

THE BEST OF WHAT WE'RE SEEING



WHAT THEY'RE SAYING

"The first time I ever received John's email I thought I was being hacked by a nut case - and I was right. But damn I love him and the content of his email...even though he is too much of a pu**sy to drive a manual Porsche. Best way to spend a Saturday morning coffee break."

Andrea Brimmer, CMO, Ally Financial

"Nothing better than starting Saturday mornings with John Dick and his newsletter. It's a definite coffeespitter...12.3 percent of the time."

Mark Cuban, The Cuban Companies

"John's Saturday morning column lives somewhere between insight served up like a tasting menu at a Michelin Star restaurant and Saturday Night Live opening monologue of self-deprecating humor. It's the only thing that challenges my coffee for the first thing I do on Saturday."

Bracken Darrell, CEO, Logitech

"I love John's weekly email – I always see a discussion of a topic I find of interest that leverages their proprietary survey data and analytics – well worth the time to read."

Rich Greenfield, Media Analyst, BTIG

"Subscribe for the stories, stay for the data. A Saturday morning MUST-READ!"

Bob Lefsetz, The Lefsetz Letter

WHAT THEY'RE SAYING

"You know you've made it when what you did on Friday shows up in JD's email on Saturday morning."

Rob Lynch, President, Arby's Restaurant Group

"John Dick's weekly dose of Saturday morning enlightenment helps me to understand that when I'm playing bass guitar in a stadium filled with 50,000 people, more than half of the audience likes cottage cheese and have had their wisdom teeth removed. Now THAT's rock and roll!

Matt Mangano, Bassist, Zac Brown Band

"Every day, I get messages from truly inspirational Pittsburghers. But when I'm not reading those, I read John Dick's Saturday morning email."

Mayor Bill Peduto, City of Pittsburgh

"Two things I can count on from John Dick's Saturday email --- a worthwhile insight based on rock solid research, and irrefutable evidence that he's crazy."

Colleen Fahey Rush, EVP and Chief Research Officer, Viacom

"John Dick's Saturday morning email is one of those things you never knew you needed til you get it. Who says 'You know, I really wish I had a range of seemingly random but insightful cultural observations and data, mixed with self-deprecating personal history and dick jokes, to get my weekend started right?' But it works. It just does." Steve Shure, Vice President, Amazon

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The Legendary, Imaginary Friend (3/10/2018)

Ten years ago, a few of my fraternity brothers and I created an imaginary friend. His name is Will Rochester from Savannah, Georgia.

Why would grown – arguably - adults invent a fictitious person, you ask? Naturally, to cajole one of our (real) friends into believing he had partied so much in college that he completely forgot an integral member of our group. That's why.

Also, we're terrible people.

It all started because nobody wanted to pick up our real friend (we'll call him Ben) at the airport the morning of our 10th college reunion, as we had all been out too late the night before. "It's Rochester's fault," one guy randomly texted. And off it went.

All weekend, we spun stories, like the time Rochester crashed a Vespa into the Ft. Lauderdale Hilton during Spring Break or, sophomore year, when he lost a bet and had to detail the interior of Ben's Saab with a toothbrush. Ben laughed right along, not wanting to acknowledge he had lost so many brain cells that he couldn't even remember a whole person.

We later set up a Gmail account for Rochester, so he could participate in the group thread. He joined our fantasy football league (my wife managed his team – adding the subtle touch of drafting Matt Ryan of the Atlanta Falcons every year because, well, Rochester is from Georgia). I've personally emailed Ben from Rochester's account, engaging in sincere two-way banter.

He absolutely buys it, hook, line, and sinker.

We're careful not to overplay it. Rochester lives in Asia now and only chimes in occasionally. He never uses social media, the legend goes, because of questionable "romantic" choices he made over the years – with accompanying stories, of course. We've covered the tracks.

And it's still going on a decade later.

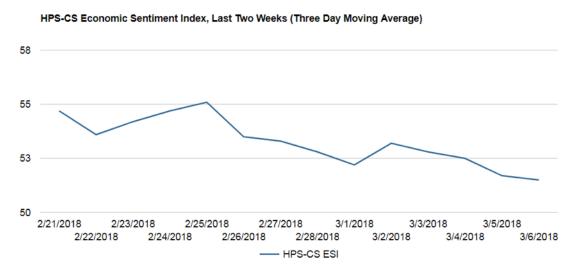
I know, I know. We should be ashamed of ourselves. What kind of sick, twisted people do that to a close friend? Will we ever fess up? How will we explain ourselves when Rochester eventually dies and Ben flies all the way to Savannah for his funeral?

We don't know yet – but we're thinking a closed casket should do the trick.

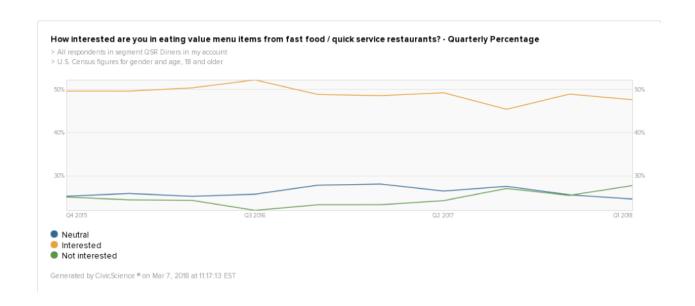
Guess you'll just have to keep reading until that unfolds.

In the meantime, here are a few real things we're seeing right now:

Consumer confidence dropped to its lowest point this year, at a potentially pivotal time politically. Our bi-weekly Economic Sentiment Index showed a second consecutive steep decline this week. The President's steel tariff announcement seemed to inspire a jump but only for one day. The negativity could just be a blip, as we've seen our Index bounce a lot (mostly up) during the Trump era and the Jobs Report yesterday won't hurt. However, the timing of these numbers is interesting. Next Tuesday, all eyes will be on a special congressional election in our backyard of Western Pennsylvania, where the race is widely viewed as a referendum on the Trump presidency and the polling margins are razor thin. Even a little bit of erosion in consumer confidence could be enough to tilt the race, triggering a domino effect heading into next fall's midterms. All of that is unlikely, given that Trump won this congressional district by 20 points, but it's not unimaginable.

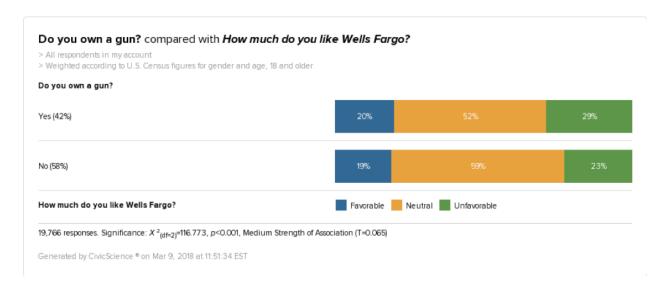


If you wonder why we study these macroeconomic forces so closely, look no further than the QSR industry. One of the dozens of questions we track about restaurant dining enquires about people's attitudes toward fast food value menu offerings. Look at the chart below and notice how attitudes toward value menu items among frequent QSR diners have shifted, coinciding with the rise in consumer confidence we've seen since the 2016 election. Value menus are still popular, for sure. But if you want to understand why McDonald's can have success with "Signature Crafted Sandwiches" and fresh beef right now, this helps to explain it. If you can study consumer sentiment granularly enough, there is arguably nothing more impactful or predictive of industry (and political) trends.

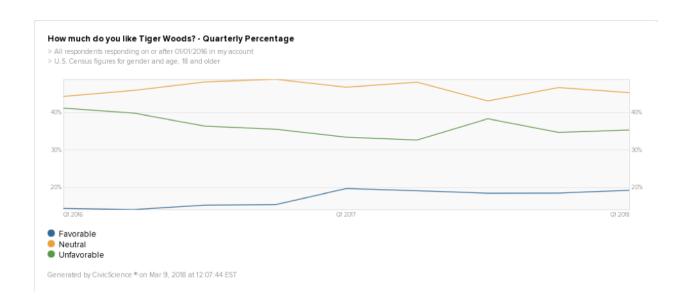


One thing that isn't changing – because of economic sentiment or otherwise – is the pace of mobile payment adoption in the U.S. Numerous experts have pontificated on the disparity between the growth of mobile payments in places like China and underwhelming numbers in the U.S. Our data tell us that only 1% of U.S. adults use mobile payments as their primary means of making purchases and that has barely budged in over two years. It's crystal clear that security fears and personal privacy concerns are still holding people back, even our digitally-native Millennials.

Wells Fargo has quite a gun conundrum. I've always associated Wells Fargo with San Francisco because it's headquartered there so – sorry to stereotype but it can be a real time-saver – I assumed its customer base would skew more Liberal. So, when news broke this week that Wells Fargo is the "top banker for the NRA and gunmakers," I cringed for them. The numbers paint a more complicated story. First, we found that Wells Fargo, just a fraction more than Chase, had the highest rate of gun ownership among its customers of the four largest U.S. banks (BofA, Citi, Chase, and WF). But net favorability among gun owners was higher for WF (-9%) than for Chase (-12%) overall. The folks at Wells Fargo need to thread a tiny little needle or risk alienating one big customer segment or another. Tribalism is a bitch.

