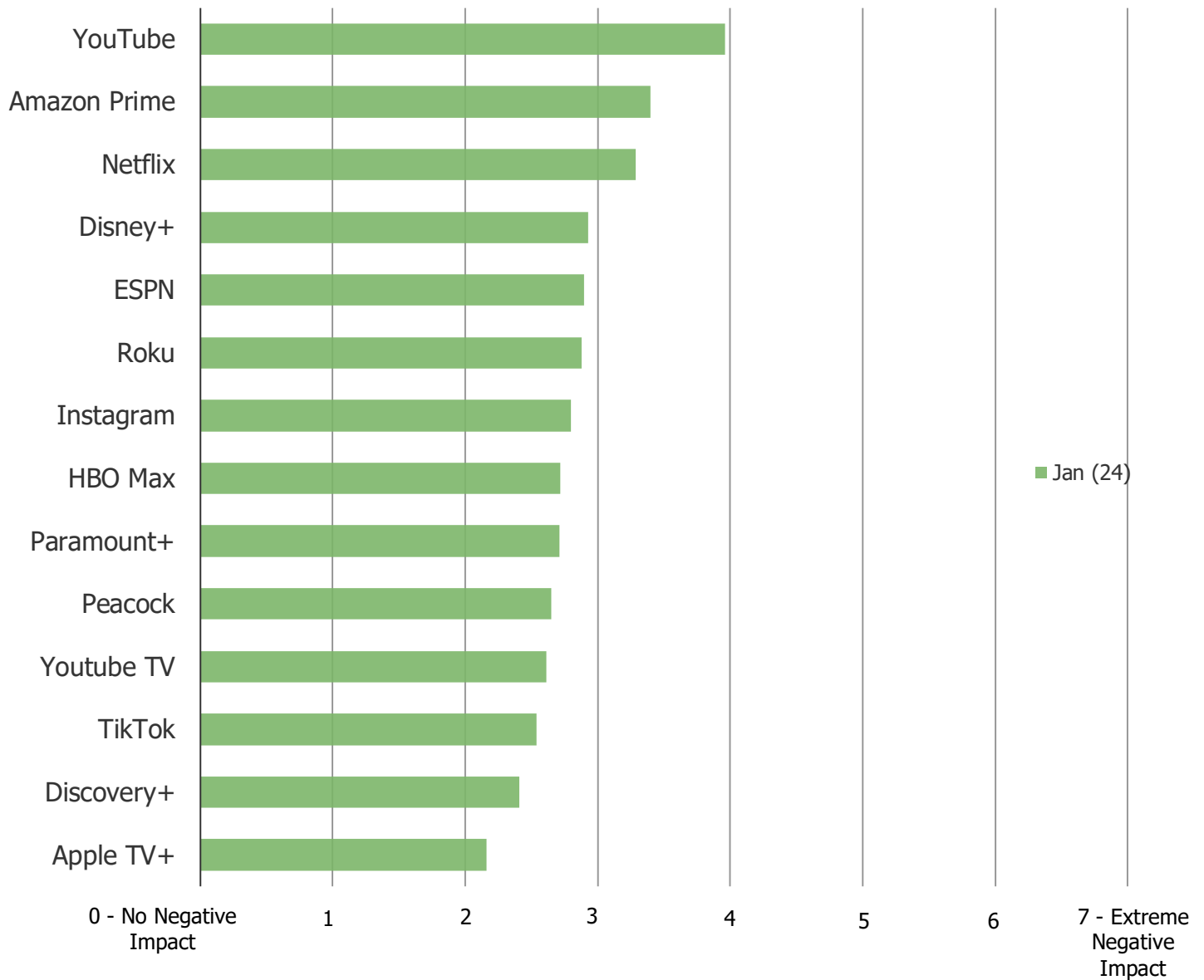
Streaming Video Survey

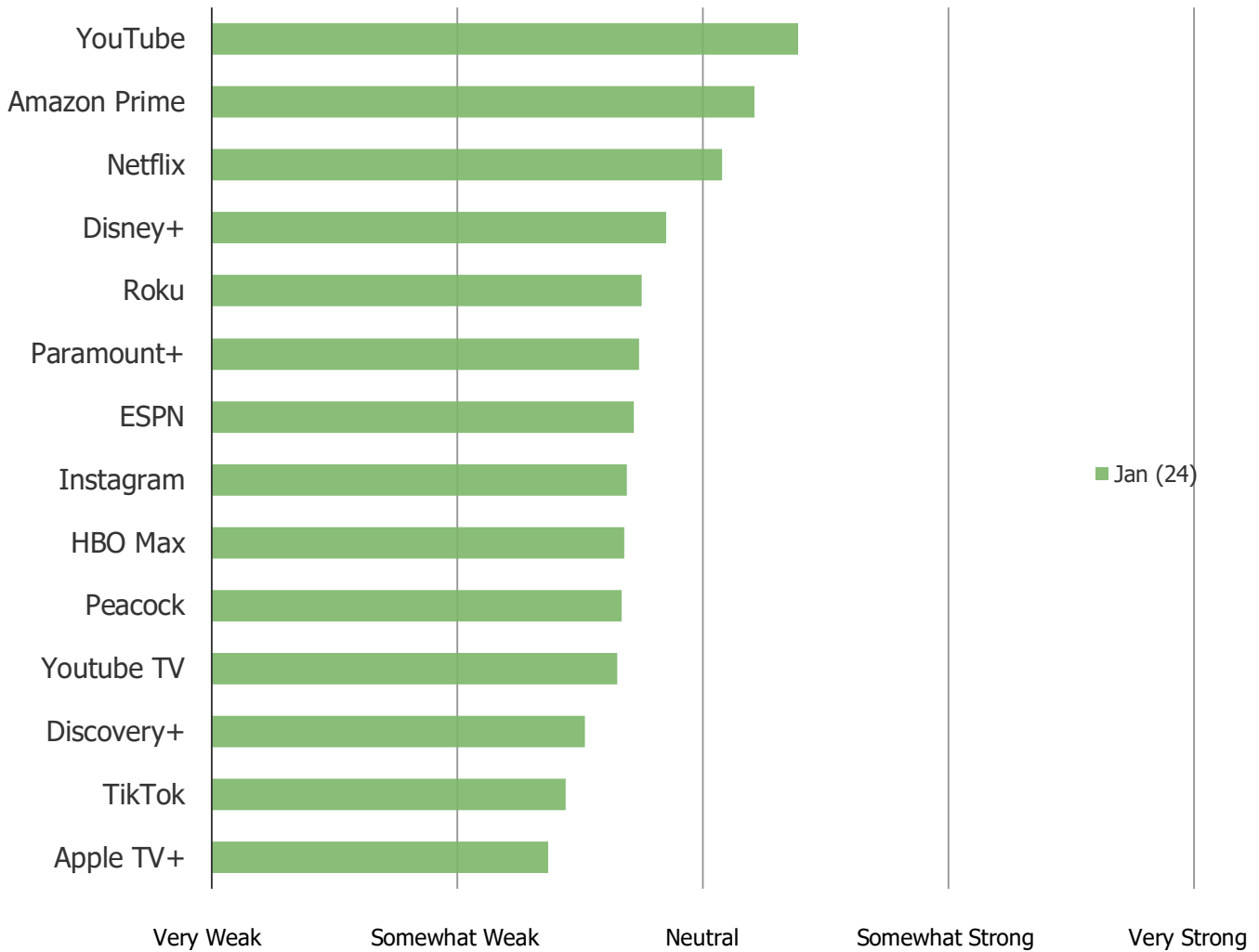HOW LIKELY ARE YOUR FRIENDS/PEERS TO BE USERS OF THE FOLLOWING?

Posed to respondents who are aware of each the below.

Netflix							
YouTube							
Amazon Prime							
Instagram							
Disney+							
ESPN							
HBO Max							
TikTok							
Paramount+							
Roku							
Peacock							
Youtube TV							
Apple TV+							
Discovery+							

■ Jan (24)

Extremely Unlikely · Unlikely · Somewhat Unlikely · Neither Likely nor Unlikely · Somewhat Likely · Likely · Extremely Likely

Streaming Video Survey

HOW MUCH OF A PERSONAL CONNECTION DO YOU FEEL WITH THE FOLLOWING BRANDS/COMPANIES?

