



# THE BEST OF WHAT WE'RE SEEING

*an informal Saturday email to CivicScience clients, friends, and other VIPs*



# INTRODUCTION: JOHN DICK, CEO



Hi.

There are few things I enjoy more than sitting down to write our weekly What We're Seeing email. I get to reflect on a week of interesting research, indulge in talking about myself, and shine a spotlight on the awesome company we're building at CivicScience.

But nothing beats the emails I get in response every week. I've made wonderful Pen Pals, most of whom I've never met in person, from all areas of business, media, entertainment, sports, politics, Wall St. and everywhere in between. I've heard funnier stories than I could ever spin myself, gained incredible insight into the topics we study, and had some meaningful, heart-to-heart exchanges with complete strangers. The fact that even a few people find some small Saturday morning pleasure in my musings makes all of the effort worthwhile.

We've even generated a lot of valuable business from it., I have to admit. The caliber of companies and executives we work with aren't reachable through cold-calling or spam emails. The wager we've made as a business is that if we just keep sharing our data and our perspective - and a bit of personality to go along with it - the right people will come to us. It took time to lay that foundation but now it's working like a charm.

If you had bet me two years ago I would still be writing every week, I'd be bankrupt. I figured I'd run out of good material at some point - and I still might. I told some of my very best stories when the readership was still tiny and regretted that I may have jumped the shark. Fortunately, the crazy world we live in right now writes half of the content for me. And with two kids, a chaotic business, and a personal knack for finding myself in embarrassing situations, I seldom have to look far for a worthy conversation starter.

So, whether you're encountering What We're Seeing for the first time, whether you were late to the party, or whether you've read it religiously from the beginning, I hope you will enjoy looking back at some of our favorite installments from the past two years.

Let me know what you think. And, I promise, if you keep reading, I'll keep writing.

Hoping you're well.

# WHAT THEY'RE SAYING



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## The Kickoff (10/29/2016)

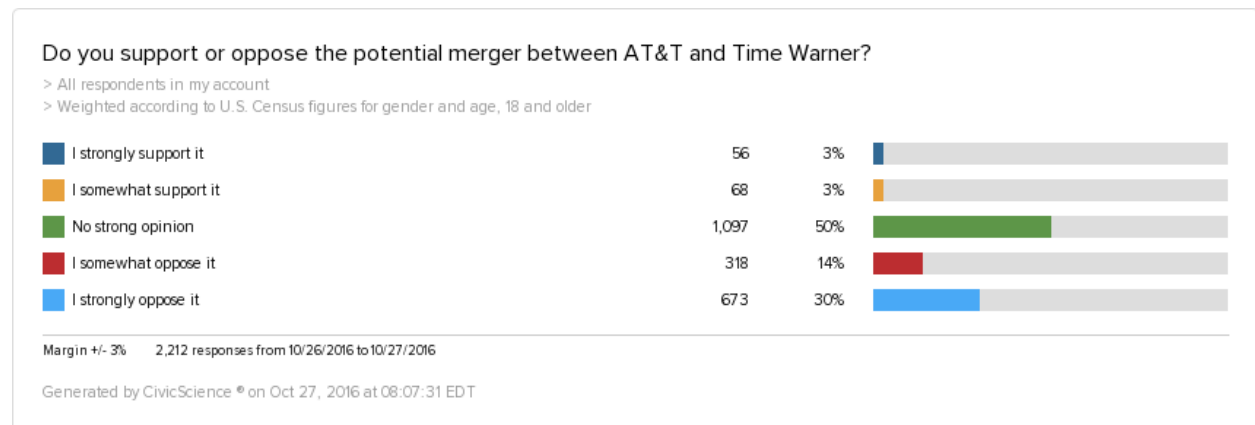
This is the first in what I hope will become a weekly write-up for my VIP friends about the interesting, important, and quirky things I'm finding in our data. I hope you enjoy it. And please, feel free to share it. If anyone would like to be added to my distribution list, please forward their email address. I'd love to hear your feedback.

It has been a busy week of research at CivicScience. Significant growth in our poll response numbers allowed us to cover a litany of new topics – which is a good thing because there's no shortage of major news in the worlds of business, media, and, yes, politics.

Here are a few things we're seeing right now:

### Consumers are NOT fans of a potential merger between AT&T and Time

**Warner.** Fortunately for the companies, the majority of Americans don't have a strong opinion on the matter. But, among those who do, 60% strongly oppose the merger. See for yourself:



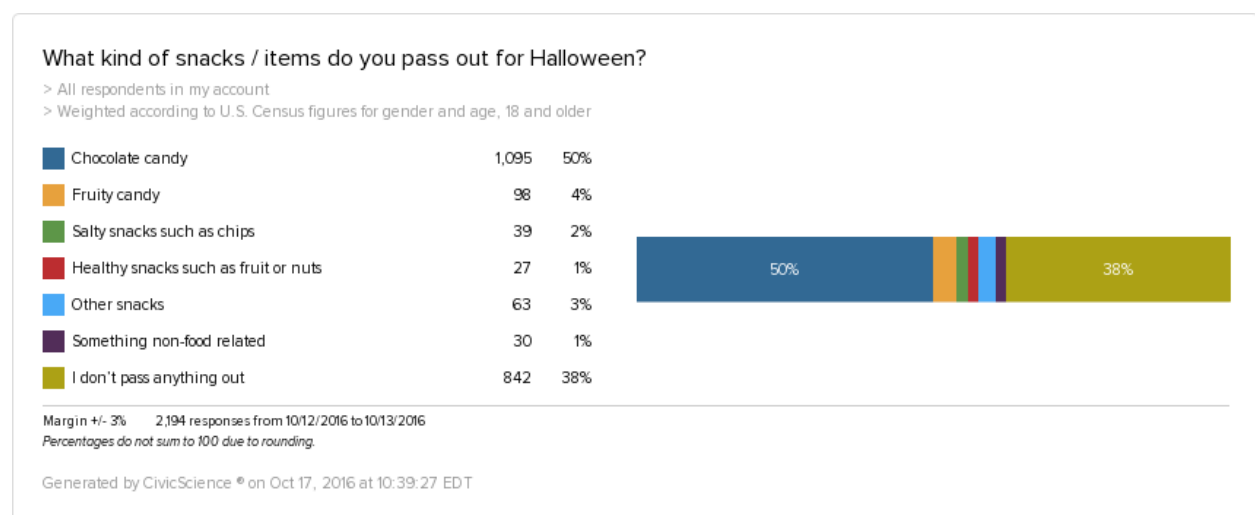
**Local TV news is America's most trusted source – but the bar is pretty low.** Our media guru Annette Brady wrote an insightful article about the decaying levels of consumer trust in the U.S. media. She found that a whopping 58% of Americans do not trust any form of news media. Among those who trust some media, local TV news earned the highest marks. But, considering no other news source garnered more than single digit percentage levels of support, that isn't saying very much. [See the details here.](#)

**Healthcare costs continue to be a major drag on restaurant spending and it's likely to get worse.** One of the bigger news stories this week was confirmation from the White House that insurance premiums for Affordable Care Act enrollees will see a big spike next year. While this is bad news for consumers, restaurant industry executives can't be thrilled either. [As I wrote a couple weeks ago](#), rising healthcare costs are the primary culprit behind the recent unexpected downturn in restaurant traffic. Things may not improve anytime soon.

**It's not cheap to get a mammogram either, and that's a problem.** In honor of Breast Cancer Awareness month, we've done a series of studies on the deadly disease, medical care, and related charitable activities. Despite all of the pink ribbons and other awareness efforts, an alarming number of women still don't see their doctor for regular mammograms. The number one reason? Cost. See the [other deterrents](#) here.

**Sugar is fast becoming public enemy number one.** We noticed an interesting trend in one of our tracking questions, which gauges the factors consumers believe are most harmful to their nutritional health. Although "preservatives and chemicals" have remained the number one taboo for two straight years, "sugar" is fast approaching the top spot. Carbs and GMOs occupy the bottom of the list. [Take a look](#).

**But Halloween is still for chocolate lovers.** Despite the anti-sugar trend, people aren't afraid to push sweets on our kids on Halloween. The most popular treat to give this year? It's not even close:





Before you get angry – like I did – at the 38% of Scrooges who don’t pass out any treats on Halloween, give them a break. [Our data suggests](#) that most of them live in remote rural areas or apartments buildings, where a lot of little kids don’t come knocking.

**To go along with racism, sexism, and religious intolerance, the Presidential election is exposing yet another fissure in America – ageism.** Dana Millbank from the Washington Post wrote [a brilliant but pointed article](#) about Baby Boomers – the very group most likely to support Donald Trump – and their role in making America “not great” in the first place. Millbank pointed out that Gen Xers were the least likely of all generational cohorts, even more than Millennials, to reject the idea of a Trump candidacy. [Our numbers](#) show the same thing. Gen Xers aren’t thrilled about our country today, but they don’t think Trump is the answer.

**The polling industry is a hot mess.** The [Wall St. Journal published a thorough piece](#) about the troubles facing the polling industry (if you don’t have a WSJ subscription, just paste the URL into a Google search box). The author could have gone further, highlighting the fact that people who belong to online survey panels look nothing like the real world, either demographically or psychographically. Or they could have shown how approximately 1 in 4 respondents to Google Surveys give erroneous answers just to reach the content they’re being blocked from. My favorite part of the article? The Pew Foundation tested 9 online survey providers to see if any could match the “real” number of U.S. adults who smoke cigarettes every day. None of them got the answer – 13% – correct. So I checked our numbers:



Have an awesome weekend.

**JD**



## The Election Hangover (11/12/2016)

Good morning everyone. I didn't have the time or much emotional energy to dive into our data very much this week.

So, for now, I just want to share an article I wrote on our blog the day after the election – looking at the implications of the election on the polling industry and why, even among a million other major challenges, we need to care about it. Read it if you have a few moments.

### What the Hell Just Happened?

When I put my 9-year-old daughter on the school bus this morning, I had some pretty deep thoughts about the world I was sending her off to. I also had a random morbid thought – a mental image actually – of the bus running over a bunch of political pollsters who were being thrown under it.

As a company started eight years ago on the premise that traditional polling was headed down this path, you'd think we might be feeling some kind of affirmation today. I took a lot of flak for keeping our business out of the [lucrative political polling game](#) this cycle. I certainly was tempted. Thankfully Ross McGowan, our head data scientist, kept my head on straight. He knew something was off. He knew that [our solution wasn't](#) ready for what looked to be such a complex election.

Can we measure how people feel about fast food restaurants or smart phones or the NFL? Yes, better than anybody. But none of those topics evoke the kind of visceral, emotional underpinnings – at the scale and complexity – of a national election. We always tell our corporate clients, “Regardless of the research method you use, if something comes back 51 to 49, don't bet your business on it.” In politics, we have no choice but to bet the farm on 50.1 to 49.9.

### GIVE THE POLLSTERS A BREAK

But, no, we're not finding any joy in the ill-fortunes of the pollsters. For one, they weren't as tragically bad as the prevailing narrative would have you believe. It's looking like Hillary Clinton will end up winning the popular vote by about 1%, after the California tallying is

complete. Pre-election polling averages had Clinton winning by about three points, well within any single poll's margin of error.

Ironically, the LA Times, who conducted the one national poll consistently showing Trump ahead, was [seen bragging about it](#) late last night. The problem with that? Their final numbers showed Trump winning the popular vote by three points, which means they were actually MORE wrong than the others – just wrong in the right general direction.

The pollsters performed much less impressively at the state level. Polling averages consistently had Clinton ahead by roughly four points in Pennsylvania and Wisconsin and two points in Florida and North Carolina. She lost them all. Still, at least mathematically, it wasn't abject failure. Most polls were off by 3-5 points, still a reasonable margin, depending on the sample size. Being 95-97% correct gets you an A in most schools.

## **WE DON'T YET KNOW WHY THE NUMBERS WERE WRONG**

The problem isn't that the pollsters erred. It's that they all (well, almost all) erred in the same direction. They all missed something. There was clearly a widespread underestimation of support for Donald Trump, an overestimation of enthusiasm for Hillary Clinton, and a general miscalculation over who would vote and who would stay home. We saw signs of this in our internal data, we just couldn't completely put our finger on it or quantify it at a level that made us confident.

We will spend the next few weeks digging into our numbers to see what kind of light we can shed on all of this darkness. My preliminary look at things tells me that certain people, namely a lot of blue-collar Democrats and white women were either dishonest with pollsters or avoided them. We wrote over a year ago about [the emerging effects of social shaming and retribution](#) on how people share their opinions. It's a very real and tricky thing.

It also looks like groups of non-frequent voters turned out while many frequent voters did not. But those are over-simplifications. We will report back when we know more. And we won't be the only ones.

## **WE ABSOLUTELY HAVE TO FIX POLLING**

I know that panicking about the polling industry may seem a bit melodramatic, given all the other problems people are coming to terms with today. In fact, driving a school bus over the polling industry might actually make a lot of people feel better. We may even have a right to be angry at all of these polling firms (and the media who propagate them) for misleading us with their confidence and scientific conviction – a lot of people were very irresponsible.

**The truth is that we cannot have a healthy society without reliable public opinion polling.** We've been [screaming it](#) from the rooftops for years. And, I'm not just saying this because we need to be better at predicting election outcomes. That's the lowest and least valuable form of polling in my opinion.

No, we need trusted and reliable public opinion research so that we can prevent [the kind of socio-political blindness that got us here in the first place](#). Perhaps if we didn't only ask people how they feel every four years, we could anticipate and address voter discontent before it engulfs us. If we listen to real people every day – not just the media and intellectual elites who dominate Twitter – maybe our leaders could be more informed and attentive. We need to put our brains together to make this happen.

I'm sad that our nation is so divided. I'm sad that so many people are angry and hurt. But I'm also sad that everyone is so surprised. The greatest country in the world should never be this dumbfounded.