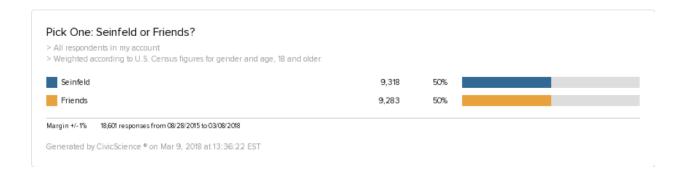


The Tiger Woods Show is heating up. Count me among the sports fans who are giddy over the apparent return of Tiger Woods. Whether (or when) he wins, it will be interesting to see if Tiger can reclaim his perch in public opinion. After bottoming out with the whole crashing-his-SUV-into-his-house-because-his wife-was-whacking-him-with-a-golf-club-for-sleeping-with-a-Perkins-waitress thing, Tiger's favorability seemed to stabilize a year ago. Then came the whole passed-out-in-his-car-for-popping-Vicodin-and-then-rehab thing. Now it's calmed down again. Let's see what happens if he starts winning. Americans love a reclamation story.



Your Random (Seinfeld) Stats of the Week

- Kramer is the most popular main character, by far, at 47%, followed by George and Elaine at 18% each and Jerry at 16%
- George's parents are the most popular side characters at 22%, followed by Newman at 19%. J Peterman is a distant third at 6%
- 51% of people think Seinfeld is overrated
- How's this for an even split:



Hoping you're well.

JD

A Very Special Hat (6/9/2018)

I collected baseball hats growing up - hundreds of them. Sports teams, colleges, Spuds MacKenzie, you name it. They were thumbtacked to the wood paneling on every inch of my bedroom. I was the easiest kid in America to buy a gift for.

When I was about 8, my dad bought me a special hat. I wore it non-stop for weeks, like when we would go grocery shopping on Monday nights. I loved the gazes it drew from passersby. I can still picture it. A solid, dark brown trucker hat with brown mesh. Emblazoned across the front in tall white letters was one word: "SHITHEAD."

Seriously. Shithead. I was 8.

Can you imagine a parent doing that today? I would've been hauled off to CYS before we got through the produce aisle. My picture - and memes - would be plastered all over the internet.

Do I resent my dad for doing that to his adolescent son? Of course not. He was the best man in my wedding.

I told that story to begin his eulogy a few years ago. It cut the somber tension like a laser. But it also illustrated how he raised us to laugh at ourselves and to brush it off when others laughed at us - an essential life skill when you go through childhood with the last name Dick. Do you know I couldn't get pizza delivered to my house as a teenager? They thought it was a prank call.

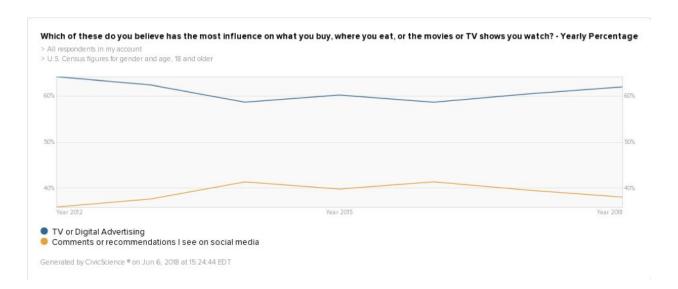
I think about this stuff when I look at our data sometimes. People are more apt to boycott the NFL over anthem protests than domestic abuse. I mean, come on. Everything has become so raw, so polarizing, so serious. Don't even get me started on the Stage Moms and Gym Dads who think their kids can do no wrong.

Things like discrimination, persecution, and violence are never funny. But somewhere short of those is a place where we've lost the ability to laugh at ourselves (and our kids). We're afraid that if we give an inch, we have to give a mile.

I hope this is all just a phase.

Here are some other phases (or not) that we're seeing right now:

We're losing trust in our friends. Well, maybe. During the rise of social media this decade, we began to see people relying more on comments and recommendations from their friends when making consumer choices. The numbers stayed relatively steady until 2016, when the data began reverting to the early-social-media days. Those of you from the TV networks could argue that advertising is just getting more effective. You might be right. I'm more cynical than that...



Don't blame the TV networks for a lack of originality – it's what people want. We started the first phase of our analysis of the 2018 Upfronts and <u>the findings are fairly resolute</u>: People want familiarity. Virtually all of the upcoming fall premieres with the best metrics in our data are either a) previously-cancelled shows, like *Brooklyn Nine-Nine*, that were picked up by another network; b) reboots of old shows like *Magnum P.I.* or; c) name-droppers like *FBI*, which trace their lineage to well-known TV producers. Isn't it time to bring *Cheers* back?

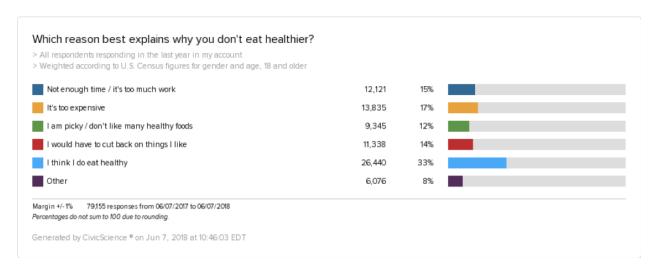
Gen Z consumers are much more likely to prefer product placement over traditional advertising. I won't say much more than that – you can <u>read the full writeup</u> if you want. Unlike the TV networks, advertisers will need to get more and more creative to break through.

Over 1/3rd of U.S. workers work from home all or part of the time. I did the first of a series of short webinars this week (here are the upcoming ones, fyi). It was entitled *Introvert Nation* and delved into the what's, why's and what-next's of our "stay-at-home economy." One dimension we explored in greater depth on our blog was the impact of a remote workforce. The trend is being driven by women (especially moms). Millennials are way more likely to want to work from home all of the time. Gen Xers only want to work at home part of the time – probably because we have kids and we need to get the hell out of the house every once-in-awhile.



Wendy's has a slight lead on McDonald's among tech-savvy diners but that'll probably disappear soon. We did a little <u>side-by-side comparison</u> of Wendy's and McDonald's fans and found them to be similar on most accounts. The only noticeable difference was that Wendy's fans lean more tech-heavy. They're more likely to be early adopters, addicted to their device, and pay closer attention to tech trends. But McDonald's is a freight train right now and with the announcement that they'll be introducing all sorts of new tech-forward ordering features, they'll probably gobble up those techie Wendy's customers in about a minute.

Most people don't eat healthy and there's not really a single big reason. A whopping 2/3rds of U.S. adults do not believe they are healthy eaters. About 1/3rd blame cost or effort. Not sure how to solve the problem when the excuses are so diverse.



Your Random (Embarrassing) Stats of the Week

- 26% of people feel embarrassed when they receive a compliment
- 50% of people have experienced an embarrassing wardrobe malfunction
- 40% of people have sent an embarrassing text to the wrong person
- 57% of people keep their embarrassing moments to themselves, 33% share it
- 42% of people say they're easily embarrassed

Not me, thanks Dad.

Hoping you're well.

Sincerely, Shithead

My Daughter Was A Racist (7/14/2018)

Our daughter told a racist joke to the Hispanic waiter at our local Mexican restaurant. How was your week?

Actually, she was in 2nd grade when it happened.

The restaurant is a block from our house and the salsa is other-worldly, so we go there all the time. We sit in Eddie's section because the kids love him. He always has a battery of jokes, magic tricks, and riddles for them. They stockpile their own material to riff with him.

One day, while volleying jokes back and forth, Maddie says, "I heard a joke on the bus today." I immediately white-knuckle my margarita glass – there were fifth-grade boys on that bus.

"A Mexican, an Asian, and an American are on an airplane..."

Oh no.

Eddie bursts out laughing, not at the joke, but at the look of horror on my face. He slides into our booth, folds his hands – grinning ear to ear – and listens.

It turned out the joke was at the Asian's expense. There's a big Korean population in our town. The 5th-grade kid who told that joke probably picked it up from his disgruntled dad. I know the guy. If I've learned anything as an adult, it's that asshole kids usually have asshole parents.

Maddie had no idea what the joke meant, only that she heard the older kids laughing at it.

Eddie and I gently explained why the joke was wrong and hurtful. She cried for the rest of dinner, the entire walk home, and for an hour before she fell asleep.

Six years later, she organized the walk-out at her middle school after the Parkland shooting. She recently accused me of being "racist" because I replaced the lyrics from *Despacito* with "Ranch Doritos." She's a country-mile left of me politically.