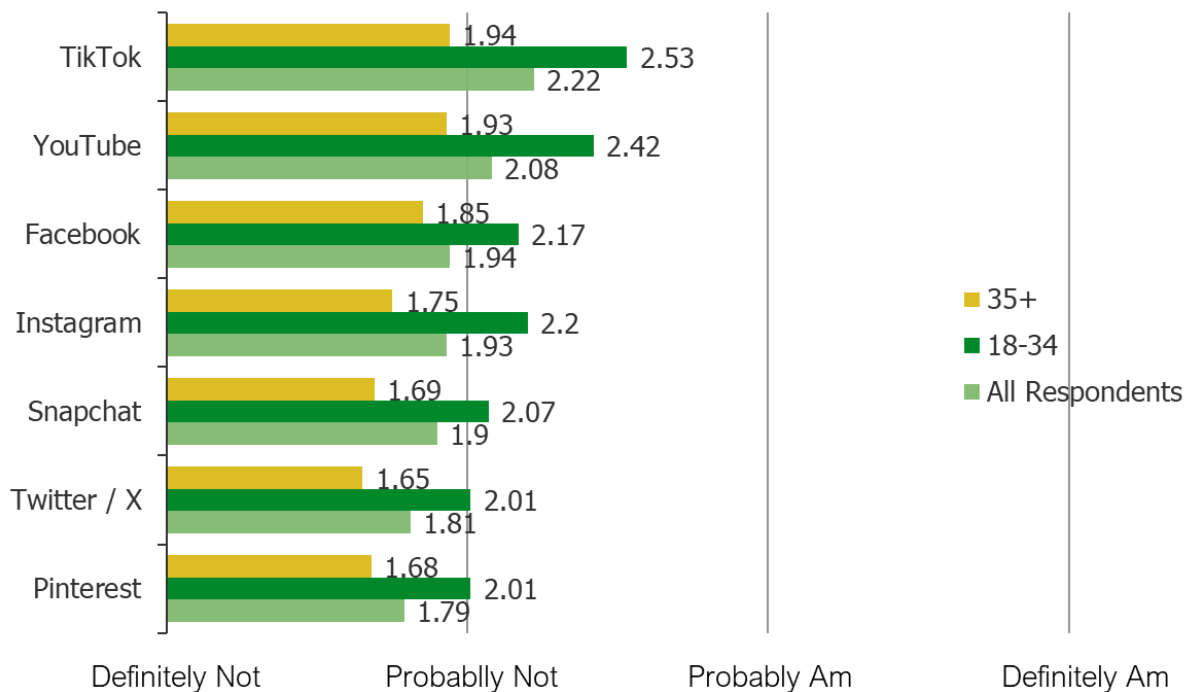Posed to respondents who are aware of each the below.

Legend: ■ Jan (24)

Categories (top to bottom): YouTube, Amazon Prime, Netflix, Disney+, Roku, Paramount+, ESPN, Instagram, HBO Max, Peacock, Youtube TV, Discovery+, TikTok, Apple TV+

Axis: Very Weak | Somewhat Weak | Neutral | Somewhat Strong | Very Strong

Social Media Survey

DO YOU FEEL LIKE YOU ARE ADDICTED TO USING THIS APP?

Posed to respondents who use each of the below.

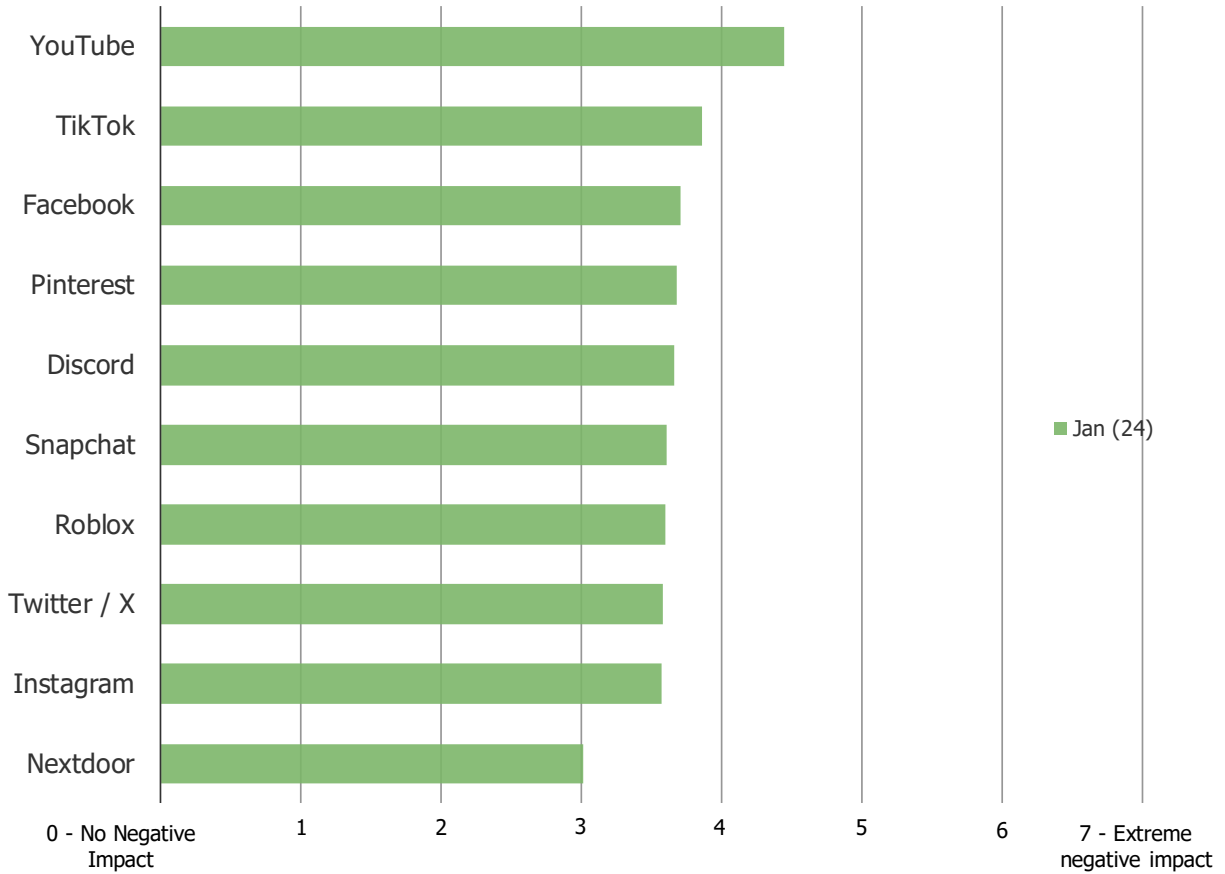Legend: ■ Definitely Not ■ Probably Not ■ Probably Am ■ Definitely Am