**JD**

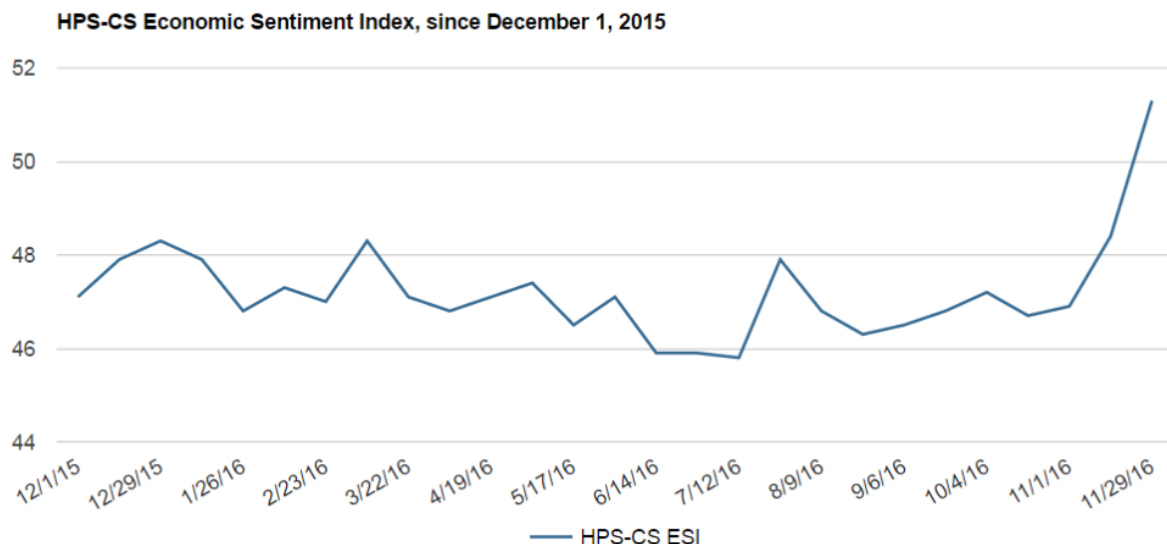
# The Consumer Confidence Turning Point (12/3/16)

I hope you had a great extended holiday, free from family political arguments – unlike mine.

We're heading down the home stretch of 2016 and into what should be an interesting year ahead. I've been studying an array of macro-economic sentiment factors, as I'm convinced these are going to dictate consumer behavior through the holidays and well into next year.

Here's some of what we've been seeing on the macro level and beyond:

**Overall consumer confidence is higher than it's been in over two years.** Our most recent [Economic Sentiment Index reading](#) shows a continued surge since the election, driven most recently by increased optimism around the job market – confidence which preceded yesterday's glowing jobs report.



**This confidence may have provided a much-needed boost to Black Friday traffic.** Although our tracking numbers showed a [slower pace](#) of shopping before Thanksgiving, compared to last year, the [numbers leapt ahead](#) following last weekend. Will it continue?

**For holiday retail advertising and beyond, television networks should expand their use of split-screen advertising – it's a winner.** Made vogue by NBC's Ryder Cup

broadcast, the practice of showing muted coverage of a live sporting event on half of the screen, while commercials run on the other half, is being [met with rave reviews by consumers](#). Don't be surprised if this becomes more commonplace as networks look to keep eyeballs on their ads.

**What doesn't seem to be catching on is the new tradition of "Giving Tuesday"** – a day of promoted charitable giving, which happened this past week. If you've never heard of Giving Tuesday, you're hardly alone. In fact, you're in the majority. And that's the problem. Participation in the event was [completely flat](#) versus last year. Where's all the love?

**But to restore your faith in humanity, we're pleased to report that the "Age of the Kardashians" might be nearing its merciful end.** After being relatively flat for over two years, [negative sentiment toward the famed-for-nothing reality stars](#) climbed significantly in 2016. Maybe the family's 15-minutes (which has seemed like 15 years) is nearly over.

On that note, have an awesome weekend.

**JD**

PS – I've added a few new names to this distinguished distribution list. If you'd like some of the archived emails or just want to know what it's all about, feel free to email me personally. Nobody has unsubscribed yet 😊



## Gen Xers are Exhausted (1/20/2017)

Remarkable times we're living in to say the least.

Here are a few things we've been seeing through the fog:

**Maybe Gen Xers are gearing up for four years of hibernation.** We noticed an interesting trend in [our data about sleep](#) over the past year. The number of Gen Xers who reported getting at least 6-8 hours of sleep per night rose a full 5 percentage points in 2016. Perhaps my over-working, over-parenting, over-stressing peers are finally starting to take care of themselves. Or maybe we're just exhausted.

**And everyone seems to be chilling out about consumer privacy.** We don't often see many time-graphs that look like a double-black-diamond ski slope, but this is pretty close.

The [drop is evident](#) particularly among Baby Boomers and older Gen Xers. Is it because people feel safer? Or have they accepted that privacy trade-offs are worth the conveniences of technology and free content on the web? Or have they simply decided it's a battle they can't win? We don't know for sure but we'll see if we can find out.

**"Light" restaurant diners might be the industry's best hope.** You might be getting bored of all the restaurant-related stuff I cover. But I can't stress enough how important we believe the industry is, both in terms of its direct economic impact and its correlation to and ripple effects across the broader economy. Given the [brutal headwinds](#) the industry is facing, we keep looking for ways restaurants can win. At least for now, it looks like there is more opportunity to [grow among less frequent diners](#), particularly in the QSR category.

**If you're looking for other reasons to be hopeful this weekend, maybe our country isn't quite as polarized as it might appear.** On a purely personal crusade, I set up an experiment to see if every Trump supporter is as universally optimistic and/or every Trump detractor is as universally despondent as my Facebook feed would have me believe. If you don't want to [read my full article](#), here are two nuggets: Republicans are clearly not thrilled with Trump's use of Twitter. Democrats are most optimistic (or least pessimistic) about the economic outlook. I'm not expecting a revival of Hands Across America (did I just date myself, or what?), but there's at least a glimmer of possibility that people can moderate their opinions when pressed to do so.

That's it for now. Have a great weekend. Oh, and Go Steelers.

**JD**

PS – On a quick logistical note: A number of you have asked me how your friends or colleagues can sign up to receive my little Saturday ramblings. The answer is easy: **They can't**. But if there's anyone, in particular, you would like me to add, please pass along their email address. And, of course, you're welcome to forward it to anyone you want.

I'm super-proud of the response I've been getting – including the open rates (an unheard-of weekly average of almost 70%) and the fact that not a single person has unsubscribed. I really want to maintain that streak, so please keep the feedback coming.





## The First Cracks in the NFL (2/4/2017)

If you follow me on the social webs, you probably noticed that I wrote more this week than I have in months. More and more people, it seems, are coming to us looking for perspective – or at least hard numbers – to explain whatever the hell it is that's going on right now. I'll admit, it's good for business. But I could use a little more sleep.

Here are a few of the many things we saw this week:

**On Super Bowl eve, I'm pessimistic about the long-term health of the NFL and the sport of tackle football in general – if things don't change.** I looked back at data we studied on concussion concerns among NFL fans in 2012. The numbers were eerily similarly to the [same research we repeated this week](#). It's evident that these concerns are having a serious influence over parents' – and therefore their kids' – willingness to play youth football.

**In related, if not correlated news, the percentage of people who say they are planning to [watch the Super Bowl](#) this year is down substantially over last year.** No surprise: It looks like the political environment might be to blame. As a huge NFL fan (and an American), I hope this can all be fixed.

**Baiting Donald Trump into attacking your company on Twitter might be a brilliant growth strategy.** On Thursday, after the NY Times reported record increases in Q4 digital subscribers, [we took a closer look](#) at our own NY Times readership data over the past few years. Not only have those numbers jumped considerably over the past 6 months (continuing through January) but the composition of those readers is evolving as well.

More women, more middle-incomers, and – get this – more Republicans, are reading the NYT. It's simple math: More people dislike President Trump than like him, and the negative sentiment is much stronger than the positive. For the right (or *left?*) brand, being on Trump's bad side could endear you to a bunch of new customers.

**On a more superficial note, people are becoming more – well – superficial.** I give a very popular talk (which involves me singing an a capella rendition of *Mercedes Benz* by Janis Joplin) on the impact of peer pressure and social ambition on our online behaviors.

The basic premise is that we present a curated version of our ideal selves on social media, and it's beginning to affect our consumer choices. We found [great fuel for this theory this week](#), discovering a remarkable parallel in the growth of Instagram and a rise in people who are interested in getting plastic surgery. Maybe it's a coincidence. You decide.

**If you're a LaCroix sparkling water fanatic like everyone in my house, you're not alone.** Flavored fizzy water is growing like crazy, as an alternative to colas and other sugary drinks. Here's how I know I'm becoming a cliché – [the correlation](#) between drinking red wine and drinking flavored sparkling water is off the charts. Guilty as charged.

I'll be in Denver next week if any of you are in the area. And I'm always looking to make new friends.

Have a great weekend.

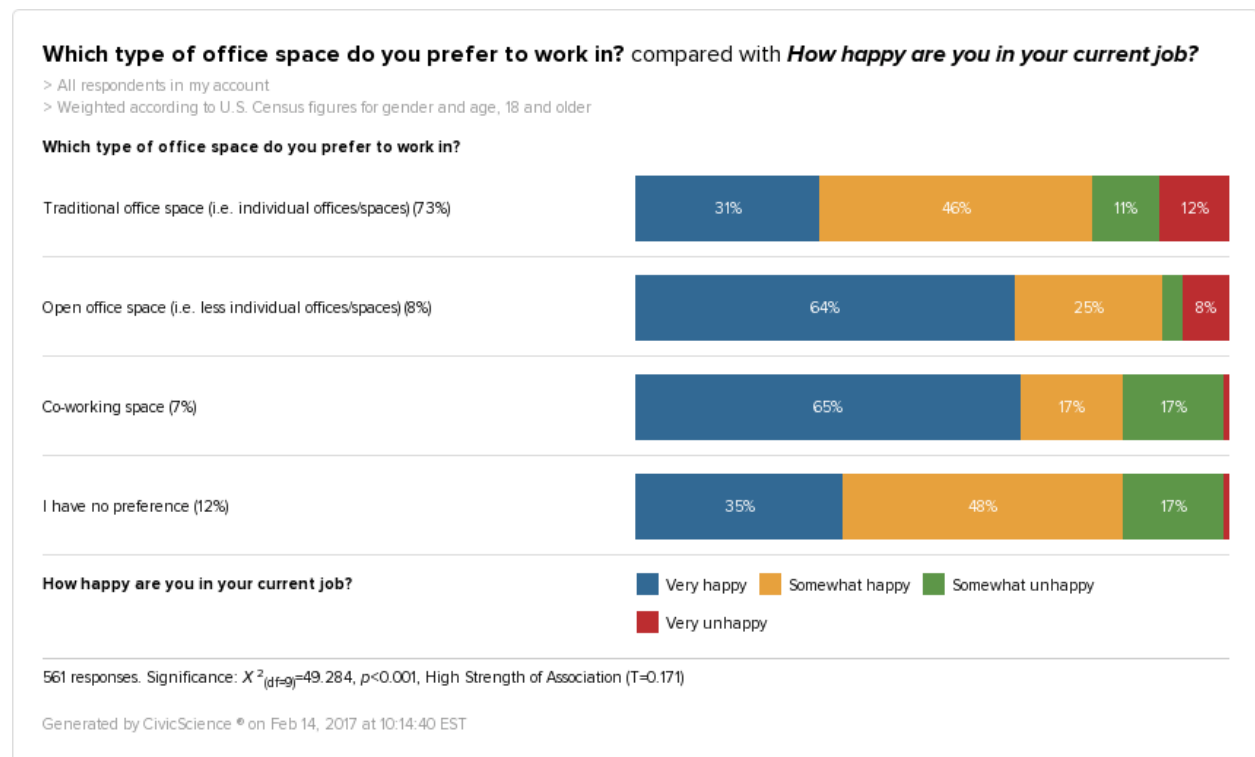
**JD**

## Millennials & the Loss of Empathy (2/11/2017)

Try as I might, it's pretty hard to come up with interesting content for all of you that isn't somehow Trump-related. The President is casting a huge – and possibly unprecedented – shadow over not only the political landscape, but brands, media, and the markets as well. You might be getting tired of hearing about it. So, I'll do my best to lighten things up.

Here are a few of the things we saw this week:

**The clear majority of people still prefer traditional office space where they work – or at least they think they do.** With the rapid emergence of co-working space and open floor plans, [two-thirds of U.S. Adults still prefer traditional space](#), with closed offices, cubicles, and conference rooms. Notably, even Millennials choose traditional over non-traditional space, 48% to 28%. HOWEVER, look what happened when we crossed our office space question with our standard job-happiness question:



We have a wide-open floor plan at CivicScience – and as I've said before – I love my job.

**We did an [extremely important study](#) on which QSR or Fast Casual brand has the best French fries.** Hold on to your hats. The answer was McDonald's, by a mile, followed

by Five Guys and Chick-fil-A. These rankings were virtually identical to the same question we asked a year ago. That's the kind of deep, life-altering insight you can expect here, folks.

OK. I held off as long as I could.

**Trump's interaction with brands is definitely having an impact – it's just not consistent.** Last week, I promised you some insight into consumers' reaction to Nordstrom and Under Armour, in the wake of their respective Trump-related news. We're still not ready to share complete findings because the numbers are, well, complicated. But here's my initial take: For both brands, the biggest changes are happening among consumers who previously had no strong opinion about them. And those people are split almost equally in both directions, along party lines.

**This means that for a mainstream brand like Under Armour, the good news and bad news balance each other out.** Current brand consumers don't seem to be affected one way or the other.

**Nordstrom, however, might see some net negative impact among its existing customer base.** I admit that I didn't expect this. I was reminded that a surprising number of upper-middle-class white women voted for Donald Trump in November. Guess who shops at Nordstrom. Yep. Now, whether these pro-Trump consumers protest with their wallets remains to be seen.

Stay tuned and...