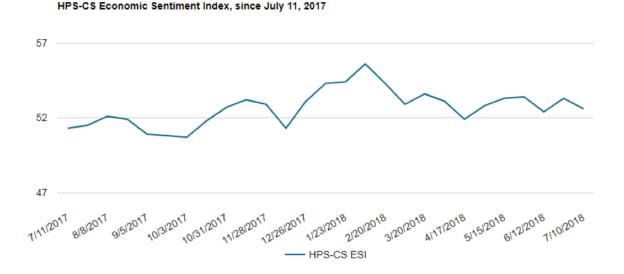
But she's also a patriot. She has a side-gig singing National Anthems for charities and sporting events (<u>Here's her most recent Penguins game</u>. Trust me. It's spectacular).

Why am I sharing all of this? So, I can brag about my daughter, obviously. But also as an important reminder that kids, probably much younger than we think, are paying much closer attention than we think. Who knows how much of this craziness in our country they're seeing right now and what it will mean when they're adults. Your guess is as good as mine.

Here's what we can see right now:

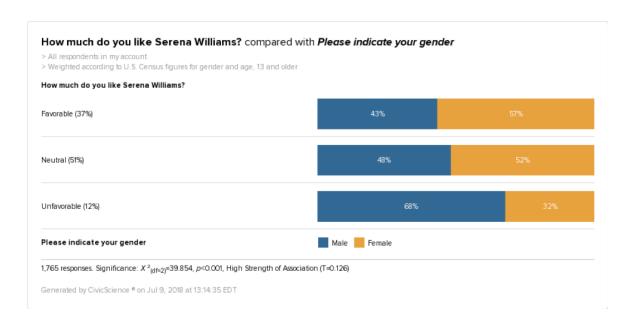
Consumers and investors, alike, are a little spooked by this whole Trade War thing. Both our Economic Sentiment Index and Investor Sentiment Index had a little hint of down-and-to-the-

right in their most recent readings. For sure, most consumers don't have a strong grasp of trade policy and tariffs, but they know uncertainty when they see it. Whatever. I'm sure everything will bounce back up in two weeks for some yet-unforeseeable reason because that's just the way things have been going pretty much since February.



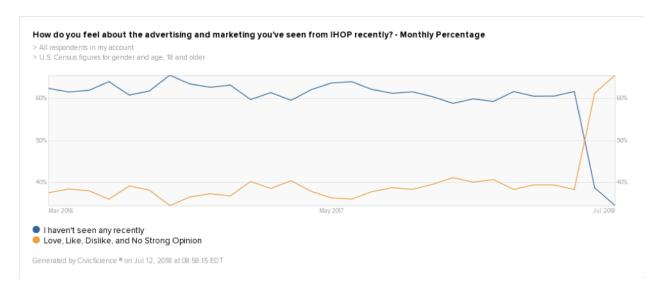
People are starting to seek mindless refuge from the political storm. We track all sorts of media consumption by genre and have <u>noticed a recurring theme</u> over the past two quarters. Interest in action (TV and film), fantasy (books and movies), cooking/home/lifestyle programming, and other "escapist" content areas are on a noticeable rise. I know a ton of people from Netflix read this email every week – maybe you can tell me otherwise.

Men and women can't agree on Serena Williams. These results were so sadly-unsurprising that I almost didn't mention them. Women have far more confidence in Serena's post-pregnancy tennis career than men do. Oh, and men are much less likely to have a favorable opinion of her at all. Men also oppose the U.S. Open's decision to take pregnancy into account when determining tournament seeding. Look, Serena Williams is arguably the most dominant athlete of all-time in any sport, of any gender. She's playing in the Wimbledon final today – only 13 matches into her comeback. Guys, stop hating.



Ridding the planet of plastic straws is one of the few things we can (mostly) all agree on. It's not going to bring about world peace but a clear majority of people can get behind the idea of banishing plastic straws and that's at least something. Most notably for those of you in the restaurant industry, diners at fast food and fast casual joints (the ones most likely to peddle plastic straws) are the most supportive of eradicating the straw population. Huge hat-tip to Emma on our team who had the nerve to pen the words, "going straw-less is flawless." That kind of word sorcery is out of my league.

An even bigger hat-tip to whoever came up with IHOP's name-change spectacle. I hope you all listened when we told you it was a ruse from the beginning – a brilliant ruse. I'm not sure I've ever seen a chart in our data like the one below. Awareness numbers for IHOP marketing flipped in a hot minute. For what it's worth, overall sentiment toward the brand (not pictured) was more negative during that time, but I'm guessing that's because so many people thought they were serious. Bravo IHOP marketing people. Bravo.



Random (Eye) Stats of the Week

- 37% of U.S. adults say they have brown eyes, 30% blue, 21% hazel, and 11% Other;
- 73% of U.S. adults wear eyeglasses (or contacts) some or all of the time;
- 38% of people wear glasses just to read;
- 19% of people can only wink with one eye, 4% can't wink at all;
- 27% of people say they always lose their sunglasses;
- Therefore, 30% of people buy cheap sunglasses.

Put me in the always-losing-my-cheap-sunglasses category.

Hoping you're well.

JD

I'm an Impostor (8/4/2018)

It makes me cringe when people refer to me as their "boss." I hate it, actually.

It goes back to my first gig as an entrepreneur. I was 24. The business was successful right away, and we hired people in droves. Almost all of them were older than me. Most, considerably so.

It was a classic case of imposter syndrome. I couldn't believe all those people left cushy jobs to come work for us, and I sure as hell didn't see myself as their superior in any dimension. I called everyone "my partner," even though nothing on the cap table – or the debt liability - warranted it. I just wanted them to forget that their employer wasn't old enough to rent a car.

The first person I ever had to fire was a retired, decorated Air Force General, 30+ years my senior. I can't tell you why but I had no choice — or I probably would have chickened out. I've fired dozens of people since and I still can't sleep the night before. But that night, I was a special kind of terrified.

It wasn't as bad as I feared.

It was worse.

He yelled at me like a drill sergeant, straight out of central casting. He said – and I'll never forget this as long as I live – that he used to make people my age "clean toilets with toothbrushes." Right hand to God. I was one demeaning comment away from shriveling up, handing him my office keys, and crawling back to my parents' house.

Eighteen years later, I still struggle to see myself as "the boss." I sometimes forget that I can't just spout off a random idea because someone might interpret it as a directive, drop whatever they're doing, and launch a full-blown company initiative around it. I don't weigh in on product design because I suck at it and the team puts more stock in my opinions than they should.

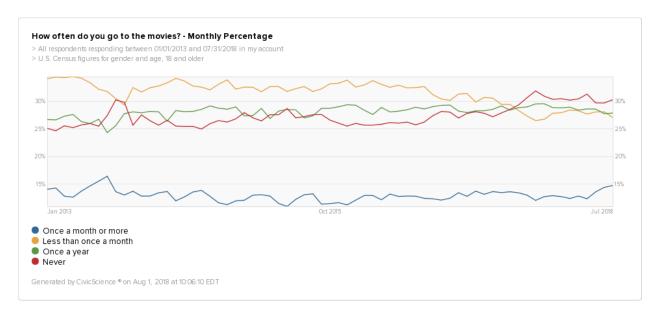
The people who work here are way smarter than I am. Why would I hire anyone who isn't?

Maybe someday I'll grow into the "boss" mindset and realize I'm not 24 anymore. As if the three-day hangovers, Dad-bod, and rapidly-deteriorating eyesight aren't reminder enough.

Here's what I'm still able to see, even without reading glasses:

The early favorite for 2018 Comeback Player of the Year is...the U.S. movie industry. After kicking them while they were down following an abysmal 2017 summer, I owe Hollywood some love. Our recent tracking numbers (1.5MM U.S. adults and

counting) have shown the steepest climb in monthly+ movie-goers since the blockbuster-laden summer of 2013 (ye of "Iron Man 3," "Man of Steel," "Monsters University," and tons of others). Bravo, Tinseltown. Keep it up.

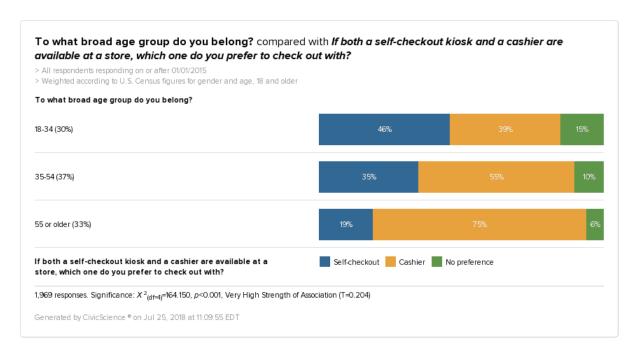


Just don't spend too much time in the movie theater because it turns out that sunlight is really good for your soul. Hopefully that insight doesn't violate your sensibilities – seems like a no-brainer to me – but you can read a bit of research I did all by myself this week. Short story shorter, people who get more sunlight than their peers are over 3X more likely to be "Very Happy" in their lives. There was also a crazy correlation between how much sunlight people get and how likely they are to own an iPhone. Oh, and people who get more sunlight are more likely to drink wine. Maybe that's why they're so happy.