App	Definitely Not	Probably Not	Probably Am	Definitely Am
TikTok	40.3%	16.7%	23.7%	19.4%
YouTube	40.7%	23.6%	22.4%	13.2%
Roblox	47.3%	18.3%	19.4%	15.1%
Facebook	48.6%	20.3%	20.3%	10.9%
Instagram	46.6%	23.3%	20.2%	9.8%
Snapchat	47.0%	26.7%	15.5%	10.8%
Discord	48.5%	27.2%	15.4%	8.8%
Twitter / X	54.2%	21.5%	13.9%	10.5%
Pinterest	53.9%	22.9%	13.5%	9.7%
Nextdoor	66.3%	19.9%	8.3%	5.5%

Posed to respondents who use each of the below, age cuts.

Legend: ■ 35+ ■ 18-34 ■ All Respondents

App	35+	18-34	All Respondents
TikTok	1.94	2.53	2.22
YouTube	1.93	2.42	2.08
Facebook	1.85	2.17	1.94
Instagram	1.75	2.2	1.93
Snapchat	1.69	2.07	1.9
Twitter / X	1.65	2.01	1.81
Pinterest	1.68	2.01	1.79

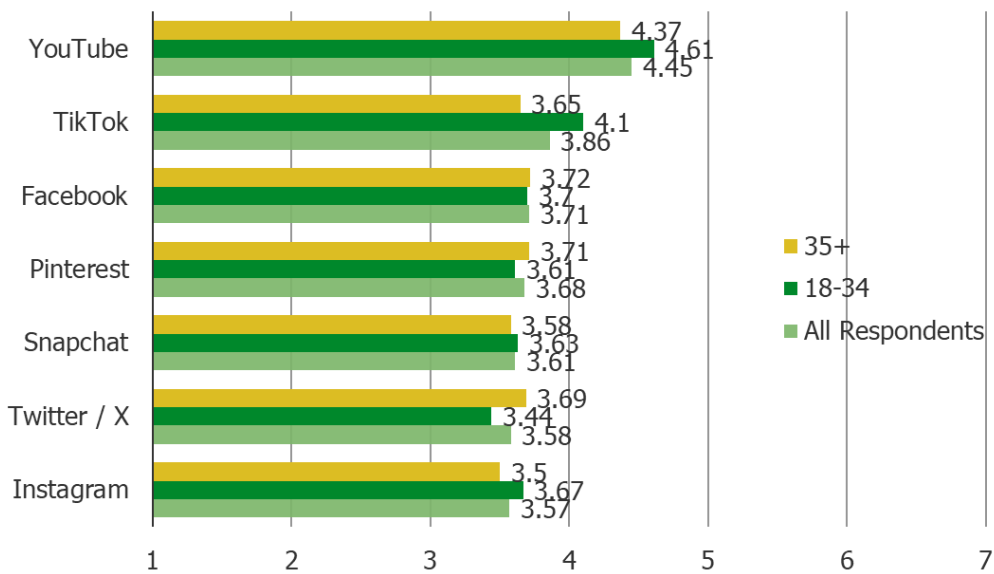Scale: Definitely Not — Probablly Not — Probably Am — Definitely Am