Enjoy life,

**JD**

## Don't Be An Asshole to Your Kids (2/25/2017)

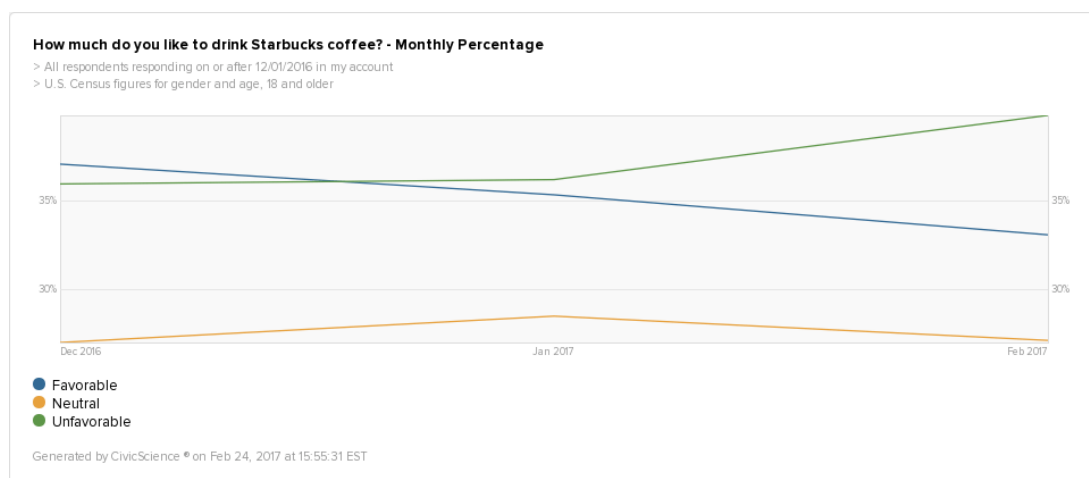
It's 78 degrees in Pittsburgh as I'm starting to draft this email. 78 degrees. In February. In Pittsburgh. I, for one, love it. But I'm also not an NHL executive who planned an outdoor hockey game in Pittsburgh this weekend – or a ski resort owner. Yikes.

Here are a few of the more interesting things we saw at CivicScience this week:

**Consumer confidence rebounded slightly over the past two weeks, though still short of its high point in mid-January.** I think we may have to get used to [this kind of volatility](#), so long as the political environment is in its current state. Consumers are paying attention to the news at heightened levels and reacting – or over-reacting – to almost everything. It's worth calling out that confidence in the job market has continued to slide, even while other metrics rose.

**As for *personal* consumer confidence, you should praise your children and grandchildren as much as you can.** There's been a lot of debate in psychology circles lately over whether excessive praise – versus tough love – is best for child development. [Our research is definitive](#) in the pro-praise direction. Adults who reported high levels of praise from their own parents are more likely to be gainfully employed, healthy, and happy as adults. I don't know why anyone would find this shocking. Don't be an asshole to your kids. Plenty of other people will be.

**Starbucks favorability numbers have taken a big hit over the past couple months.** See for yourself in the handy chart below. It's hard not to attribute this to the company's much-publicized response to the Trump immigration ban. The fact that nearly all of the favorability declines came from Republicans makes it fairly clear. A possible saving grace for Starbucks is that Republicans are much less likely to eat/drink there anyway, so perhaps this won't show up in their sales numbers. But I wouldn't count on it.



**On their big weekends, NASCAR and the Oscars are both at a crossroads.** Heading into Sunday's Daytona 500, the [Wall St. Journal](#) painted a horrific picture of the state of NASCAR. We started to see these cracks – [owed largely to demography](#) – as far back as 2014. The Oscars telecast is facing an equally daunting downward trend. [80% of U.S.](#) adults have no interest in watching this year, compared to 52% who said the same just three years ago. My friend and writing hero, [Bob Lefsetz](#), makes a convincing case that the movie industry has lost touch with its audience. Ironically, the NASCAR fan and the Oscars fan are about as different as two populations can be. Declining enthusiasm might be the only thing they have in common.

Have a great weekend, no matter what you watch.

Enjoy Life,

**JD**

# Trump Begins Impacting Brand Market Share (3/11/2017)

It takes a lot of effort every week to *not* make this entire email about Donald Trump and the news surrounding his administration. It's all most people seem to care about. My hope has been to occasionally distract you with interesting but less serious insights into things like college GPAs, french fries, and fizzy water.

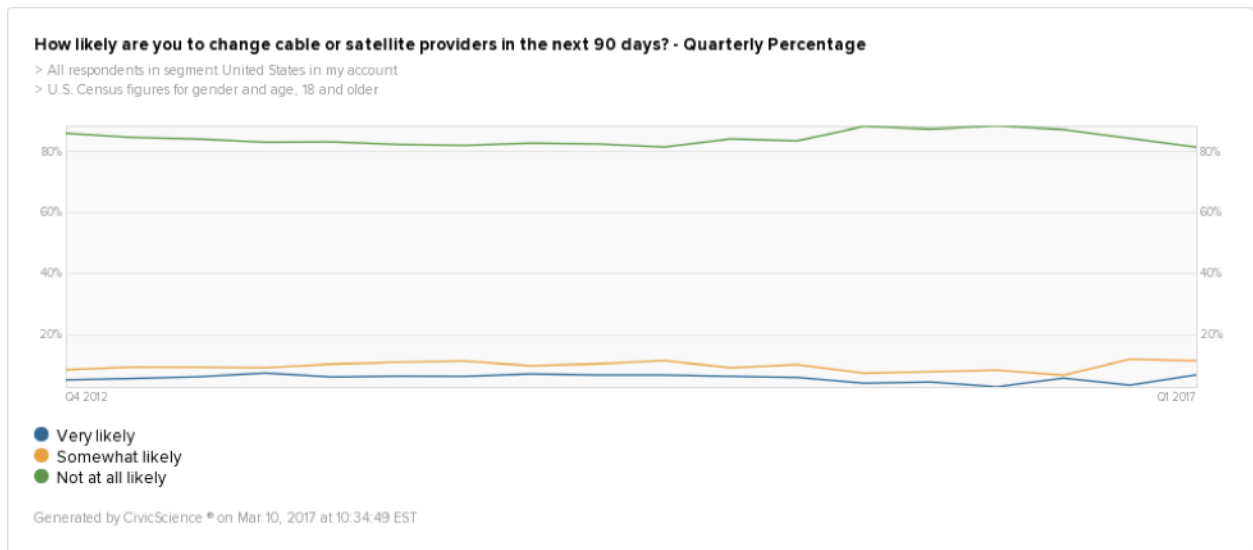
But this week I'm selling out. I've been deep in research all week about some of the more latent – but serious – ways our current socio-political-economic climate are (or will) impact consumer markets. I thought you might want to know what we're seeing...

**First, consumer confidence remained steady over the past two weeks, climbing ever-so-slightly.** The growth was buoyed by consumers' positive attitude toward their personal finances but dragged back down by their apprehension about major purchases. Still, [this the first reading](#) since November that wasn't terribly dramatic. Maybe things will begin to settle down.

**We're entering a new era of "consumer switching," unprecedented, at least, in the five years we've been studying this stuff.** We run a multitude of tracking questions in our system, asking "*How likely are you to switch/change [X] in the next 90 days?*" The 'X' could be anything from banks, to insurers, to mobile carriers, or any other ubiquitous industry where customer market share is typically a zero-sum game. Generally, the rate of "very" and "somewhat" likely switchers is low and consistent over time. Our goal, typically, is simply to inform clients about their at-risk customers and identify achievable customers among their adjacent competitors.

**But what we have seen in the past 120-180 days is uncharted territory.** The volatility we've witnessed in macro-economic sentiment, compounded by the socio-political turmoil of the past year seems to be turning things on its head.

**Take cable and satellite providers, for example.** The percentage of U.S. adults who said they were very or somewhat likely to switch providers was roughly 16% prior to the election in November. The number jumped to 21% in the last 30 days. Who are these new switchers? They're more likely to be Democrats, minorities, younger, and lower income.



**The retail banking industry tells a similar yet completely different story.** Overall, a consumer's likelihood to switch banks in a 90-day period has remained relatively consistent, with just a 2% increase since the election. However, prior to November, the likely bank switcher was much more likely to be a Democrat. But, over the past 3 months, they're now 47% LESS likely to be a Democrat. The likelihood of a Republican switching banks is now 27% higher.

**These kinds of shifts are happening across the marketplace.** It all seems to be pointing to a period of customer migration (for how long we don't know), where the composition of those movers varies by category based on their socio-political and economic cohort. Some consumers are withdrawing from markets, others are diving in.

It should all make for an interesting 2017.

I promise to get back to more mundane and frivolous content next week.

Have an awesome weekend.

**JD**



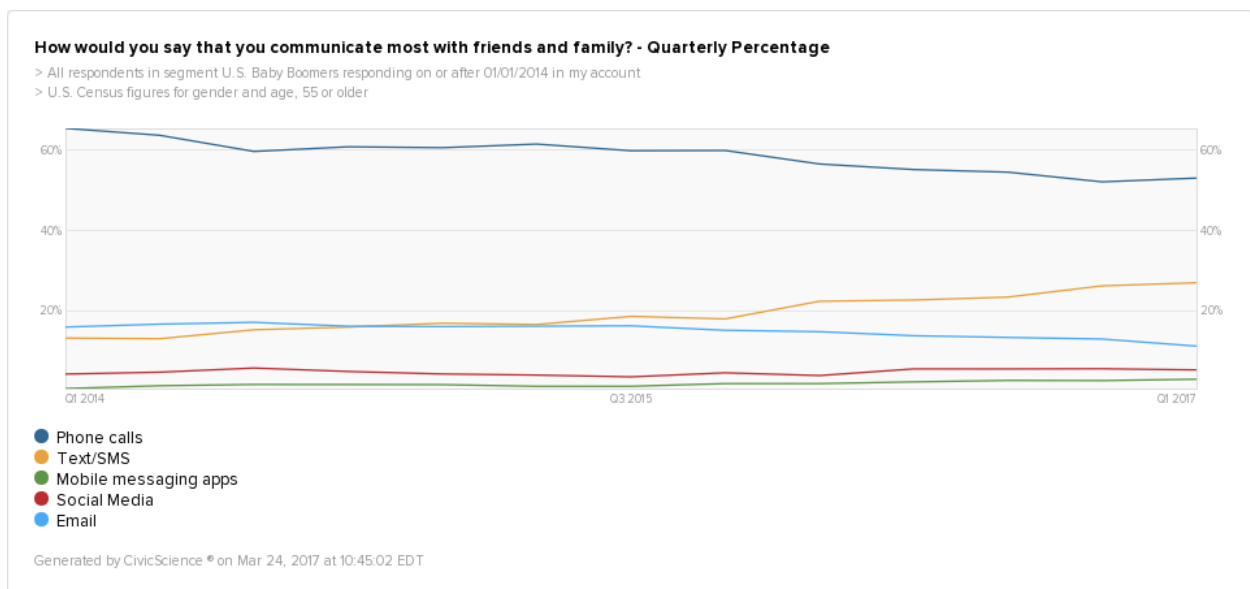
## The Old Consumer Indices are...Old (4/1/2017)

I hope when you saw the Conference Board “surprise” Wall St. on Tuesday with [its report](#) that consumer confidence hit a 16-year high, you simply rolled your eyes and said, “Yeah, I knew that on Saturday.” Here’s the crazy thing about these old-school economic sentiment reports: The Conference Board cut off its survey on March 16th – 12 days before the report was released. In today’s volatile socio-political-economic era, that’s just silly.

Anyway, I’ll get off my soapbox. Here is a hodgepodge of interesting things we’re seeing this week:

(Sheepishly climbs back on soapbox) **I CAN tell you that consumer sentiment already fell between my email last Saturday and the Conference Board announcement on Tuesday.** Blame the health care/ACA debacle. I’ll paint a fuller picture next week.

**Older Americans are adopting text/SMS as their primary means of communication at a tremendous rate.** Phone calling is in [steep decline](#) and email is slipping. We don’t normally see time graphs with this kind of slope in them over such a short period of time.



**All the controversy over NBA teams resting their star players for the playoffs is much-to-do-about-nothing among the league’s biggest fans.** But, as our friend and

loyal reader, (gratuitous name-dropping alert!) Mark Cuban, pointed out, [the real story in these data](#) is the fact that 70% of Americans still don't follow the NBA with any regularity. If teams keep stars on the bench, it may help their playoff chances but they're missing an opportunity to grow the sport.

**People go to the movies because they love the experience of going to the movies.** Movie attendance has been in a well-documented decline, due largely to less-frequent movie-goers who have been deterred by cost. Some industry experts predict that the ability for consumers to see movies at home the day they open in theaters would be a kill-shot for the cinema companies. Data [we published in Variety](#) this week say otherwise. People value movie-going for the ritual and the overall experience. You can simulate only so much of that on your couch.

**And finally, yes, people do want to buy McDonald's signature sauces at the grocery store.** News came down this week that McDonald's will soon begin selling their famous sauces in Canadian grocery stores later this spring. It looks like over 1/3 of U.S. adults would be at least somewhat interested in trying them. That's a lot of people.



I'm working on a study about couples who are divided on Donald Trump. It's fascinating. I'll tell you all about it next week.

For now, be well.

**JD**



## 9 out of 10 Couples Agree on Trump (4/8/2017)

It was a dizzying week to say the least. It seemed like most of the research we did was a fire drill, trying to study things with only a few hours' notice. Not my favorite kind of work but fun nonetheless.

Here a few of the timely things we saw this week:

**As I alluded to last Saturday, economic sentiment slid rapidly after the failed ACA repeal efforts.** The Conference Board's report of a 17-year high in consumer confidence last week was stale before the ink was dry. [Our latest reading](#) showed the first decline in economic sentiment since early February, almost matching the low point for the year. Most of the decline came in the three days following the ACA debacle – all before the Conference Board's announcement.

**If Republicans dragged down consumer confidence numbers, they were reinvigorated by the recent missile strikes in Syria.** In the first 12 hours after the strikes, public [support for Trump's decision](#) was high – with over 60% of Americans reacting favorably. Even 33% of Democrats supported the action, which is remarkable in today's divisive political environment. Incidentally, men and women were fairly divided on the issue.