Also, you shouldn't smoke cigarettes for breakfast. Am I being Captain Obvious this morning or what? Here's what wasn't so obvious. Even with all kinds of trends in healthy eating, breakfast products, and overall lifestyle the last decade, the percentage of people who do and don't eat breakfast regularly hasn't moved an inch. 19% of Americans don't eat breakfast (admittedly I'm one of those, other than weekends) and they are generally much more likely to be overweight, avoid the gym, drink in excess, be addicted to a digital device, and smoke cigarettes every day. 4.4% of U.S. adults, we concluded, must smoke cigarettes for breakfast.

The self-checkout kiosk will eventually take over the world. At first glance, it appears self-serve retail has a long way to go, as a large majority of Americans still prefer the old-fashioned cashier over the self-checkout option. I generally fit into that category unless the lines are out of control. But Millennials. Ah yes, the Millennials. The majority of them prefer self-checkout and it gets more popular the younger they are. That's where things are going, whether you like it or not. In related news, I asked a little-old-lady cashier at Home Depot last weekend if she was "checking me out" and

apparently it was a lot funnier in my head than she thought it was. So, yeah, don't ever do that.



Scooter-sharing services could be legit. After Uber's recent investment in electric scooter company, Lime, and a few other startups percolating in the space, we began tracking consumer interest in the category. A respectable 1 in 4 U.S. adults say they would be either very or somewhat likely to use a scooter-sharing service if one was available nearby. They're particularly enticing to Millennials (duh) and the environmentally-conscious, but the big correlation was among people who regularly use public transportation. This could be a phenomenon worth watching. However, I was just told that the scooters also come with shared helmets, which is gross, unless you BYOH. Lice-sharing is not cool.

Only about 6% of Americans are currently in therapy with a mental health professional but over half of those are Millennials or Gen Z. And an even larger percentage of Millennials say they are considering it. Are these younger generations just more enlightened and in touch with their feelings? Did we improve availability of these kinds of health resources? Or have we just created a more stressful and anxiety-ridden world for them? I'll bet it's some combination of all of those things. And please don't email me some rant about younger people being too sensitive and weak — because that's not what this is. And, even if it was, who's fault is that?

Some of Our Most Popular and Random Questions This Week

Do you think the culture of the internet has changed us for better or for worse?

Can you read and listen to something at the same time?

Is it socially acceptable to take an elevator up/down one floor?

Are you ok with making small talk or do you dread it?

Does a weekend with no plans at all make you happy?

<u>Is there anything wrong with 'working for the weekend'?</u>

Are the fries at the bottom of the bag better or worse than the other fries?

Have fun with those.

Hoping you're well.

JD

Don't Trust Our Data but Trust it More Than Anyone Else's (9/8/2018)

Raise your hand if you have time to answer surveys for 30 minutes every day for \$5.

Me neither.

But those are the people who comprise about 95% of survey data nowadays.

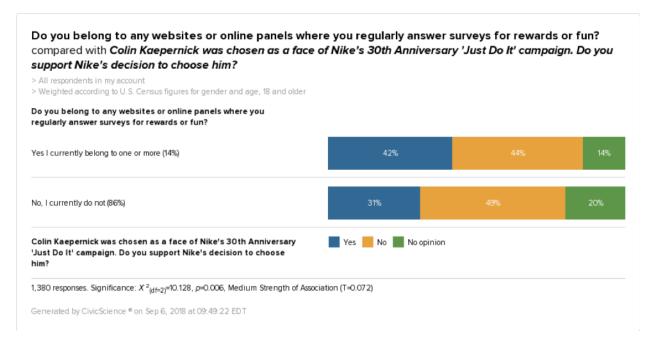
You see, when people started dumping their landlines twenty years ago, polling as we knew it began to die. Along came innovators, luring survey-takers to websites or apps with a financial reward. The problem is that survey demand outstripped the supply of willing participants, so people with the most free-time or inclination to earn an extra buck took on most of the load.

But guess what. Most of those people don't look like you, me, or the rest of the average population. And it's not just demographics, although they're more likely to be female, for instance. Good statisticians can adjust for that.

The thornier problems are 'psychographic' ones – our data tell us that hyper-survey-takers are more brand-aware, coupon-using, and media-obsessed, among many other things. Those biases are nearly impossible to fix statistically.

Take this much-publicized study about the Nike/Colin Kaepernick kerfuffle this week, purporting to represent the views of all Americans on the issue. Clearly, it was rigorously collected and reported.

But look what happens when we asked a similar question to two groups of people, the 14% or so who do survey panels and the 86% who don't.



Notice the difference between the two blue boxes. Survey guinea pigs are 35% more likely to support Nike and 30% more likely to have an opinion at all. That's an enormous variance.

Could that panel study provide some directional insight? Sure. Is it the unassailable truth? Certainly not.

Please take survey data with a grain of salt when you see it, even ours. While we're making huge strides, we're not perfect either – we're just closer. We don't pay respondents. We just make it quick, easy, and intellectually-rewarding. And that allows us to study over 60+ million people at any given time, including lots of them who are too busy otherwise.

Sorry to go all inside-baseball on you. But that's how the sausage is made.

Here's what we're seeing this week:

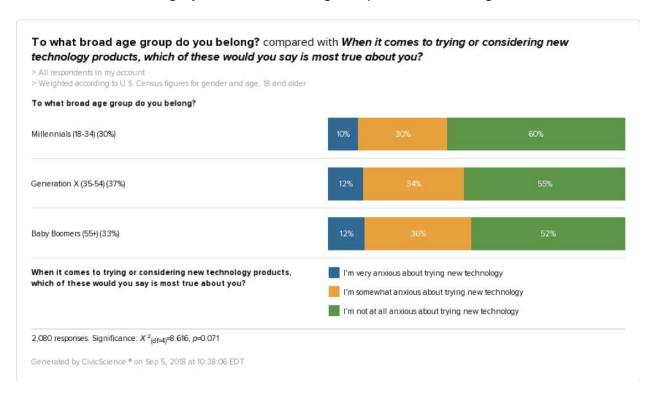
Consumer confidence caught a nice little groove over the past couple weeks. After a few unusually-flat readings, our Economic Sentiment Index showed a little giddy-up in its latest report, driven by people's continued happiness toward their personal finances. Check out the chart below. Even as outlook for the broader U.S. economy is all over the place, personal financial health has been climbing since June. Let's see if we can keep it up until the holidays.



Eco-friendly consumerism continues to rise. The percentage of Americans who make it a priority to purchase environmentally-friendly products and services has <u>reached its highest point</u> since we began tracking the trend in 2015. The combination of increasingly-socially-conscious brands and growing consumer confidence have created the perfect scenario for enlightened shopping. Naturally, the

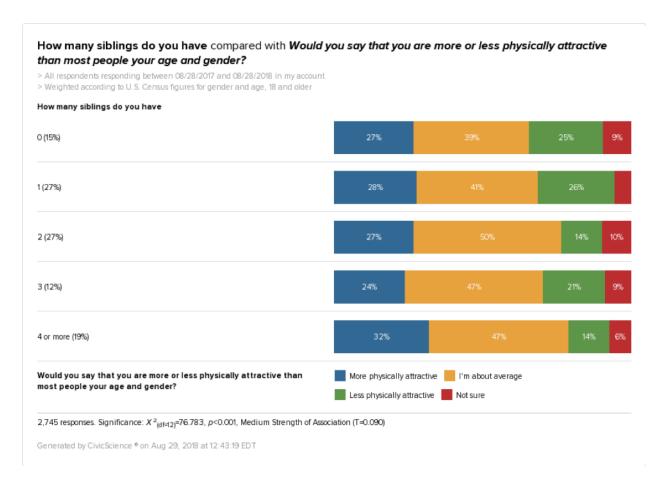
trend is being propelled by Millennial and Gen X women, who <u>I've told you a million</u> <u>times</u> are the most important consumers on the planet right now.

Fear and anxiety are still holding back a ton of tech adoption. More than 40% of Americans experience at least some anxiety over trying new technology products. Yes, age has something to do with it but only a little. Well over a third of Millennials fall into the tech-anxious category. This is something companies need to figure out.

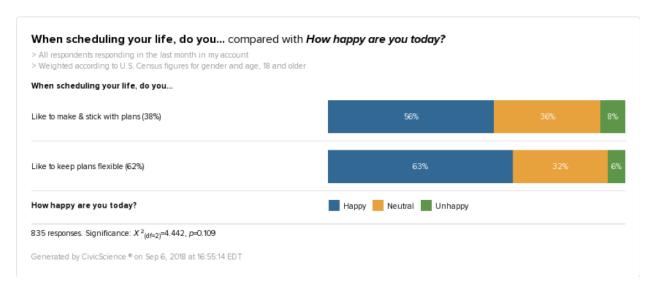


And no, we don't think Nike is going to suffer long-term over any kind of boycott but it's too early to be sure. Our friends at the NPD Group would tell you that 66% of Nike buyers are under 35 and 45% are under 25. Then there are Gen X athleisure moms. Sound like a bunch of Trump supporters? In the end, Liberals are more likely to boycott brands and/or jump to their support for social reasons. If the opposite were true, Under Armour would have surged when their CEO supported Trump. Nope. Anyway, it's too soon. We've seen from a lot of brand crises the past two years that knee-jerks seldom correlate with long-term outcomes.