Social Media Survey

WHAT KIND OF AN IMPACT WOULD THERE BE ON YOUR LIFE IF THE FOLLOWING WENT OUT OF EXISTENCE?
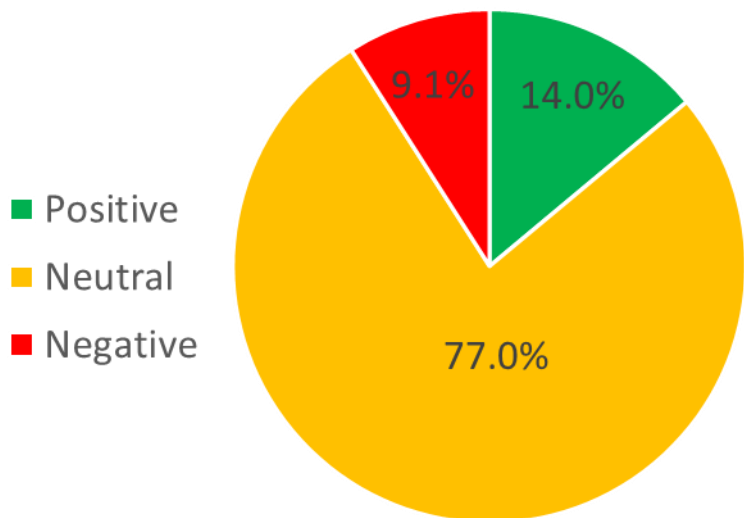
Posed to respondents who use the below.

Platform	Jan (24)
YouTube	4.45
TikTok	3.86
Facebook	3.71
Pinterest	3.68
Discord	3.67
Snapchat	3.61
Roblox	3.61
Twitter / X	3.58
Instagram	3.57
Nextdoor	3.0

Scale: 0 - No Negative Impact to 7 - Extreme negative impact

Posed to respondents who use each of the below, age cuts.

Platform	35+	18-34	All Respondents
YouTube	4.37	4.61	4.45
TikTok	3.65	4.1	3.86
Facebook	3.72	3.7	3.71
Pinterest	3.71	3.61	3.68
Snapchat	3.58	3.63	3.61
Twitter / X	3.69	3.44	3.58
Instagram	3.5	3.67	3.57

EMOTIONAL REACTION TO BRANDS

ETSY | WHEN YOU SEE THIS COMPANY/BRAND NAME, WHAT EMOTION DO YOU FEEL FIRST?
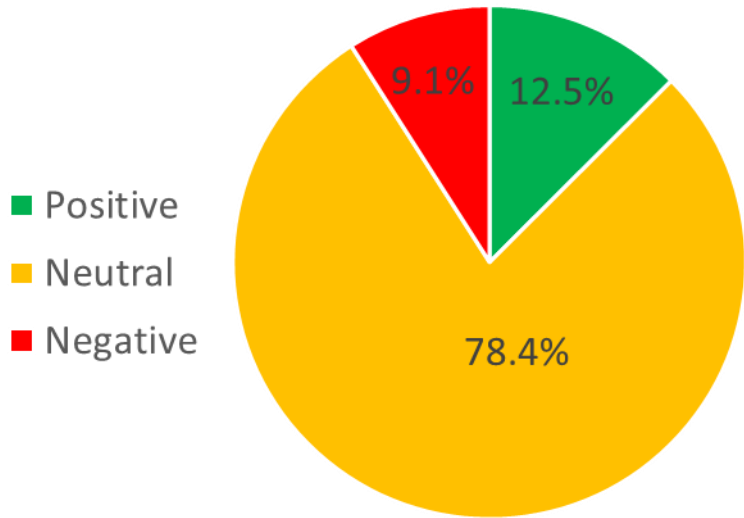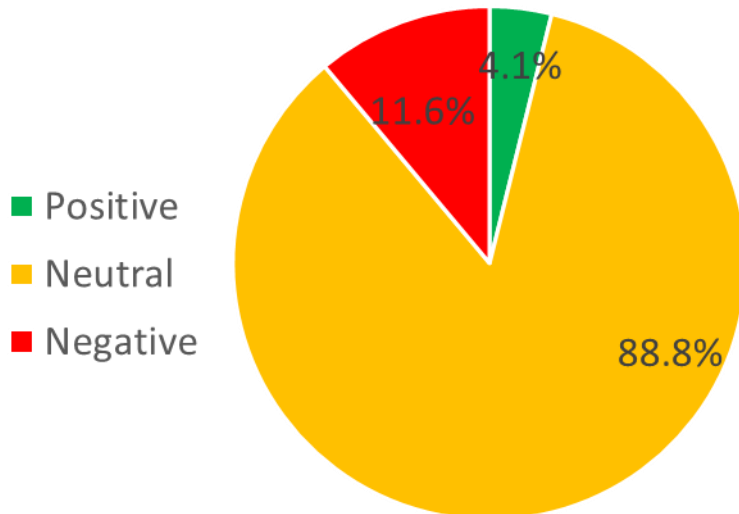
Posed to respondents who are aware of this platform...