**Men and women are NOT divided – at least if they're in a relationship – when it comes to Trump overall.** I spent a few weeks working on a [study for the Huffington Post](#) about couples who disagree on Trump, and it was the most (work-related) fun I've had in awhile. Nine out of ten couples agree on Trump (my wife and I included), which is noteworthy given that we seldom agree on anything else. What shocked me the most? Somewhere out there, 2% of people are in a heterosexual relationship where the woman supports Trump and the man opposes him. Fascinating.

**Bad news – er – bad advertising travels fast.** Unless you were living under a recycling bin this week, you no doubt heard about the controversial Pepsi ad with Kendall Jenner. In little more than a few hours, [we saw Pepsi's advertising awareness numbers jump 17%](#) and their negatives almost triple – compared to the past 6 months. Even though Pepsi quickly pulled the ad and apologized, it wasn't fast enough. I'm sure things will bounce back over time, but it's still a cautionary tale. Negative reaction spreads like wildfire today. Be careful – and nimble.

I'm taking a week off for a Spring Break trip with my family. If you go into information withdrawal, we published a fun-to-read "eBook" containing [102 of the most interesting stats](#) we've discovered lately. Did you know that people who drink wine twice a week or more are much more likely to be happy in their job? Did you know that I love my job?

Back again in a couple weeks.

**JD**



## Boomers Flock to YouTube (4/22/2017)

If you call visiting your mom and your mother-in-law, who live two blocks from one another but aren't on speaking terms and spend most of their time complaining about the other – a “vacation” – then I had a nice vacation. Thanks for asking.

I came back to Pittsburgh to find all sorts of interesting new research on my desk. Here's only a sample of what we're seeing right now.

**Consumer Confidence rebounded slightly over the past two weeks – merely continuing the unprecedented ups-and-downs of the past few months.** What's interesting about [this reading](#), however, is the paradoxical nature of it. People are showing decreased confidence in the broader U.S. economy while, at the same time, expressing an increased willingness to spend money, particularly on major purchases. There will be a reckoning of those conflicting views at some point, we just don't know when or how.

**There may not be many (or any?) Millennials on this distribution list but, if there were, they would have been much more interested in that last paragraph than they were two years ago.** Huh? In short, [our tracking data](#) tell us that the percentage of Millennials who say they are following financial and economic news has more than doubled over the past 8 quarters. Funny how a ton of student debt and a mortgage can turn your attention away from YouTube.

**In the *Every-Action-Has-An-Equal-And-Opposite-Reaction* Department, the number of Baby Boomers who watch daily videos on YouTube has grown significantly during the same period.** Younger Boomers, [namely those aged 55-64](#), who watch YouTube on a daily basis have nearly doubled since 2015, while the percentage of Millennials who watch daily has grown by just 5%. I don't need to explain the implications of that. Use your imagination.

Take a big swig of your coffee so you can focus on these last two points, because they're really important....

**The auto industry – new, used, and rental – is in for one hell of a ride in the coming months.** If you follow business news, you're probably aware of the huge glut of used cars hitting the consumer market and the implications that has on pricing (and rental

car company stocks). But our data tell us that these depressed used car prices are no secret to consumers either. The percentage of active car shoppers who say they plan to buy NEW has dropped from 37% in Q1 of 2016 to just 27% in Q1 of 2017. Yikes.

**Millennials (yeah, I know, I'm tired of talking about them too) are becoming less and less loyal to their favorite brands.** Unlike Baby Boomers, where 90% claim to be at least “somewhat loyal” to brands, the rate among Millennials dropped from 84% to just 78% since 2014. Realize there is a big difference between being brand-conscious and brand-loyal. Millennials are most certainly still brand-conscious. They're just increasingly attracted to new things and quick to abandon brands they once loved. So, don't rest on your laurels. And quit thinking that some brand loyalty study you did six months ago matters one iota today.

Okay, that's more than I like to make you read on a typical Saturday. My bad. I was on vacation. Or whatever you want to call it.

Hoping you're well,

**JD**

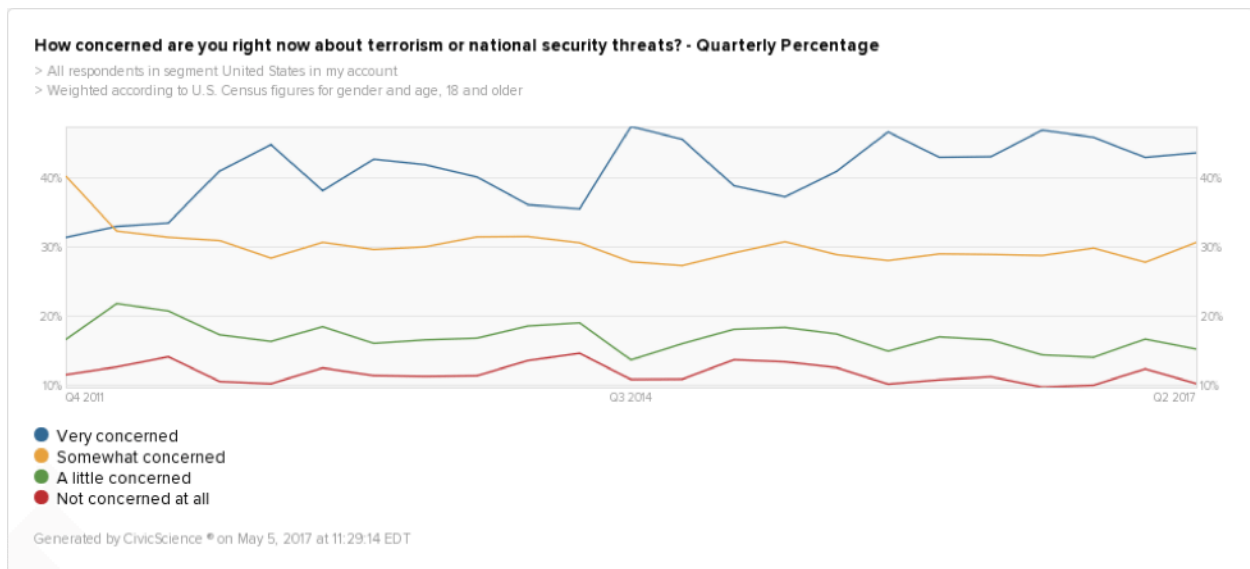
## The Seasonality of Terrorism (5/6/2017)

I'd characterize this week's submission as "schizophrenic," as our research was all over the place. I had a chance to do an [on-air segment](#) with our new friends at Cheddar, which you might appreciate. Rest assured, it's stuff I shared with all of you first – you're special



Here are some of the wildly diverse things we saw this week...

**It's domestic terrorism season.** Did that wake you up? In the midst of broader research into "the Stay-at-Home Economy," I was looking for factors in our database that correlated with declines in movie attendance, eating out, and other out-of-home behaviors. No surprise, the more someone is concerned about terrorism or national security threats, the less they go out. Then, something caught my eye when looking at this time-graph:



Since we began tracking this question in 2011, **“Very concerned”** has followed a loose seasonal pattern, traced fairly clearly to major events (**Aurora, Charleston, Boston**). Why seasonal? Because since 2011, 67% of the terrorist/mass murder incidents on U.S. soil have occurred between April and September. Not one has happened in March. Our next goal is to figure out if this pattern has any effect on markets and industries. I'm also evaluating the theory that the Stay-at-Home Economy can trace its roots to September of 2001 (stay tuned).

**Consumer confidence dipped slightly over the past two weeks.** As the Trump era reached the 100-day mark, we saw our fourth consecutive oscillating [reading](#) (ie. up/down/up/down). Respondents' satisfaction with their personal finances continued to improve, while confidence in the job market continued its 6-week slide. It's hard to make sense of it all.

**Raising prices won't hurt Chipotle.** Though the company still has its share of challenges, its recently-announced 5% price-hike shouldn't add to the woes. Chipotle's loyal consumers aren't [particularly price-conscious](#). Keeping and winning Chipotle customers is – and always has been – about food quality.

**Hulu and YouTube could be heading for a clash.** As you probably saw, Hulu announced a new live TV streaming package this week. According to [our data](#), 25% of U.S. adults are intrigued by Hulu's offering – which is virtually identical to the results we saw when asking about YouTube's new live package a few weeks ago. They could be vying for exactly the same people.

**Most people don't wish for fame.** It's a running joke in our office that I sometimes use our polling platform to settle arguments with my wife. This week I used it to settle one with my [daughter](#): We recently turned down offers that could have put her on a path toward fame and debated whether that was an unconventional choice. It turns out [a clear majority of Americans](#) wouldn't want fame for their young child. I found the data uplifting – mostly because it's the first time I ever won an argument with a 13-year-old.

Hoping you're well.

**JD**

PS – I've been asked to remind you all that I broke free from our company Twitter handle and created one of my own (@johntdickIII). It sucks going from thousands of followers to "tens" but at least now I can yell about Pittsburgh sports in my own voice.





## Predicting TV Show Success (5/27/2017)

I'm hoping most of you are too busy barbecuing, hiking, playing golf, nursing a hangover, or just sleeping in to read this. You deserve a great holiday weekend. I'm on a plane to Minneapolis with my family and, it turns out, I enjoy writing more than reading – so here you go.

My research over the past week was almost singularly focused on one thing – the TV 'Upfronts' and the newly-announced shows for the fall season. I'm fascinated by the trends in media consumption and how they're changing the landscape for everyone from networks to cable/satellite providers, web publishers, advertisers, and agencies.

Here's what we are seeing in that research...

**It's really hard to predict which – if any – shows will be a huge hit.** In 2015, we studied the top 13 shows with the highest amount of media attention and buzz after the Upfronts that year. Of those, only 3 are still on the air. None of the top-5 (based on early interest, buzz, and viewer intent) survived more than one season. That included shows like the *Muppets* or *Of Kings and Prophets*, which seemed at the time like slam dunks. We studied [14 shows for the 2017 fall season](#) – and there's no reason to believe our Gen Pop 'intent' metrics will prove to be any more predictive this time around. That wasn't the point of our research.

**The definition of a successful TV show is changing before our very eyes.** Fickle consumers, faced with near-infinite entertainment choices, and ever-fragmented media platforms don't want 'mainstream'. Winning shows appeal to narrow audience cohorts, people defined more by their psychographic similarities (values, attitudes, lifestyle) than obtuse, old-school demographics. We want to talk about the shows we watch and – more and more – we only want to talk to people like us. If you look at the surviving shows from our 2015 research (*Supergirl*, *Crazy Ex-Girlfriend*, and *Blindspot*), they have modest but highly-loyal and clearly-defined viewer groups. We do see commonalities among those audiences, which *could* help us predict a show's success in the future.

**It's all about the women.** While networks and advertisers drone on about the 'coveted 25-54 male demo', the most crucial, influential television success driver is indisputably female – and a very particular female at that. As we have seen consistently over the past two years, there is a clearly-defined TV "Market Maven", namely, news-obsessed, social-

media-addicted woman, who tries new things before her friends, and broadcasts her opinions for all to hear – she has tremendous influence over her peer group and her household.

**Think about the people in your social networks who were first talking about *This is Us* last fall.** I'll bet they weren't men, were they? I'd never even heard of the show. Now it's the hottest thing on network TV. Incidentally, the likely viewers from our 3 surviving 2015 shows all heavily-over-indexed as Market Mavens. If I was a network exec, I'd be doing everything in my power to connect with, monitor, and persuade this group. And I'd start by investing aggressively in social media.

**While an individual show's audience may be smaller, the opportunities for advertisers might be bigger.** For each of the likely audiences we studied this year, we saw clear affinities for certain brands and brand categories (See: *The Orville* and Kia). Very little of this had anything to do with demography. Brands that align with the right show and the right audience can build a loyalty foothold. It's all about precision.

Check out [the full report I put together](#), if you want to see our assessment of the individual shows. But I think these observations are relevant to much more than a dozen-plus TV shows, most of which won't be on the air a year from now anyway. These are big societal and commercial shifts we're seeing.

Sorry if you're partial to my more 'cross-topic' missives. I'll get back to that next week, I promise.

Have an awesome holiday weekend.

Hoping you're well,

**JD**



## Don't Go Home Again (6/3/2017)

Greetings from Pittsburgh this fine Saturday morning. Contrary to recent news, we are still more of a tech hub than a burgeoning steel and coal town. But check back next week.

Here are some of the real, credible, non-absurd things we are seeing right now...

**Economic sentiment came in completely flat over the past two weeks.** It's the first [steady reading](#) we've seen in a year, perhaps because people are obsessing a little less about the political environment as summer approaches (thank goodness). The only notable trend we saw is a fairly significant decline in confidence toward the job market. We need to keep an eye on that. Also, if you geek out about this stuff, check out [the Conference Board's May consumer confidence report](#). As we told you, May's decline was evident three weeks ago. I'm afraid these old indices can no longer keep up.

**Digital currencies and 'Blockchain' are here to stay.** While cryptocurrencies like Bitcoin range from a surreal myth to a punchline for the uninformed, the appeal of these alternatives is broad and growing. Among people who follow the financial markets the closest, I was a little [surprised to see](#) the extent to which "independence from governments" (at 39% of respondents) was the most popular attribute of these alternative currencies. If our socio-political-economic environment doesn't calm down, this appeal – at least in some circles – will only increase, potentially shaking up markets in unprecedented ways.

**People prefer cold weather cruise destinations.** This little insight won't change your life but I found it surprising nonetheless. On the heels of announcements from the major cruise carriers that they were adding Cuba as a new destination, [we set out to gauge](#) how popular it might be. While, yes, a fair number of people are intrigued by Castro's old 'hood, it's a far cry in popularity from places like Iceland or Norway among the Gen Pop and frequent cruise-takers alike. Personally, I'm on outlier on this one. I'll take Cuba. Who's coming with me?

**If you've moved far away from your childhood hometown, don't go back.** This was [my favorite research of the week](#), even though (or maybe because?) it had no commercial motive whatsoever. Out of curiosity, I set out to study the differences among adults who have never moved away from their hometown, those who moved far away and never returned, and those who moved far away and came back. The gist? People who live

between 11 and 60 miles of their hometown are the happiest. People who live within 10 miles of where they grew up are the least likely to be unhappy. But, people who moved more than 60 miles from their hometown, only to return, are WAY more likely to be unhappy. Check out the article if you get a chance. It's short, I promise. I'd love to hear your theories.