The more siblings people have, the happier they are. True. The differences are subtle, but the correlation is undeniable. And it's not just about overall happiness. People with 4+ siblings are the most likely to be happy in their job, to have a positive self-image, and even to think they're taller – yes taller. I loved this little study, even though I'm perfectly happy with my one sibling.



But the more people obsess about planning, the less happy they are. This was another deep dive we did this week. You'd think that maybe being better organized and predictable in your life would alleviate your stress, but no. Flexible people are happier, plain and simple. Interestingly, Millennials are much more likely than other cohorts to prefer making and sticking with plans. Maybe you all just need to chill out.



Some of Our Most Popular-to-Answer Questions This Week

I loved these.

- o Are you your authentic self at work?
- o Are you friends with your boss on social media?
- O What do you like the most about fall?
- o Do you type in all lowercase when you text?
- o In your opinion, is it too early to be marketing pumpkin-flavored products?
- O Do you ever drive barefoot?
- As a whole, is society better or worse off with technology?

Hoping you're well.

JD

Why Having Investors is Awful (9/22/2018)

Having investors is the worst.

No, I didn't say "investors are the worst." Not ours anyway. I genuinely love them. Everybody hugs at our board meetings.

Shortly after you get this email every Saturday, I write an even more candid one to my fellow fiduciaries, telling them about all the things I f—ked up last week, what I'm worried about, and why I'm excited about everything else. It's equal parts self-effacing and chronically-optimistic.

I can be vulnerable because I trust them and I'm pretty sure they trust me. They've certainly put a ton of faith in me.

And that's what kills me.

I can handle all the job stress in the world, making payroll, hiring the right people, firing the wrong ones, closing the big deal, giving the big speech. But the weight of someone else's confidence, trust, and sacrifice – not to mention, millions of dollars – is a different ballgame.

I never had that problem in my first company. I lived with my parents and took out a small loan with a personal guarantee to get started. I thought that was pressure. Ha!

My wife is a big investor in CivicScience (as much as I am, legally). So are my kids. I could have a cushy 9-to-5 and a fat 401(k). But no. My family lives with uncertainty, day-to-day and year-to-year.

All of our employees are investors too. Each of them could make more money while working less elsewhere, assuaged only by the hypothetical value of stock options – a high-risk, high-reward bet on the vision and hope I sold them.

Or was it a bet on *me*? God, I hope not.

I don't mean to sound narcissistic. But there are two types of entrepreneurs in the world: admitted narcissists and bold-faced liars. And I'm in the truth business, so you do the math.

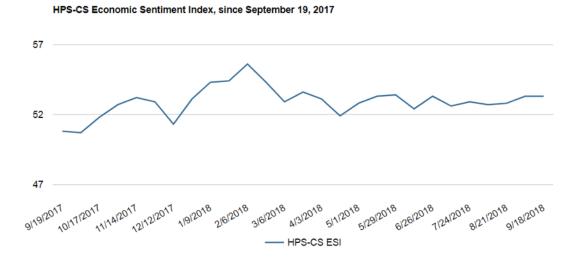
The idea of failing doesn't scare me. The idea of all those people thinking I failed *them* terrifies the living shit out of me. It's in the back of my mind every day and every insomnia-laden night.

They don't prepare you for that at entrepreneur boot camp or B-school. So, take it from me. If you're sailing your own boat, think twice about dragging all those people on board with you.

Then, do it anyway. Because it's worth it.

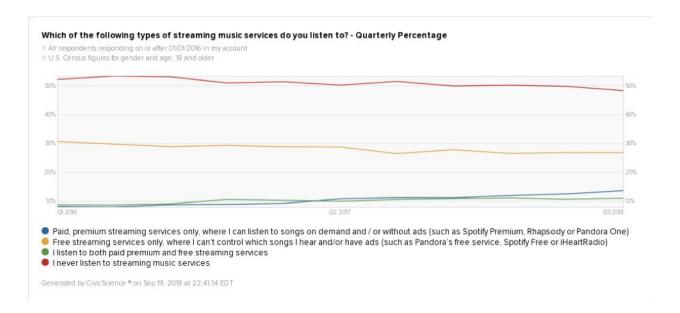
Here's what we're seeing right now:

Consumer confidence was completely flat over the past two weeks and it's the first time we've ever seen that in 6 years of tracking it. A steep downturn in consumers' enthusiasm about their personal finances was evenly offset by a nice buzz around the job market, housing market, and overall U.S. economy. I don't know why but it feels like some kind of calm before a storm – good, bad, or otherwise.



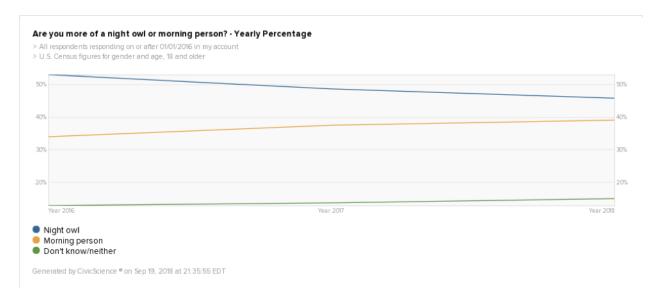
Widespread student debt is shaking up the housing market. There's a cute little narrative that says Millennials are renting apartments instead of buying homes because they like to be more urban and more mobile, with a smaller carbon footprint or whatever. Read this brilliant piece from Danielle on our team and you'll see the real story. Millennials aren't buying homes – at least yet – because they're drenched in student loan debt. I'm no economist but that makes a lot of sense to me. All that money has to come from somewhere.

Paid streaming music, however, is slowly creeping into a new category of product adoption in the U.S. We should stress the word "slowly" but check out the chart below. The percentage of Americans who listen to a paid streaming music service (the blue line + the green line) has risen from 17% to 25% since 2016. Free, ad-supported services are losing share as a result. So is broadcast radio, but you already knew that because you haven't been asleep for 20 years.

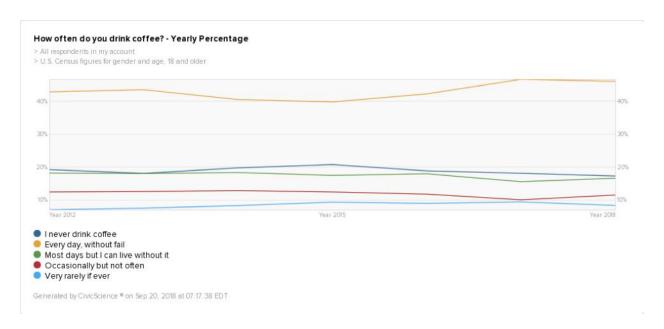


Meanwhile, personal budgeting apps like Mint are still waiting to go mainstream. Get used to me talking a lot about our new model for studying and predicting new product/tech adoption, which we're unveiling at a conference next month. Personal finance apps like Mint or Acorns, for example, are mired in a low stage of adoption (about 6%) with only another 6% in the near-term growth segment. The apps are more popular among the younger set but may not be enough to disrupt the market. I give the advantage to the retail banks, long-term.

Millennials are going to kill late night television. Most Americans are night owls. We have been for a really long time. Then along came the Millennials, waking up early, drinking less, eating their avocado toast. And look what happens. The gap is closing fast. The percentage of Americans who identify as night owls has dropped nearly 10 points in 2 years. And it's almost all from the 18-34 cohort. It's certainly not me. I'm writing this at 1 am.



That might also explain why obsessive, daily coffee drinking is on the rise. This email usually goes out just before 7 am EST on Saturday morning and we typically see about 1/3rd of our total open rate by 8:30 am. That means a ton of you are morning people and I'm guessing most of you have a coffee within reach right now. You're not alone. Fast approaching half (47% to be exact) of U.S. adults now drink coffee "every day, without fail" up from 40% just three years ago. Color me an outlier – a night owl AND addicted coffee drinker.



Our Most-Answered Questions of the Past Few Weeks

- Have you ever found out a colleague made more than you?
- New car smell: love it or hate it?
- Be honest: do you care much about how your lawn looks?
- <u>Is it rude to bring a bottle of wine you brought to a party back home with you if it was unopened?</u>
- Have you ever purchased a ticket from a scalper?
- Do you think emojis help or hurt people when it comes to expressing emotions?

And...

Favorite Beatle?

Paul. The answer is Paul.

Hoping you're well.