- Positive — 14.0%
- Neutral — 77.0%
- Negative — 9.1%

AMAZON | WHEN YOU SEE THIS COMPANY/BRAND NAME, WHAT EMOTION DO YOU FEEL FIRST?

Posed to respondents who are aware of this platform...

- Positive — 31.5%
- Neutral — 62.6%
- Negative — 5.9%

EBAY | WHEN YOU SEE THIS COMPANY/BRAND NAME, WHAT EMOTION DO YOU FEEL FIRST?

Posed to respondents who are aware of this platform...

Positive 12.5%
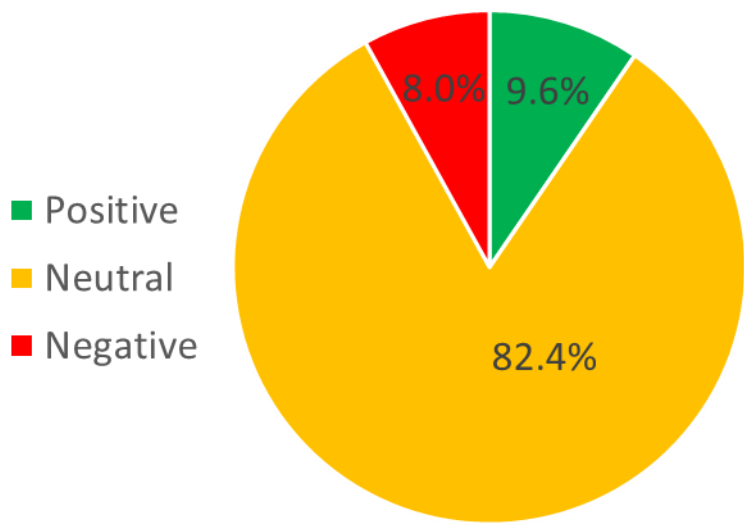Neutral 78.4%
Negative 9.1%

TIKTOK SHOP | WHEN YOU SEE THIS COMPANY/BRAND NAME, WHAT EMOTION DO YOU FEEL FIRST?

Posed to respondents who are aware of this platform...

- ■ Positive
- ■ Neutral
- ■ Negative

3.2%
4.1%
92.8%

OVERSTOCK | WHEN YOU SEE THIS COMPANY/BRAND NAME, WHAT EMOTION DO YOU FEEL FIRST?

Posed to respondents who are aware of this platform…

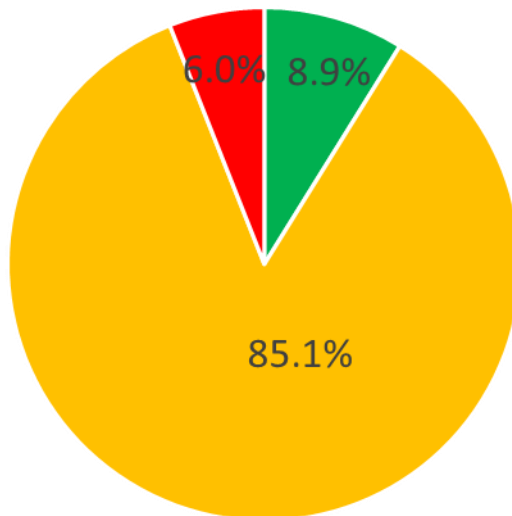- Positive — 6.1%
- Neutral — 83.1%
- Negative — 10.8%

WAYFAIR | WHEN YOU SEE THIS COMPANY/BRAND NAME, WHAT EMOTION DO YOU FEEL FIRST?

Posed to respondents who are aware of this platform...

- Positive — 9.5%
- Neutral — 78.9%
- Negative — 11.6%
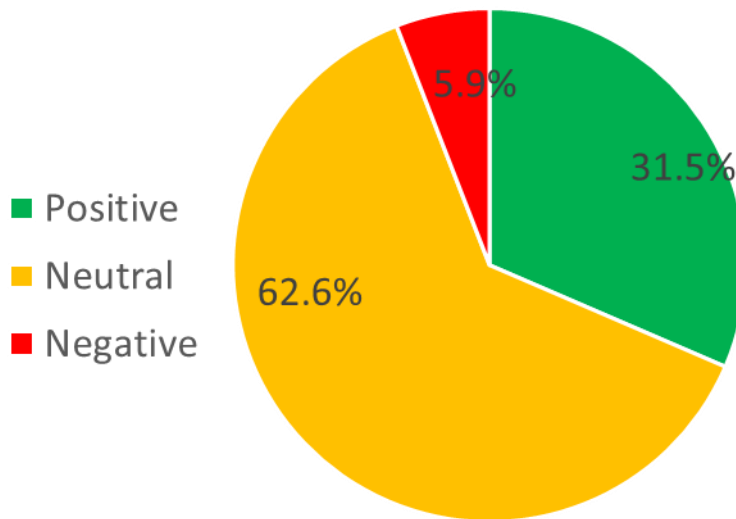
WISH.COM | WHEN YOU SEE THIS COMPANY/BRAND NAME, WHAT EMOTION DO YOU FEEL FIRST?