**One random stat of the week:** 52.6% of people choose Rock most often when playing Rock, Paper, Scissors. That means you should lean toward Paper – and never pick Scissors. You can thank me later.

Hoping you're well,

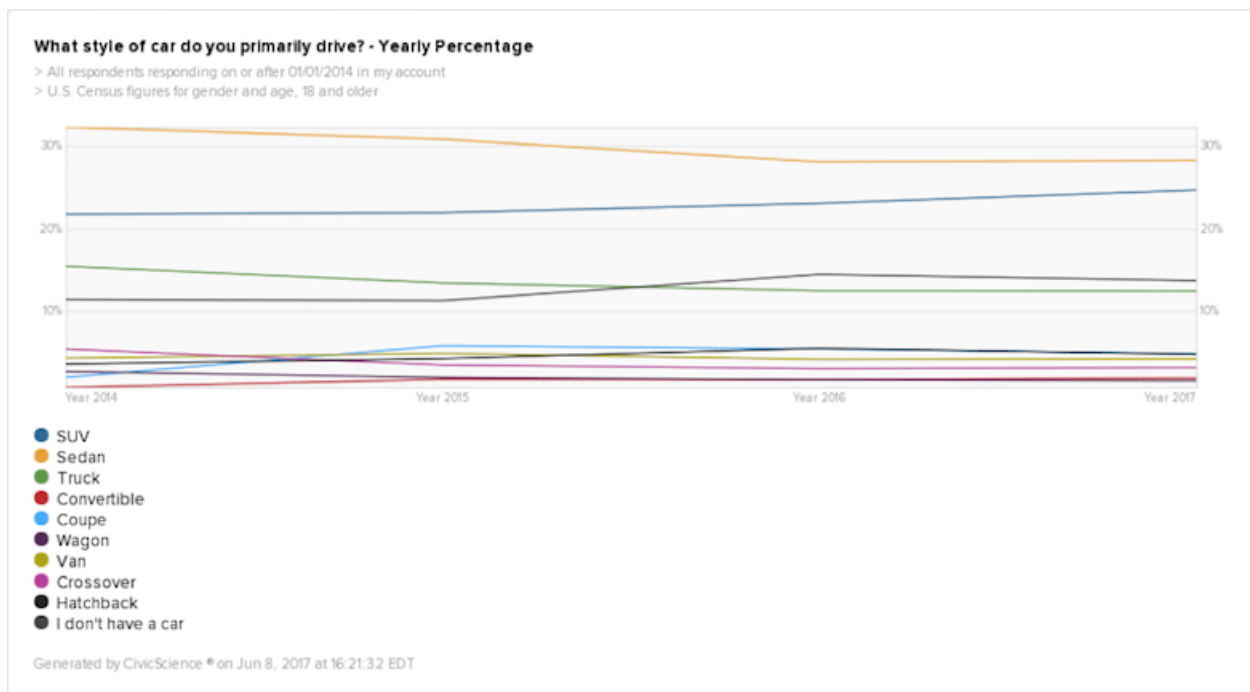
**JD**

# I Admit to Smoking the Occasional Parliament (6/10/2017)

I want to take a moment to thank you all for your insightful comments and feedback every week. The diverse perspectives and ideas you have really make me think about new directions to take our research. It would make for an awesome “Mailbag” someday – but I value your discretion too much to do that.

Here are a few of the more comment-worthy things we’re seeing this week:

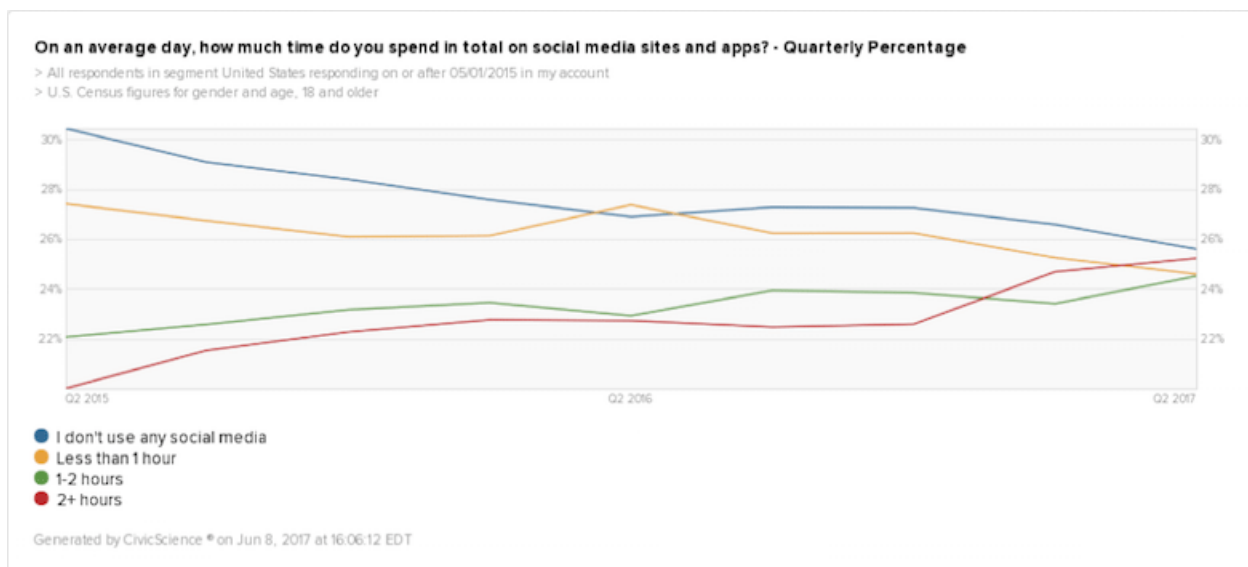
**As economic sentiment has climbed since the election, expect SUV sales to rise, too.** We have two long-term tracking questions about cars in our system. In short, we ask people what type of car they currently drive and what kind they plan to buy next. Sedans are the most common ‘current’ vehicles at 28% of U.S. adults, followed by SUVs at 25% (not including crossovers) – but that gap has been cut in half since Q1 2014. In just the past six months, the number of people who plan to buy an SUV with their next purchase increased by 3%, while sedans declined by almost 2%. If those numbers play out, the rate of SUV ownership could equal sedan ownership by year end. (Also interesting: People who drive trucks today will buy another truck later. Those numbers barely moved an inch in over four years).



**While we're prognosticating, expect half of U.S. adults to be Netflix users by the fall.** The percentage of consumers who stream content on Netflix has increased by 5% over the past 12 months (from 44% to 49%). At that rate, usage should surpass 50% by September. 'Hold on,' you say! 'Only [51 million U.S. households have Netflix!](#)' Correct. But remember what [we told you](#) a couple months ago. 72% of Netflix households have more than one user on their account. 11% of accounts have four users or more. We're talking about eyeballs here, not accounts. Crossing the 50% threshold is a big deal. Only Facebook is more ubiquitous as a platform.

Speaking of Facebook...

**Social media is consuming (almost) all of us.** Check out this crazy chart below – we don't often find a timeline in our data like this. Over the past two years, we've seen huge shifts in social media usage, with the rate of non-users and light users plummeting, while heavy users climb. If this trajectory continues, right around the same time Netflix hits 50% of the U.S. population, the number of people who use social media 2+ hours per day will surpass the number of people who don't use social media at all. Like it or not.



Last but not least...

**In which I confess to the occasional alcohol-induced Parliament.** OK, that's not exactly the lede but [it helps with the story](#). The cigarette industry reported record profits earlier this year on the backs (or lungs) of the 13% of Americans who still smoke every day, in spite of \$6.42-per-pack prices. What we found in our data was that these consumers

affect more than just cigarette sales, as they are 2.5X more likely than average to buy food and beverages from convenient stores on a regular basis. We also learned that Millennials are smoking just as much as everyone else. Smoking isn't going extinct. And that's a good thing for the likes of Wawa, Mountain Dew, and Slim Jim.

**Random Stat(s) of the Week:**

- 23% of people can't whistle
- 16% of people can only wink with one eye
- 31% of people hold their breath to get rid of the hiccups (the #1 remedy)

Hoping you're well.

**JD**

## We Revolutionize LGBTQ Research (6/24/2017)

Whew. What a week of business news – going back to Amazon + Whole Foods which broke too late last Friday for me to cover in time for Saturday. It was definitely a great test of the speed of our platform, just trying to keep up. This email practically wrote itself.

Here are a few of the many things we are seeing this week (Warning: Slightly longer read than usual):

**Amazon's purchase of Whole Foods makes a lot of sense from a customer acquisition perspective.** While market analysts and pundits are touting the virtues of Amazon + Whole Foods from a distribution and price leverage standpoint, don't lose sight of the alignment between the two companies' consumers. Beyond the obvious demographic similarities, namely affluence and education, Whole Foods will bring a younger, more urban customer under the Amazon tent. Given that current Whole Foods customers are over 3X more likely to already buy some groceries on Amazon, this marriage [could spell trouble for Whole Foods' most adjacent competitors](#) – if not the whole grocery retail industry.

**Don't ignore Amazon's move into the apparel subscription box business either.** It feels like we're speeding toward a day when this entire write-up is about Amazon. For now, we should [keep an eye on the growth of Prime Wardrobe](#), the Bezos crew's answer to services like StitchFix and Trunk Club. Never heard of those companies? All the more reason to expect Amazon to wipe them out, especially considering the reach and leverage AMZN has with brands. If you don't read the article, one interesting observation was the 15-20% rate we see of potential buyers. That's becoming a magic number for "early adopter" products. We'll see if Prime Wardrobe can break through where smart watches, VR, home assistants, and other tech novelties haven't yet.

**Pinterest is a surprising destination for business owners.** I'm embarking on a lengthier study of 63,000 business owners in our respondent database – their lifestyle, media habits etc. Though several weeks away from sharing that, I came across [a fascinating discovery](#): Namely, a significant over-indexing of Pinterest users among business owners and entrepreneurs – like, equal to or even higher than Twitter. Who knew? Well, now you do.



**Not unlike Amazon + Whole Foods, the Coach + Kate Spade combination looks like a result of smart consumer segmentation.** Distracted by so much ‘breaking news,’ it took us a month to [finally breakdown Coach’s planned acquisition of Kate Spade](#). On paper, it has all the makings of a winning combination – Spade brings a decidedly younger, more social-media-savvy consumer to the older, less-social Coach brand. It’s hard to grow a brand without those market mavens today, especially in fashion.

**The immediate returns on Travis Kalanick’s not-so-voluntary resignation from Uber are relatively positive among riders.** We [reported on this one](#) the day the news broke. Although most U.S. adults were unaffected by the announcement of Kalanick’s departure, the topline results suggested that people are now *more pessimistic* about the company. However, when we cut the numbers, we saw that current Uber users were 2X more likely than non-riders to be *more optimistic*. In any event, you’d have to think the company has nowhere to go but up from a PR perspective. Right?

Finally...

**As expected, our LGBTQ tracking research generated a lot of attention, mischaracterization, and invective.** People on the pro-LGBTQ side of the political aisle used [our Wednesday announcement](#) to [subtly jab](#) at the Administration. Reactions from the conservative side ranged from baseless attacks on our methodology to suggestions that, by legitimizing this research, we might be encouraging more people to adopt an LGBTQ lifestyle. Welcome to 2017.

For the record: Our mission at CivicScience is, very simply, to produce honest, objective, and accurate data about the U.S. population (and hopefully beyond someday), for business leaders and policymakers to apply as they see fit. It is not our company’s job or goal to advance our own social, political, or commercial agenda.

That said, personally speaking, I was a little prouder to go to work this week.

Hoping you’re well.

**JD**

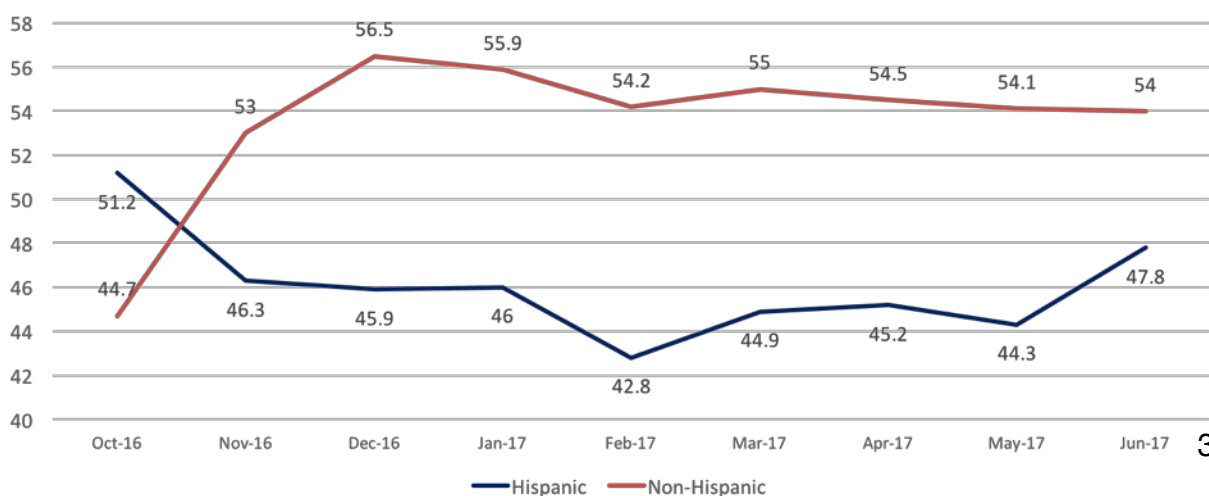
## Hispanics Make a Comeback (7/1/2017)

Well, it was certainly a less chaotic week on the business news front – and we aren't going to touch the President's Twitter follies with a ten-foot poll (get it?). But we never stop doing research. So here are a few of the noteworthy things we are seeing this week:

**Economic sentiment toward the labor market and personal financial outlook took a dive over the past two weeks.** Overall consumer confidence fell less than a point, largely because positive attitudes toward the housing market and major purchases kept things afloat. Ironically, on the same day we released our index, [Bloomberg published](#) their Consumer Confidence Index (CCI) for June, touting an “unexpected rise” in confidence due to a “buoyant” job market. Why the stark difference from our numbers? Because the CCI is based on a 4-week rolling average. Our aggregate numbers for June were very similar to the CCI; however, all of the gains came in the first two weeks of the month, with a steady (and continuing) decline in the past 10 days. I'll say it again: These traditional survey-based economic indices cannot keep up with today's hyper-sensitive consumer.