JD

The Most Embarrassing Story Ever (10/6/2018)

On today's episode of "Dreadfully-Embarrassing Things My Kids Said at a Mexican Restaurant..."

The Setting: Lunch-time in a crowded, noisy Qdoba with my two daughters (approximately age 7 and 4, at the time).

7-Year-Old (talking loudly over the restaurant chatter): "Daddy, why do some mommies change their last names when they get married?"

Note: My wife did not change her last name.

Me: "Well, honey, some people want everyone in their family to have the same last name and others have reasons not to."

7-Year-Old *(channeling Veruca Salt)*: "Well, I'M not changing MY name when I get married..."

At this precise moment, the entire restaurant coincidentally goes completely silent.

7-Year-Old (voice booming): "...because I love DICK!"

Yep. It was that bad. I swear I heard a record scratch. Then, the disapproving stares. The awkward silence. Then, the murmurs. It felt like an eternity.

Why am I sharing that story right now, years after it happened? Because you deserve a chuckle on a Saturday morning. And, because moments like that taught me how little I ever thought about gender norms before I had daughters.

How do dads explain to little girls why wives take their husband's names and not the other way around? Why has there never been a woman president? Why don't most religions allow female clergy? Why do female pro athletes make so much less money than male athletes? Why do women make less money than men everywhere? Why, why, why?

Maybe you have satisfying answers to those questions. Maybe you believe many of the ills facing our country stem from the dissolution of traditional gender roles and family constructs. Maybe your religion just says so. Fine. I get it.

Good luck explaining that to a 7-year-old girl who doesn't know how to spell the word 'patriarchy.'

If you read this email regularly, you know we don't touch things like the Kavanaugh controversy. I have no idea who's telling the truth and who isn't – and like I always tell you, we're in the truth business.

Is there a "war on men" happening right now? Perhaps. Does that suck? Sure, all war sucks.

But has there been a war on women for thousands of years? Abso-fucking-lutely. And if you see otherwise, get a service dog, because you're blind.

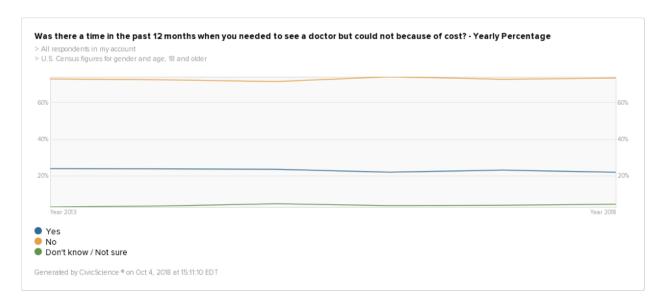
Here's what we're seeing right now:

Consumer confidence stayed eerily flat again. For the second consecutive reading, our Economic Sentiment Index barely budged, continuing a period of stagnancy unprecedented since we began measuring it 8 years ago. We saw subtle nuances if you care to <u>read the details</u>. There's just something weird about it when everything else in the country feels so volatile.

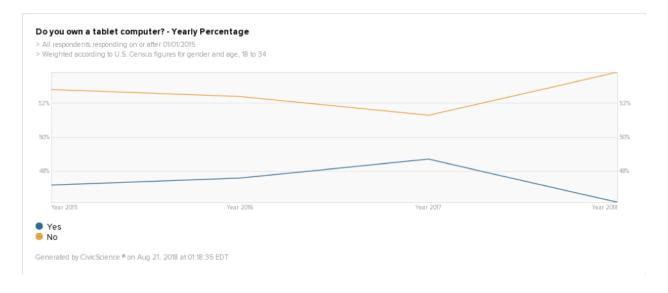


CBD has the potential to be a formidable niche product category. I wasn't hip enough to know much about CBD until I read my way through a short study we did this week. Apparently, it's marijuana oil that doesn't get you high. Doesn't that sound appealing? It must to some people because our new trend adoption model predicts that it could reach a market greater than 20% of the U.S. adult population. Millennials have driven early usage (because they're the cool kids) but the upside looks highest among Xers. The unifying thread across generations is environmental consciousness – which I told you last week was more of a Gen X proclivity.

Even in our rosy economic times, one in four Americans still can't afford to go to the doctor whenever they need to. When you think about all that's happened since 2013 – the Affordable Care Act, rising consumer confidence, tax refunds – it's crazy how consistent this number has remained year over year. Obviously, something is still broken.



Millennials aren't buying tablets anymore. Ok, that was hyperbolic. They're just not buying them nearly as much as they used to. Tablet ownership peaked in the U.S. in 2017 and has been sliding slightly ever since. Most of the decline is coming from our favorite over-hyped cohort, who maybe feel like their larger smartphones already do the trick. It's worth noting, however, that we aren't studying kids under 13 – nearly all of whom in America have school-issued tablets. Maybe they'll carry that habit into adulthood and we'll see a tablet renaissance someday.



Wealthier people are less likely to spend the extra cash on extended product warranties. This made more sense, the more I thought about it. We found that 10% of people purchase the extra warranty "all the time" when buying big-ticket items. 51% do it "sometimes." Warranty-buyers are more likely to be female, but the <u>largest correlations were</u> income-related. People making >\$100k annually are the least likely to purchase warranties, by far. That was counterintuitive to me at first because you'd think those higher earners could shell out a few extra bucks at checkout. But no. They're just not worried about replacing the whole item altogether.

Most Popular Questions of the Last Couple Weeks

Ever since I started sharing these every few weeks, somebody always gives me a hard time when I don't. Judging by all the clicks, I guess you like them. So here are the latest (as you know, click to answer them and see the results):

- o Are you good at keeping in touch with old friends?
- o Have you ever contested a ticket in traffic court?
- o Did you talk about the Kavanaugh / Ford hearings with your friends?
- o Do you think more stores should be dog-friendly?
- o Are you good at killing houseplants or keeping them alive?
- o Anchovies: love them or hate them?
- o Do you think hypnosis is real?
- o Have you ever dated someone you worked with?
- o Do you find it impolite when people ask what you do for a living right after meeting them?

Enjoy!	
Hoping you're well.	
JD	

My Unfortunate Last Name (12/8/2018)

I'm officially disqualified from Dad of the Year consideration again.

My 6th-grader couldn't log into a classroom app because it flagged her last name as obscene and apparently the teacher made quite an ordeal about it. Poor kid.

All I can do is say I'm sorry.

My dad always taught me that good offense was the best defense. I knew more Dick-related humor by the time I was 10 than Eddie Murphy accumulated in his entire career.

It would go something like this:

Them: "Hey John, is your dad's name, Harry?"

Me (deadpan): "No, it's Isaac."

They would stare, blankly, as the joke flew over their head. Inevitably, they would mumble it to themselves – like you just did – and the tables turned. I had a million of those. By the time I rattled off several of them – "And, no, my mom's name isn't Anita" – everyone moved on.

Incidentally, my mom's maiden name is Harden and you can't make that up.

When all else failed, I have a couple of once-broken bones in my right hand and a scar on my forehead from resolving the matter through less peaceful means. Win some, lose some.

I often embraced it (pun not intended, I swear) as I got older, using the name to my advantage, like when plotting a run for Greek President in college. "If you think all candidates are the same, you don't know Dick." Or, "The women of Alpha Beta Gamma love..." Well, you get the idea.

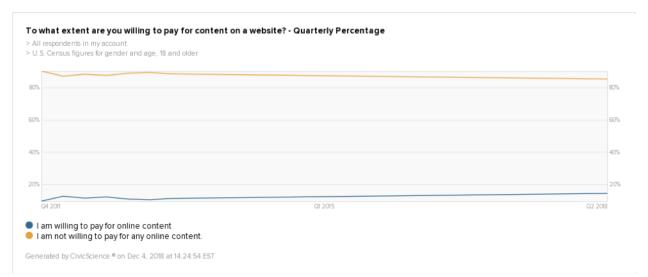
It reemerged (stop it) when Tara was pregnant, and we started researching baby names. You can't imagine the long list of girls' names we had to banish – not including names like Candy, Crystal, or Aida that we wouldn't have considered anyway.

Now, we're in a new phase, as our girls embark on life. Maybe it's generational but my kids are too compliant to rattle off Dick-isms in a crowded lunchroom or punch someone in the face to play defense. I just have to hope it makes them stronger in the long run.

For me, I feel like it's been a net positive. People certainly remember my name. And, I just got to regale you with a veritable bouquet of Dick jokes and you're not even allowed to be offended. That's worth something, right?