Posed to respondents who are aware of this platform...

Pie chart:
- Positive: 4.1%
- Neutral: 88.8%
- Negative: 11.6%

TEMU | WHEN YOU SEE THIS COMPANY/BRAND NAME, WHAT EMOTION DO YOU FEEL FIRST?

Posed to respondents who are aware of this platform...

- Positive — 9.6%
- Neutral — 82.4%
- Negative — 8.0%

Posed to respondents who are aware of this platform...

- Positive — 8.9%
- Neutral — 85.1%
- Negative — 6.0%

WHEN YOU SEE THIS COMPANY/BRAND NAME, WHAT EMOTION DO YOU FEEL FIRST?

Posed to respondents who are aware of the below.

Netflix

Amazon Prime

ESPN

YouTube

WHEN YOU SEE THIS COMPANY/BRAND NAME, WHAT EMOTION DO YOU FEEL FIRST?

Posed to respondents who are aware of the below.

Disney+

Apple TV+

HBO Max

Peacock

WHEN YOU SEE THIS COMPANY/BRAND NAME, WHAT EMOTION DO YOU FEEL FIRST?

Posed to respondents who are aware of the below.

YouTube TV

Discovery+

Paramount+

Roku

WHEN YOU SEE THIS COMPANY/BRAND NAME, WHAT EMOTION DO YOU FEEL FIRST?

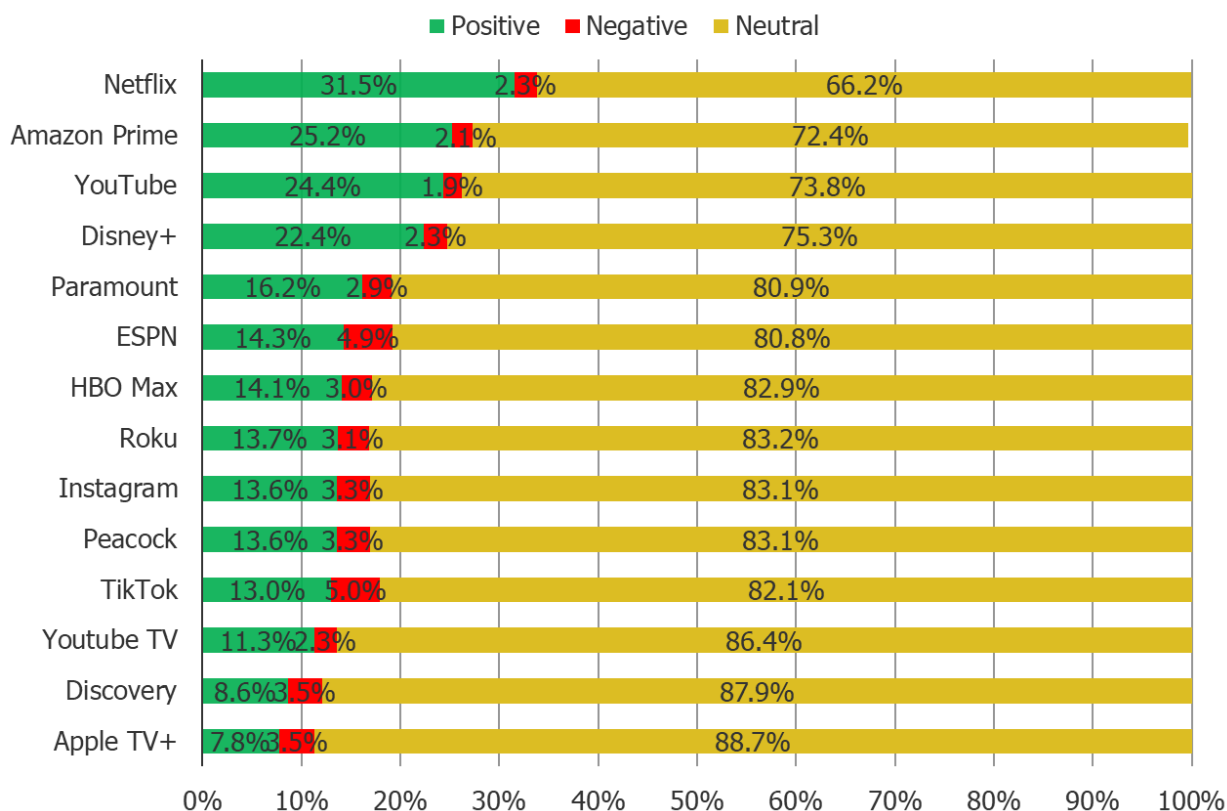Posed to respondents who are aware of the below.