**But consumer confidence among Hispanics is showing a remarkable rebound.** It should come as no shock that economic sentiment among Hispanic Americans plummeted after the November election, bottoming out a month into the Trump Administration. This trend manifested itself in the form of depressed Hispanic consumer spending in the first quarter, particularly in areas like retail and restaurant. But, as you can see in the chart below, the numbers are improving at a remarkable pace. Expect this to be a harbinger of increased spending in the summer months. *(Hat tip to our friends at Univision for helping us crunch these numbers).*

### Overall Economic Sentiment Index



**The youngest U.S. consumers are reading the newspaper more.** How's that for a surprise? We've been doing deep-dive research into so-called Gen Z (13-17y/o) consumers and came across [this uplifting discovery](#). The number of Gen Z consumers who say they habitually read a traditional newspaper in print or online every day has increased by 38% since 2015, the largest gains of any age cohort we study. As someone who has a soft-spot in his heart for newspaper journalism, this put a smile on my face.

**Even if they bolster newspapers, Gen Z is going to shake up the banking industry.** Over 25% of Gen Z consumers now say that [they place greater trust](#) in digital solutions like Apple Pay or PayPal than in traditional banks. That's a full 25% higher than even the next youngest Millennial cohort. With the torrid pace of innovation in areas like payments and cryptocurrency, expect those percentages among Gen Z consumers to accelerate before they slow down.

**There are two kinds of people in this world: People who will let their auto insurers spy on them to save money and those who won't.** We've been [studying the advent](#) of 'safe-driver' devices, embedded in cars by insurance companies to evaluate driver safety, in return for lower insurance rates. The majority of Americans (53%) are creeped out enough by it to say no, regardless of the potential savings. 38% are willing to at least consider it, which is still a large number. Count me in the majority on this one.

Have a great, safe, and fireworks-filled holiday weekend.

**JD**



## Parents Are Happier, Twitter Is Not the Real World (7/8/2017)

After boasting last week that we “never stop doing research,” I have to amend my statement slightly. We never stop collecting data, for sure. But in a week with a major holiday in the middle and a large chunk of our team on vacation, our cupboard of new discoveries is bare.

So, rather than breaking my streak of weekly submissions, I thought I would dust off a few of our greatest hits from the past four years– hoping that at least some of it is new to you:

**The undercurrents that foretold the coming of Trump were first evident in our data way back in November of 2013.** It was then, in the nascent days of our Economic Sentiment Index, that we saw a major rift in consumer confidence among rural Americans. As our friends at [the WSJ highlighted](#), broad economic sentiment spiked dramatically at the time, while older, white, rural residents fell further behind. As the gap widened over the next three years, nobody was listening – because [this rural cohort wasn’t on social media](#) yelling about it – so many in Washington and the media thought everything was just fine. Oops.

**Hands down, people who don’t have kids live better lives – except for one major thing.** This was the first research I ever published (not the last) that brought me a deluge of hate mail. On Good Morning America in 2014, [we shared findings](#) from an [extensive study](#) into the differing lifestyles of over 656,000 U.S. parents and 393,000 adult non-parents. We found that non-parents had significantly higher quality of life when it came to health, sleep, exercise, travel, job satisfaction, stress and anxiety, and overall leisure and entertainment. What was the punch line? When asked “*How happy are you?*,” the parents were far more likely than the non-parents to report higher levels of happiness. A quick check of these data today yields the same results.

**A person’s height can tell you an astonishing number of things about them.** In some of my [all-time favorite research](#), we explored hundreds of correlations in our database that were related to a respondent’s relative height. When normalized for gender, taller people are more likely to use Twitter, watch ABC, exercise regularly, and be heavily influenced by their friends on social media. Shorter people are more likely to use Pinterest,

watch NBC, love country music, vote Democrat, and use T-Mobile as their wireless carrier. And that was just the tip of the iceberg.

**The composition of Twitter's user base looks nothing like the real world.** It was true when [we first wrote about it](#) three years ago and is still true today, even as [the percentage of Americans who use](#) Twitter climbed a few points. This is particularly relevant in today's political landscape – [don't fall for the narrative](#) that our President is using Twitter to somehow speak directly to 'the people.' It also means that Twitter can be a very attractive forum for certain brands to reach their customers, but a useless forum for others.

**I am completely full of it on social media and you probably are too.** I [wrote this](#) just for my friends on Facebook last November and it's still 100% true (TL;DR) . Apologies for the F-bomb (or two) – I was trying to show everyone how relatable and down-to-earth I am! But it's no joke. Latent peer pressure and Like-seeking on social media are affecting [politics](#), [markets](#), and even [public health](#) in ways we may be years from fully measuring.

**And a few random (hair) stats:**

- 58% of men and only 28% of women wash their hair every day
- 62% of adults would rather have straight hair; 38% would prefer curly
- 32% of adults dye or color their hair
- 59% of adults have cut their own hair at least once
- 24% of adults believe in the "hair of the dog" hangover cure

Hoping you're well.

**JD**

## First Signs of Doom for Snapchat & McDonald's Is Killing It (7/29/2017)

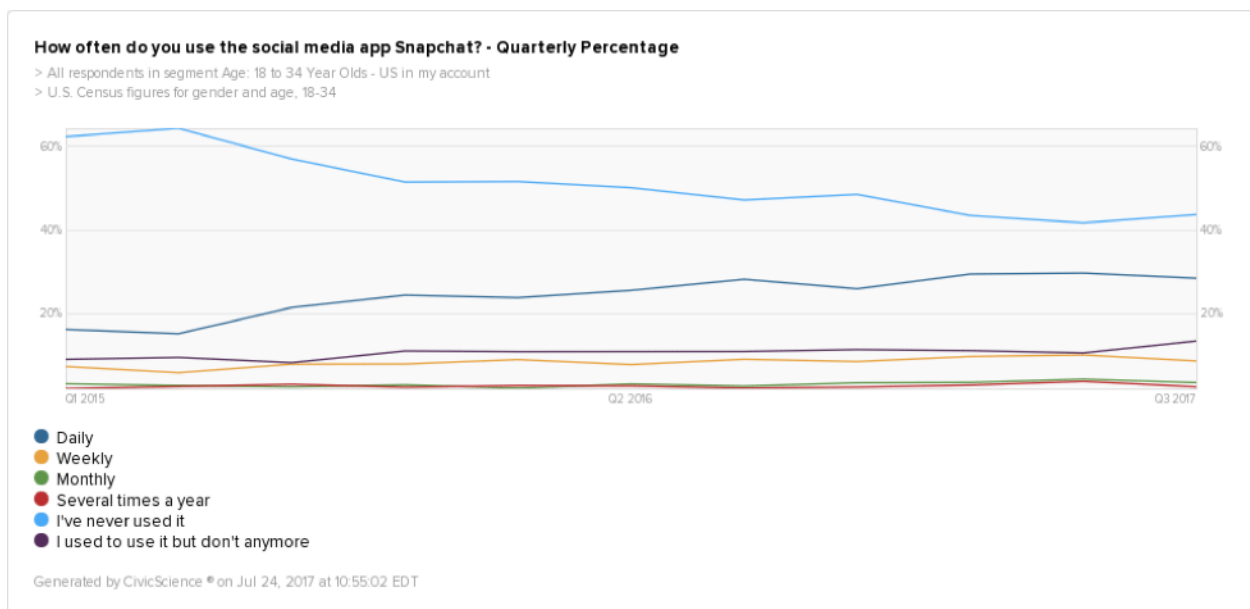
We're holding our annual Client Advisory Board meeting in Pittsburgh next week. Every year, the gathering spawns entirely new directions for our work. In fact, this little email was a brain-child of an attendee at our San Francisco summit last year. Expect to see all sorts of new research topics in the weeks ahead.

Incidentally, I'm super excited to show off Pittsburgh to our out-of-town guests, like our fleet of driverless Ubers, the one-of-a-kind Andy Warhol Museum, and [the best new restaurant scene](#) in America. If you're not hip to the industrial renaissance happening in the City of Champions right now, the [NY Times did a good job](#) of explaining it last week. Get with it.

Aside from how awesome Pittsburgh is, here are a few other things we're seeing right now:

**Economic sentiment showed modest gains over the past two weeks.** At some point, you might start tuning out when I write about this – which is probably when it will make significant moves. For now, every reading feels like a non-event because the top-line number barely budes. But there are [interesting subplots](#) to keep an eye on. Confidence in personal finances has reached its highest point since March. Optimism about the job market climbed after a month of downward movement. Overall, we're still way ahead of where the numbers were a year ago.

**I'm not optimistic about Snapchat, to say the least.** Even before its stock took a beating this week, we had a bad feeling based on some new discoveries in our data. Take a look at the chart below, showing Snapchat usage among Millennials over the past 30 months. It's bad enough that the number of daily users (the dark blue line) leveled off beginning in Q1 of this year. What really concerns me is the recent jump we see in the purple line – people who say they used to use Snapchat but no longer do. No bueno.



**Not to kick Chipotle when they're down...but I think it's an important cautionary tale for my consumer brand execs out there.** After noticing the downward trend in our Chipotle data last week, we spent some time digging and found it even more troubling. Why? Because of *WHO* is fleeing the brand. When we compared [the composition of Chipotle's fans](#) in 2015 to the composition today, it's clear that they are losing a distinct and valuable group of consumers –namely middle to upper-middle class, Millennial and Gen X moms, who live in and around urban centers of the U.S. Not only does this cohort have the fastest-growing spending capacity in the country, they also have huge influence over their friends on social media. Oh, and they're not taking their kids to Chipotle, perhaps tainting an entire next generation of diners.

**McDonalds, on the other hand, is killing it.** We [told you](#) this would happen 2 ½ months ago. I hope you listened. Here's the funny thing. Imagine if, two years ago, someone told you that on June 25th of 2017, McDonald's and Chipotle would both report earnings and one company would be booming while the other was floundering. Which company would you have bet on?

**Shifting gears, making a hard left turn, or [Insert Car Metaphor Here], the era of the do-it-yourself auto repairer is rapidly dying.** Since January of 2014, the percentage of U.S. adults who say they handle auto repairs themselves has fallen from 13% to less than 9%. Local private shops have seen declines as well. The beneficiary? Auto dealerships, who have grown as the repair option of choice from 27% to 33% of Americans in the past two years.

## Random Stats of the Week

- 46% of U.S. adults had an allowance when they were a kid. 48% did not.
- Men were more likely than women to get an allowance, which is [messed up](#).
- Allowance-getters are far more likely to have achieved advanced degrees, but...
- There is no clear correlation between childhood allowance and current income.

Hoping you're well.

**JD**



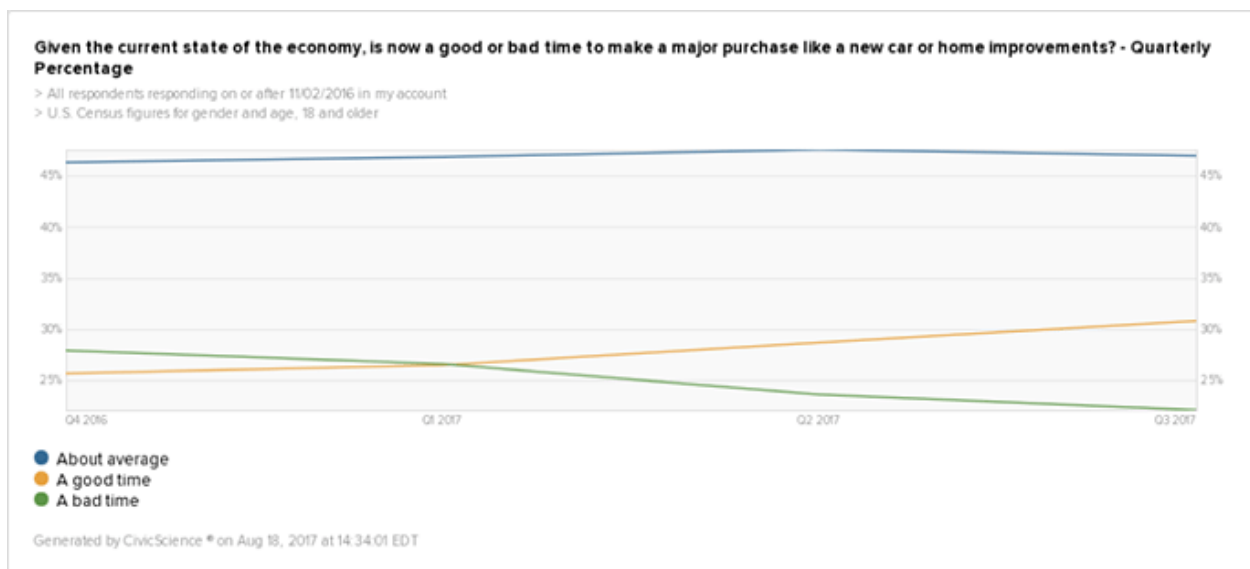
## Why We Don't Publish Political Polling, Also Weed is Popular (8/19/2017)

Several of you have asked me why we don't study politics, Trump, Charlottesville, and the like. Well, we do. A ton, actually. We just don't publish it. Because no matter how objectively and rigorously we gather our data, we will be accused by one side or the other of having a political bias when our numbers don't mesh with their pre-existing narratives. Without fail, we get attacked and then we have to play tricks [like this](#).