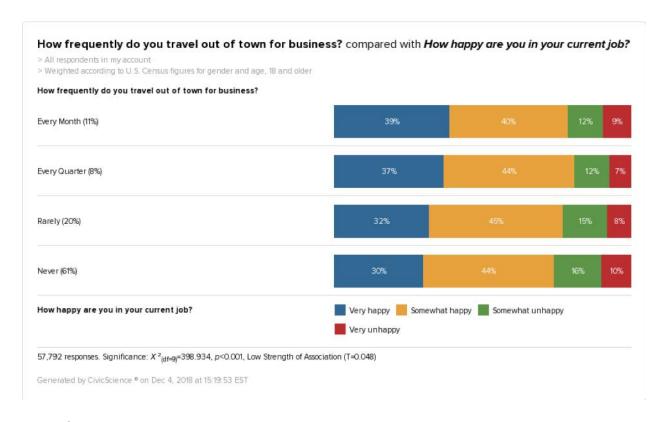
Here's what we're seeing this week:

Information inequality is the evil younger sibling of income inequality. If you don't read Sara Fischer from Axios, you're doing it wrong. Her piece this week about the threat of "media haves and have-nots" reinforced one of the most troubling trends we've seen in our data over the past seven years. As more and more journalism moves behind paywalls, quality media is landing on the screens of the most educated and higher-income consumers — leaving sketchy, programmatic-ad-supported content for everyone else. We're going to publish a ton of new research on this topic in the coming months but for now, just know that the percentage of people who are willing to pay for digital content is small and barely growing.



A lot of people are okay with genetically modifying human embryos to prevent diseases. A researcher in China was recently able to "edit" the DNA of two human embryos to render them HIV resistant, using a controversial technology called CRISPR. We asked the American populous what they thought and the results were surprising – to me a least. 43% of Americans are okay with the practice, if it's focused on mitigating a child's chances of disease or defects. 24% would support the practice to prevent obesity and 27% to prevent addiction. Things changed dramatically when we asked about altering things like skin, eye color, height, or gender. Nobody wants that. The write-up is pretty thought-provoking if you want to give it a look.

The more people travel out of town for business, the happier they are. Also, you should never confuse correlation for causation. Check out the chart below. As a frequent business traveler myself, this seems counterintuitive – because flying commercial sucks, missing my kids sucks, and restless sleeping in hotels sucks. Maybe it just means those business travelers have better, higher-paying jobs that make them happier in other ways (that's my theory). Or maybe, those out-of-town travelers are leaving a non-traveling spouse at home to deal with the kids and responsibilities all by their lonesome, making the non-travelers less happy as a result. Or do people actually enjoy skipping town? What do you think?



I'm definitely not surprised that people who use social media the most are also the most likely to wear perfume or cologne. Still, <u>it's a useful data</u> point if you're a marketer for a fragrance brand or somebody at Facebook trying to sell ads to those marketers. I'm in the $1/3^{rd}$ of U.S. adults who never wear any kind of fragrance and so far nobody has complained to my face about it. But a bunch of people do, including 25% of Americans who spritz themselves every day. One interesting statistical nuance in this research is that fragrance-wearing peaks during our date-chasing 20s, then drops quickly in our 30s, only to bounce back up again in our mid-40s. Are these all divorcees getting back in the game? I hope I never know.

We always put up a live Christmas tree in our house but apparently, we're in a small minority. Lots of <u>cool holiday decoration stats here</u>. I just didn't realize that fake Christmas trees were 3X more prominent than real ones. Or, that most people unplug their tree lights when they leave the house. I don't even know you anymore.

Here were our most popular questions this week:

- o Is chili a soup?
- o Do you typically spend more or less if someone else is picking up the tab?
- o Do you let your dog sleep in your bed with you?
- o Do you expect a holiday bonus this year?
- o Eggnog or hot chocolate?
- O Do you think it's ok for kids to miss school to go on family vacation?
- Does wishing someone a happy birthday on social media count?
- o Holiday office parties: love them, ok with them, or hate them?

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Lonely at the Top (2/23/2019)

It's lonely at the top. Not that I know that first-hand.

Second-hand, though.

I've had the privilege over the years of building some special relationships with CEOs and VIPs of all kinds. Some of them pay us, some don't. Many of them are reading this right now.

The funny thing is that they think *I'm* advising *them*, flashing a bunch of data and insight they can't get anywhere else. But I'm learning way more than they are, sponging up everything I can about what they do and how they do it. I should be charging them, not the other way around.

Forget I said that.

When you start a company as a kid, you miss all the on-the-job education most people glean from a day-to-day boss. I had to spend my early career collecting mentors, sometimes predatorily. I would call, email, charm their admins, stalk them at events – even deliberately do free work for non-profit boards they sat on (true story) – anything to get that first meeting.

And that's what sucks the most about being the chief. Everyone wants something from them, every minute of every day. They live with their guard up, evaluating whether they can trust you or – more likely than not – what your angle is. Hardly an hour goes by when someone doesn't ask them for a promotion or raise, a donation, a sponsorship, a favor, or some other request.

People get outraged about CEO pay and I get it. They fly private. I'm not playing a tiny violin for celebrities who are hounded by the paparazzi or pro athletes who can't escape selfie-seekers either. They know what they signed up for.

But company leaders – save for an exception or two – don't enjoy the adoration side of the coin like actors, athletes, or rock stars. Nobody flaunts a jersey with their name on it or wears their eponymous perfume. They make brutally-hard decisions, stand in front of firing squads, and walk into every conversation wondering what you want from them. Most of them worked their asses off and made huge sacrifices to get there. It's not all roses and sunshine.

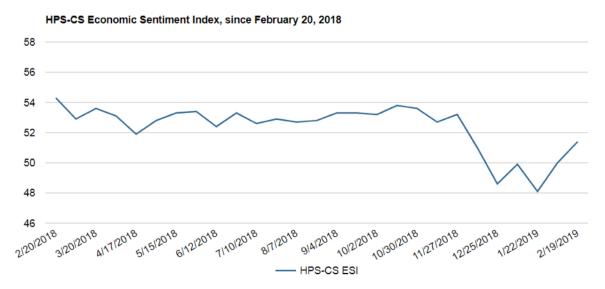
Sure, lots of them are jerks too. But I'd bet the jerk-to-good-person ratio among CEOs is no worse than you'd find anywhere else. They're just more visible.

I'm not asking you to do a telethon for the poor, downtrodden Fortune 500 CEO. But a little more empathy is never a bad thing.

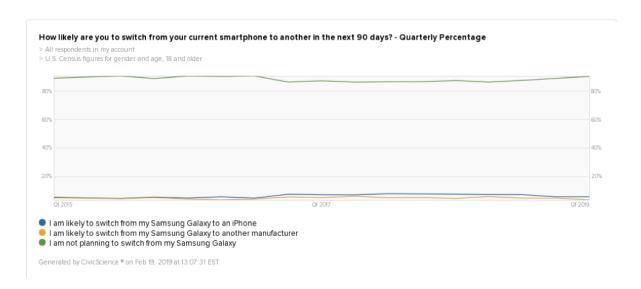
PS- I'll be in Seattle for a couple days this upcoming week. Always eager to meet up with my pen pals, if you're in that vicinity.

Here's what we're seeing this week:

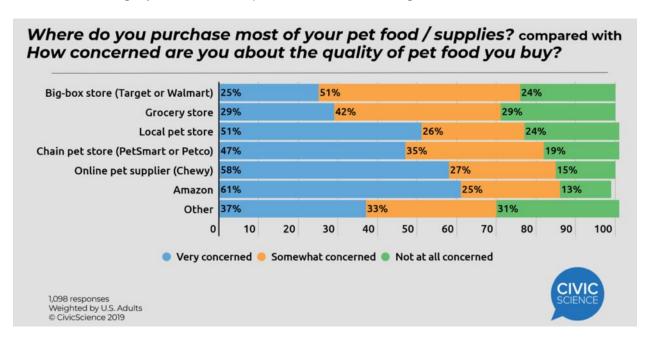
The run of consumer confidence ups-and-downs has ended...with a solid up. If two consecutive readings constitutes a trend, then <u>our Economic Sentiment Index</u> is officially trending upward. High levels of optimism for the U.S. economy, job market, and major purchases pushed our numbers to heights we haven't seen since mid-December. More rosy job figures and a well-received State of the Union address could have been contributing factors. Let's hope the trend continues.



With Samsung's big "Unpacked" event this week, loyalty among Galaxy smartphone owners has rebounded to levels not seen since the summer of 2016. In just the past few weeks, the percentage of Galaxy owners who show no indication of switching devices has reached its highest level in over 30 months, with a full 90% saying they plan to stay with Samsung. The dip was never that severe, even after Samsung phones were catching fire a couple years back. Though a small group, the likely switchers are disproportionately female, Hispanic, and Gen Z. People stick with their smartphone manufacturer, that's for sure.