TikTok

Instagram

Posed to respondents who are aware of the below.

Legend: ■ Positive ■ Negative ■ Neutral

Company	Positive	Negative	Neutral
Netflix	31.5%	2.3%	66.2%
Amazon Prime	25.2%	2.1%	72.4%
YouTube	24.4%	1.9%	73.8%
Disney+	22.4%	2.3%	75.3%
Paramount	16.2%	2.9%	80.9%
ESPN	14.3%	4.9%	80.8%
HBO Max	14.1%	3.0%	82.9%
Roku	13.7%	3.1%	83.2%
Instagram	13.6%	3.3%	83.1%
Peacock	13.6%	3.3%	83.1%
TikTok	13.0%	5.0%	82.1%
Youtube TV	11.3%	2.3%	86.4%
Discovery	8.6%	3.5%	87.9%
Apple TV+	7.8%	3.5%	88.7%

ANALYZING WORD CLOUDS FROM THE PRIOR PAGES: EMOTION ANALYSIS – DEEPER BREAKDOWNS

Posed to respondents who are aware of the below.

Company	Anger / Hostility	Contentment / Satisfaction	Enthusiasm / Excitement	Fear / Anxiety	Frustration / Irritation	Indifference / Apathy	Other	Sadness / Disappointm	Surprise / Shock
Netflix	0.1%	28.8%	4.5%	0.0%	0.4%	7.3%	58.2%	0.7%	0.0%
Amazon Prime	0.1%	22.9%	4.5%	0.2%	0.3%	8.2%	62.9%	0.8%	0.1%
ESPN	0.1%	9.7%	5.2%	0.0%	0.6%	9.3%	74.1%	0.9%	0.1%
YouTube	0.3%	21.7%	3.6%	0.0%	0.1%	5.2%	68.8%	0.1%	0.2%
Disney+	0.2%	20.0%	2.9%	0.0%	0.4%	5.9%	69.4%	1.1%	0.0%
Apple TV+	0.1%	7.4%	1.0%	0.1%	0.2%	13.3%	77.4%	0.5%	0.0%
HBO Max	0.1%	12.0%	3.0%	0.0%	0.4%	10.4%	72.8%	1.0%	0.2%
Peacock	0.0%	12.1%	2.3%	0.0%	0.1%	11.5%	73.3%	0.6%	0.0%
YouTube TV	0.1%	10.2%	1.5%	0.1%	0.5%	10.9%	76.4%	0.4%	0.0%
Discovery+	0.1%	7.9%	1.0%	0.1%	0.1%	10.6%	79.3%	0.8%	0.1%
Paramount+	0.0%	14.5%	2.4%	0.1%	0.2%	9.8%	72.2%	0.7%	0.1%
Roku	0.1%	12.7%	1.8%	0.0%	0.2%	10.8%	74.3%	0.2%	0.0%
TikTok	0.7%	11.9%	1.5%	0.1%	1.2%	5.5%	77.7%	1.1%	0.2%
Instagram	0.0%	13.0%	1.0%	0.1%	1.0%	9.2%	74.4%	1.2%	0.0%

Posed to respondents who use each of the below (word clouds to follow).

Company	Neutral (%)	Positive (%)	Negative (%)
Facebook	78.46%	18.80%	2.75%
Twitter / X	93.24%	5.17%	1.58%
Snapchat	89.12%	9.19%	1.69%
Instagram	84.27%	14.36%	1.37%
Pinterest	90.71%	8.66%	0.63%
TikTok	85.43%	13.62%	0.95%
YouTube	77.30%	22.18%	0.53%
Nextdoor	97.57%	1.80%	0.63%
Discord	96.83%	2.64%	0.53%
Roblox	96.52%	3.27%	0.21%

	N =
Facebook	770
Twitter / X	325
Snapchat	296
Instagram	519
Pinterest	393
TikTok	372
YouTube	825
Nextdoor	181
Discord	136
Roblox	93

WHAT IS THE FIRST EMOTION THAT COMES TO MIND WHEN YOU SEE THIS COMPANY NAME?

Posed to respondents who use each of the below (word clouds).