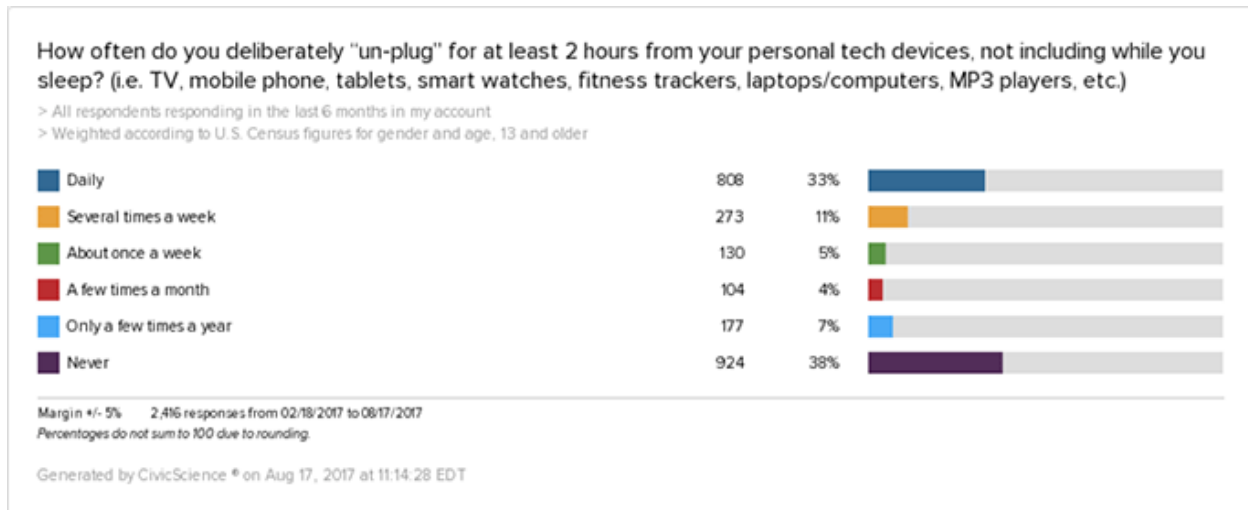
People don't want to be educated about socio-political matters today. They only want to be validated. It's that simple.

So, if nothing else, I promise you a respite from the political maelstrom every Saturday morning. And here are a few things we're seeing right now.

**None of you should have been surprised by Home Depot's huge earnings report this week.** Take a look at the graph below. The gap between those who believe it's a good time to make major purchases, like home improvement projects, and those who believe it's a bad time has been widening by the week since last November. Given what we have [reported here](#), over and over again, about growing consumer confidence and who's driving it, it's easy to guess that they're the people who are most likely to walk into Home Depot to buy new tools, materials, or appliances. Ok, so I *will* tip-toe around politics when it directly impacts the consumer markets.



**Nearly 40% of Americans NEVER unplug from their tech devices.** No surprise, these numbers are skewed heavily by young people. 46% of Millennials and 49% of Gen Zers say they never unplug for even two hours. We make our kids do it or it would never happen. (Note: This was a reader-submitted topic idea – thanks for the inspiration, David B.!)

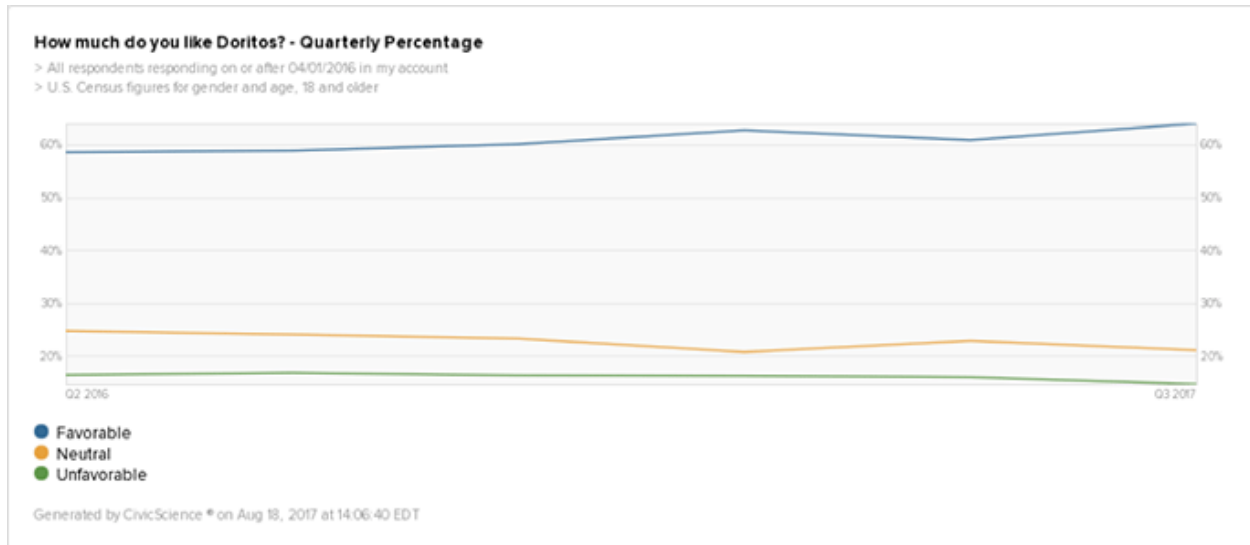


**More people are now likely to plug into Netflix after their latest acquisition.** Admittedly, I had never heard of publishing house, Millarworld, but the cool kids in my office tell me it’s all the rage among comic book and superhero fans. This looks like a brilliant move, especially after Disney’s announced break-up with Netflix. [Our data suggest](#) that action movie fans are relative Netflix laggards and this is exactly the kind of content that could win them over. Reed Hastings and company seem to know what they’re doing over there.

**Meanwhile, smoking weed is still popular.** It’s just that consuming marijuana in other forms is becoming even more popular. Yes, [this actually has serious business and market implications](#) in 2017 America. Although 47% of pot consumers still prefer old-fashioned joints, bowls, and bong, a fast-growing 31% prefer edible forms (See: Consumer Packaged Goods) and another 18% prefer vaporizers (See: High-Tech Gadgets). So... wait...what were we just talking about?

Oh yeah...

**Doritos. People love Doritos.** In fact, the popularity of Doritos has increased by five full percentage points over the past 20 months. There's your random stat of the week. See for yourself:



Hoping you're well.

**JD**

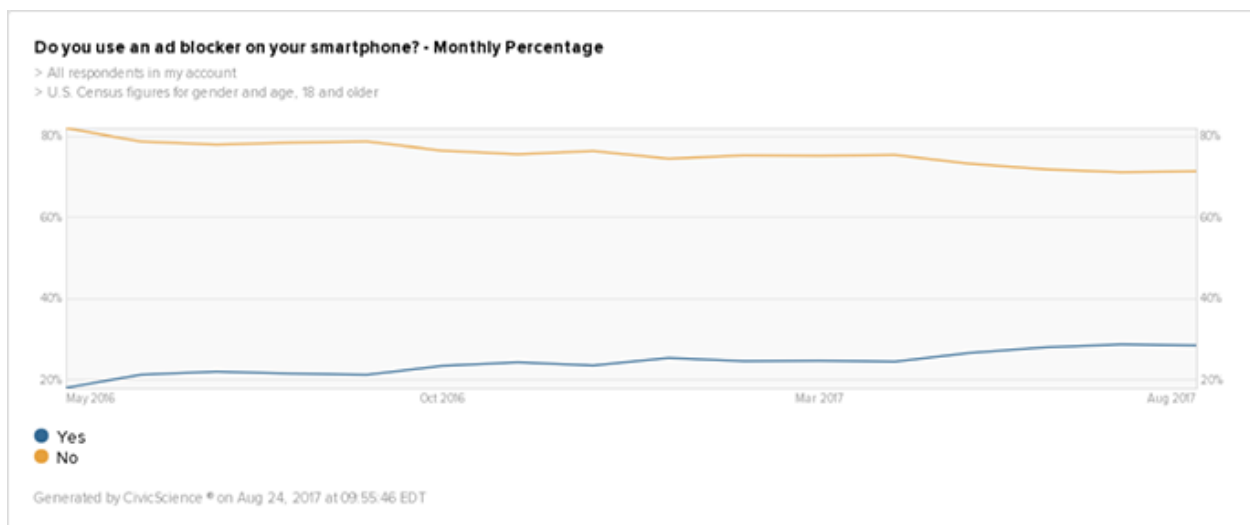
## We Are a Nation of Introverts (8/26/2017)

Just when I thought our nation was irreparably fractured by socio-political division, we found two things in our data that united us all. From nearly every man, woman, and child staring in unison at the sun on Monday, to the near-universal mocking of ESPN's reassignment of a football announcer because of his coincidental name, we saw consensus that has been unmatched as far back as we can remember. It may not be a sign of impending national unity but, hey, it's a start.

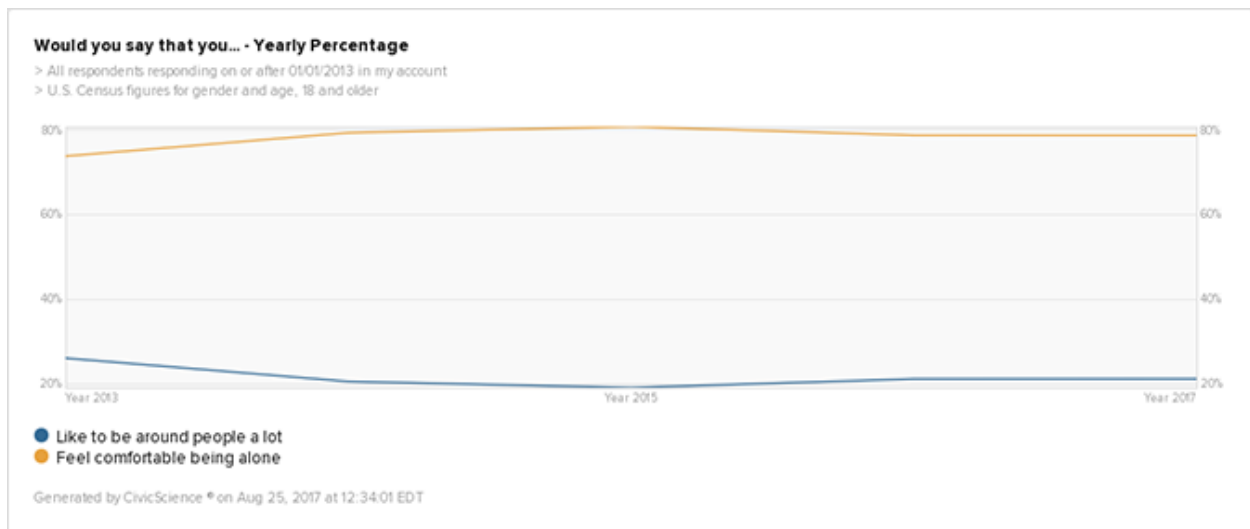
With a relatively quiet week of business or media news, we spent most of our time looking at longer-term trends. Here are a few things we're seeing:

**Consumer confidence has barely budged.** This is only interesting because of how uninteresting it is. Keep in mind that [our most recent two-week reading](#) encapsulated Charlottesville, the kind of event that has typically jolted economic sentiment over the past year. The fact that we've seen so little reaction in our numbers should be a positive sign.

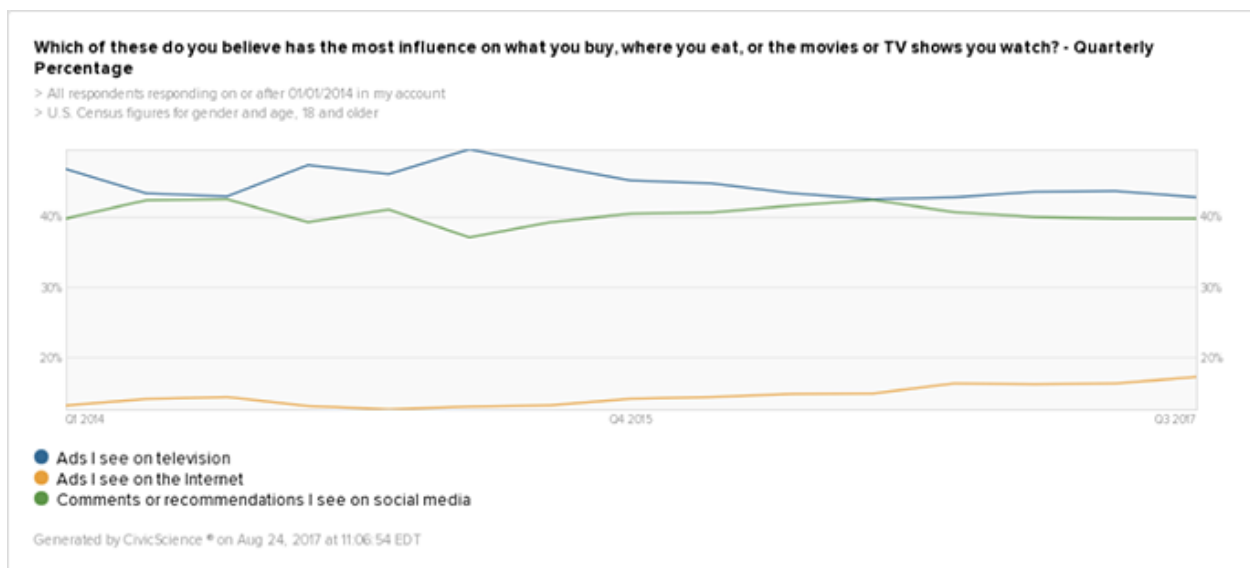
**Ad blocker usage continues to climb, particularly on mobile.** This isn't a pretty trend for media types – at least those that don't have a strong subscription strategy. Consumers are getting both increasingly fed up with the current ad ecosystem and savvy in implementing solutions.