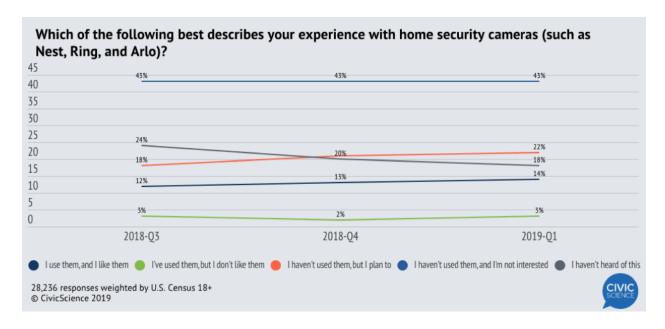


Online pet supply stores like Chewy are gaining real market share but watch out for Amazon, duh. We published an interesting study this week on Americans and their pet-food buying. Generally, the landscape looked as you'd expect, with big-box stores, grocers, and chain pet stores taking the lion's share. But online suppliers like Chewy (our provider of choice) have climbed into double-digit market share – particularly among busy Gen Xers like us. But don't sleep on Amazon – ever, by the way – because that's where more and more Millennials are turning for their pet goods. Amazon is also attracting the consumers who care most about the quality of their pet food, which is critical in a category where brand preference is so strong.



Smart home security cameras are poised for a breakout. Web-enabled home cameras like Nest and Ring have gained a few points of market penetration since last summer, with overall awareness of the category jumping healthily in that time. But the-biggest gains are seen in the intent category, with the percentage of people saying they

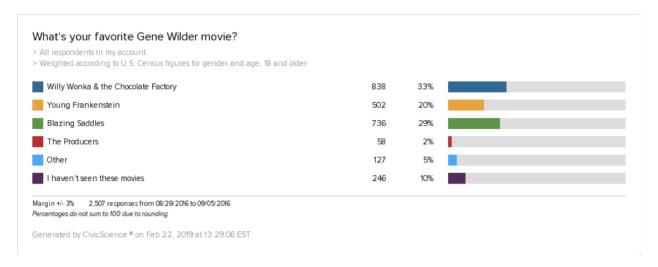
plan to buy one of these products leaping from 18% last fall to 22% this quarter. Logically, the largest group of intenders are home-owning Gen Xers in the suburbs. It all adds up to a market ripe for growth.



People absolutely love 'True Crime' television but they're not who I thought they would be. I'm an outlier in this case because the clear majority of Americans are into true crime TV shows and documentaries. 40% watch them regularly, which is insane. Half of those people watch it on Netflix and 1/4th on Amazon Prime. And 11% of people listen to true crime-related podcasts, to boot. It's worth noting that the TV audience is disproportionately female — only 35% of women say they have no interest in the genre, compared to 43% of men. We don't watch any of it in our house — except *American Vandal*, which is a hilarious knock-off.

Speaking of outlier, my daughter and I might be the only two people in America who tune in for the Oscars. This should come as no big surprise, given the terrible PR and dysfunction leading up to the Academy Awards this year, but the percentage of people who say they intend to watch is abysmally low. If there's any glimmer of good news for Hollywood, Gen Z kids seem to be more interested than anyone else. As you'd expect, the few people who do plan to watch are decidedly more female, fashion-oriented, and way more politically liberal. Not a lot of Trump supporters in the Oscarloving crowd, it turns out.

One Random Movie Stat That Has Nothing To Do With The Oscars



I'm just stunned that 10% of people have never seen a Gene Wilder movie. He's a legend.

Hoping you're well.

JD

My Druncles (3/9/2019)

The first person I ever smoked pot with was my dad. We were fishing in Florida with two of my mom's brothers (aka: "my druncles"). I was 17, I think.

Also, my mom reads this email so I'm sure she's more appalled by that revelation than you are.

My dad was the best man in my wedding, which I've told you before. He taught me honor, generosity, loyalty – and a twisted sense of humor. We golfed together, played poker, pool, and fantasy football, hunted, fished, cooked, traveled, cheered for the Steelers, bitched about the Steelers, and elbowed each other in the side whenever a beautiful woman walked by.

He died 53 months ago and I still reach for my phone to call him nearly every day.

It kind of happened out of nowhere. We went to the bar together a few days before and he was right as rain. Top of his game. Then, boom.

I would do anything to have another year with him, but I know he would've rather cashed out then – at a healthy 74 – than have someone wipe his ass or remind him who my sister is. I get it. Let me drop dead at a full-faculty 82 and I'll sign up right now. Guaranteed.

So, I don't grieve. Because I know he wouldn't want me to. And because he prepared me for life without him. And because I believe I'll see him again.

We were as close as any father and son have ever been. So much that I prayed for a boy of my own – which is why God gave me two daughters. Because I could never replicate what I had with my dad. And I would have been a fool for trying.

But I'm working hard to be that close with my girls. I haven't smoked pot with them obviously. It'll be legal everywhere by the time they're 18 anyway, which takes all the fun out of it.

We're close in other ways. Noelle shares my love of cooking and action movies; Maddie, music.

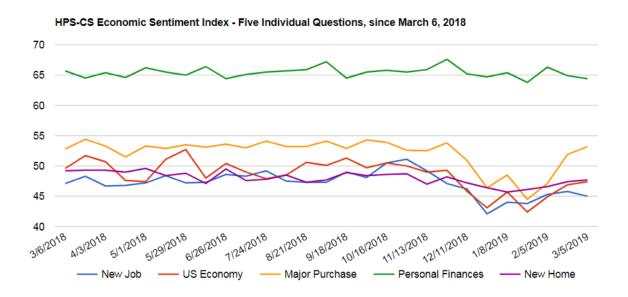
I'm teaching them confidence, joie de vivre – and a twisted sense of humor. Tara is teaching them self-reliance and impeccable taste in life partners.

Hopefully they learn humility from their coaches and teachers.

And hopefully they'll think half as fondly of me one day as I do of my parents.

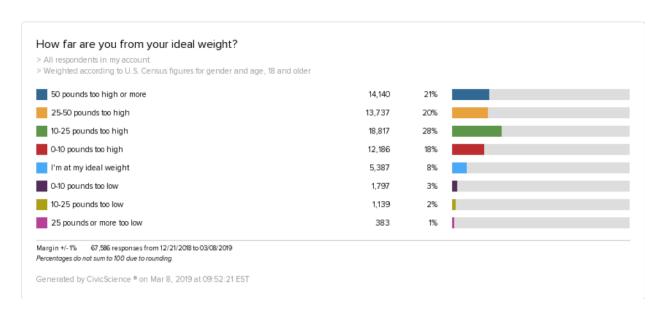
Here's what we're seeing this week:

Consumer confidence continued its upward swing, if subtly, over the past two weeks. Buoyed by a particularly strong finish to the reporting period (March 2-6), our Economic Sentiment Index rallied into positive figures for the third straight reading. The big push comes from consumers who feel good about the environment for major purchases like homes and cars, which typically bodes well for secondary expenses like home improvement projects, major appliances, and even vacations. One thing to note, however: Look at the little downward tail on the blue line below. Maybe people shouldn't have been so surprised by the sour jobs report yesterday.



When it comes to car insurance, cost matters most – until privacy gets in the way. This study taught me a lot about the auto insurance category and it was more interesting than I would've expected. If you've ever wondered why State Farm, Progressive, and GEICO buy seemingly every other commercial on TV, it's because 90% of Americans need their services. The majority of those people don't care about the reputation of the company they choose or even the coverage (until they get older). Price is king – to a point. Only 14% of drivers are willing to let insurance companies track their driving habits in return for lower rates. That's down from 18% in 2017.

Holy shit, we're fat. Take a look at the eye-catching chart below from a survey of over 67,000 U.S. adults. I'll do the math for you: 87% of Americans think they're overweight. 87%! One in five think they're 50lbs+ overweight. We're doing a deep study on this (which I'll of course share with you) but the correlations are endless. First, the more overweight someone believes they are, the more likely they are to be female – which says more about body image than actual weight. Ugh. Other high correlations? Parenthood, rural-ness, income (of course), race, social media usage, and basically everything else you can think of. Oh, and the results were way different before Christmas than they are now. Stay tuned. We're going to do a lot with this.



To say that a majority of Americans believe Netflix movies should be eligible for Oscars is the understatement of the century. After Steven Spielberg told Netflix to get off his lawn last weekend, we quickly ran a question through our system to confirm what anyone who knows how to open a web browser already understands. The world has changed. 77% of U.S. adults believe Netflix and other made-for-streaming movies should be eligible for Academy Awards. 23% disagree. That's 3-to-1. In today's divided America, that almost never happens.

Lyft still has a long haul before they catch Uber, but there are reasons to think they can. After Lyft filed for their IPO last week, our team of analysts plowed through a bunch of our data and found some pretty fascinating things. Not surprisingly, Uber is still much more popular, with 53% of consumers preferring them over Lyft (22%). The future, though, might be more promising for Lyft. For one, over half of Lyft fans are Millennials. Second, and somewhat related, Lyft riders are much more comfortable with the idea of self-driving vehicles, which is the long-term bet everyone in the transportation industry is making.

Here are some of our most popular questions of the past few weeks:

- Do you usually read the "Terms and Conditions" of an agreement in full?
- o Are you giving up something for Lent this year?
- o Do you see eye to eye with your partner on politics?
- Are you shared on your spouse/partner's phone location?

Hoping you're well.

JD

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