**Here's one chart, without further comment, that helps explain the rise of Netflix, Amazon, and food delivery; and the decline of physical retail, restaurants, and movie ticket sales:**



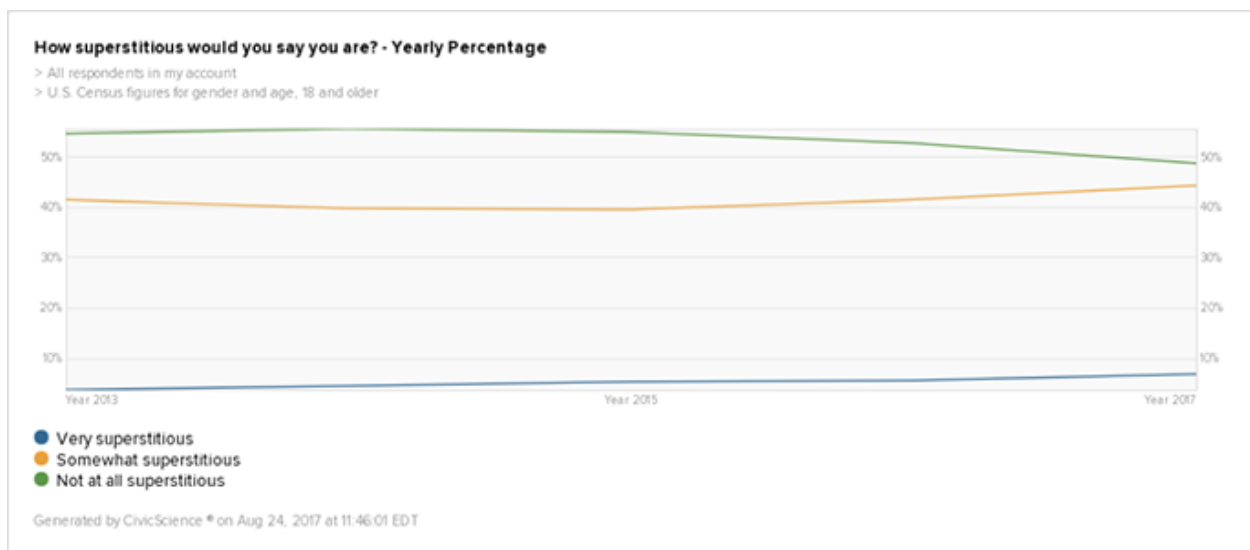
**Consumers are most influenced by different types of media at different times of the year.** For my marketer friends, this might be the most important chart you'll see in this email today. Notice a few things: First, the gap between TV advertising and social media is getting smaller and smaller. Second, TV ads and social media have been closest in parity during the third calendar quarter for three straight years – and the trend appears to be repeating in 2017. And third, Internet advertising has shown a steady, if modest climb since 2015. This seems counter-intuitive to our ad blocker data above, right? Maybe it's simply consumers saying, yes, I'm seeing fewer online ads but the ones I *am* seeing are having a greater impact.



**And what kinds of ads move the needle? Funny ones.** If you want to produce branded content that resonates, comedy is king and that hasn't changed much over time. But "informative" ads have risen as the most impactful from 16% to 23% since January of 2016. More and more people just want the facts. So, come up with a funny AND informative ad and you'll have a blockbuster on your hands.

### Random Stat (Trend) of the Week

Americans are becoming increasingly superstitious. In fact, people who say they are at least "Somewhat superstitious" have moved into the majority for the first time this year.



The number of Americans who are "Very Superstitious" has risen from 4% in 2013 to 7% in 2017, an increase of 75%.

And now you have Stevie Wonder stuck in your head, don't you?

Hoping you're well,

**JD**

## The NFL Slide Accelerates (9/30/2017)

Have I told you how much I love sports? I'm a fanatic. I played just about every sport you can think of as a kid. I collect memorabilia and even display it. I'm in three Fantasy Football leagues and have never watched an episode of *Game of Thrones* because it conflicts with Sunday Night Football (No, I don't have time to record and watch later, on account of the three Fantasy Football leagues I have to keep up with).

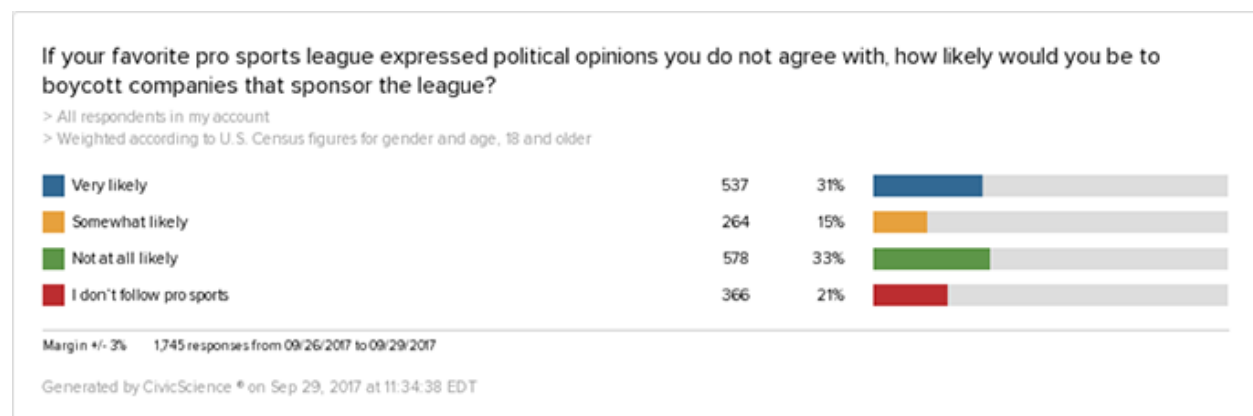
Sports are my escape from most of my (and the world's) problems. So, I'm super-excited anytime I can research and write about sports.

Except, this week. This week, sports sucked big-time. This week, sports ARE the problem.

Here are a few things we're seeing:

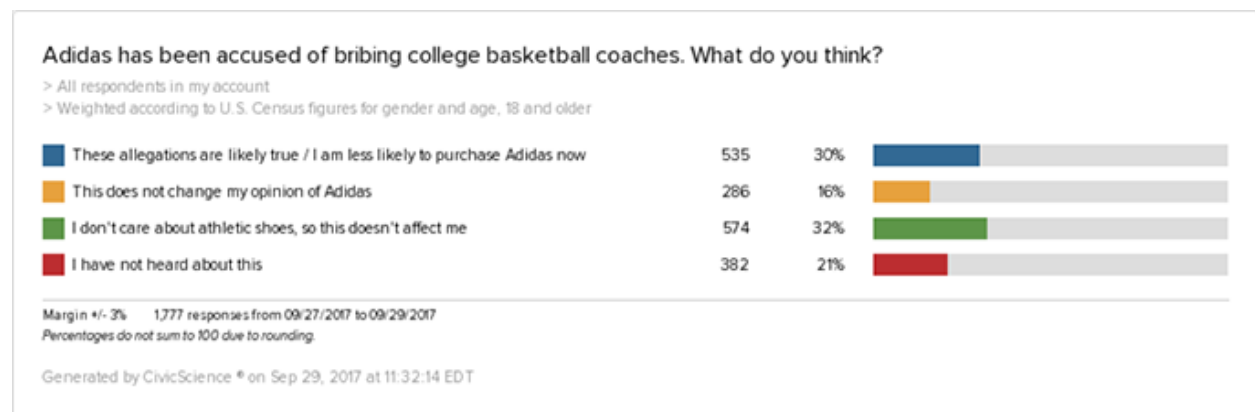
**The latest round of player protests may not scare more NFL fans away, but it's making it much harder for the league to win people back.** One of our senior analysts, Casey, had written a piece about NFL fan attrition last Friday and I came THIS close to telling you about it in last week's email. Then, POTUS called the players a bunch of SOB's and we knew the fireworks were coming. [Casey's write-up](#) on the before & after numbers is worth a quick read. TL/DR; Last Sunday's drama didn't necessarily offend a larger wave of NFL fans – it just made all of the people who were already leaving the sport much more resolved to never return.

**If that's not bad enough for the NFL, these pissed-off fans could punish the league's sponsors if they're not careful.** Take a look at the chart below. 31% of U.S. adults say they would be Very Likely to boycott companies who sponsor leagues that are on the wrong side of political issues. These boycotters are much more likely to be affluent men between the ages of 55-64. I'm guessing that's a pretty valuable demo to the NFL.

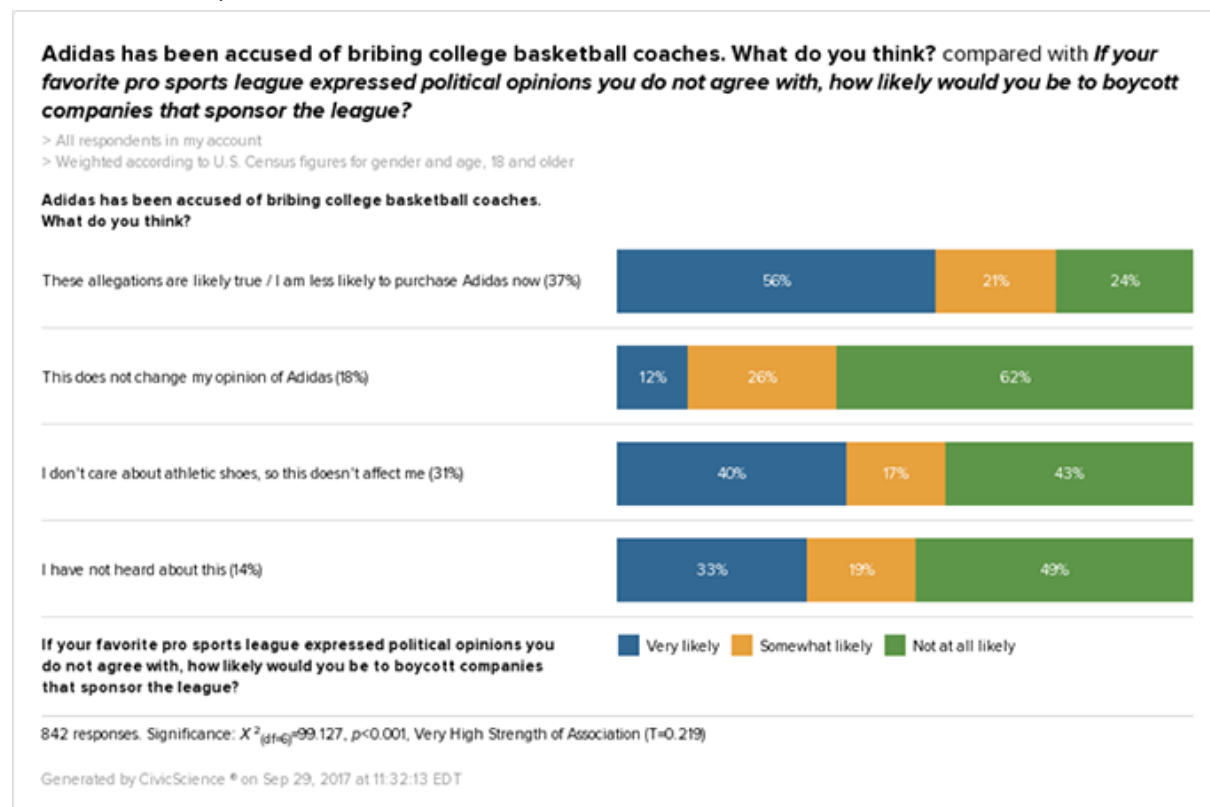


Oh, and the NFL wasn't the only sports organization in a spot-of-bother...

**The current NCAA basketball scandal and the role shoe companies played in it could halt the growth Adidas has been enjoying.** 30% of adult consumers say they are less likely to purchase Adidas products based on the allegations that they bribed college basketball coaches. The saving grace for Adidas is that younger consumers are much less likely to care – and they're the ones who are more influenced by sports marketing to begin with.



And here's the punch-line:





**It's all basically the same people.** Just look at the blue box at the top of this chart.

Some people are hyper-sensitive to the mix of sports, ethics, and politics and some people just don't care. The problem is that today (as I've told you a hundred times by now) politics are driving consumer behavior for 30-40% of Americans (roughly the same percentage who voted a certain way last year) in unprecedented ways. Maybe they're all bluffing. But what if they're not?

We did spend some time on things other than sports.

**People are changing as healthcare consumers in lots of different ways.** We published two different pieces of research on this topic this week. One found that [Americans are less concerned](#) about the state of healthcare than they were two years ago. There's reason to believe this is correlated with proliferation of the Affordable Care Act (No, I'm not defending it; please don't send me hate mail). As more people have health insurance, the less likely they are to worry about healthcare. You don't need to be a data scientist to figure that out.

**People who are most likely to switch health insurance providers go to the movies 36% more than average.** That was just one of a list of [10 healthcare-related tidbits](#) we wrote about. I liked this movie-related one because I know there are a lot of insurance-company types who read this email. Strikes me as useful.

Some Random (Vacation) Stats:

- 55% of Americans prefer beach vacations over all others
- 19% prefer camping or hiking vacations
- Cruises and learning/experiential vacations are tied at 13%
- 55% of people have gone or would go on vacation by themselves
- 46% of people love camping; 30% hate it.
- 22% have never been camping

What has two thumbs and hates camping? This guy.

**Hoping you're well,**

**JD**



## The Evolution & World Domination of Netflix (10/7/2017)

Good morning! Or whenever. Our analytics tell me that some of you don't even read this until as many as four or five days after I write it (Yes, I know you're very busy and you get a million emails, so I appreciate that you can find time at all). It does make me think about the relevance of the timelier things we cover, however. With the pace of news and change today, a few days can be an eternity. I'll try to maintain a balance between the timely and timeless.

I'm flying to San Francisco on Monday for a speaking gig and a few days of visiting clients and friends. If you're in the vicinity and would like to meet up in person, I would be delighted.

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

**Consumer confidence fell, albeit slightly, over the past two weeks.** What's more notable is that this was the [fourth consecutive down-and-to-the-right reading](#) of our Economic Sentiment Index. Maybe nothing to worry about, given that the overall decline is marginal, but it would be nice to see things trend upward. The best news is that confidence in making major purchases seems to be rebounding, with the holiday shopping season just around the corner.

**The nation of Netflix users is changing as fast as it's growing.** I came across a study we published in May of 2015, examining the profile of then-Netflix watchers and yet-to-be watchers. So, [I reran the report this week](#) to see how things have changed. Obviously, Netflix has grown considerably in the past 29 months. What I found most interesting was how much the profile of users has evolved. Gen X parents have eclipsed Millennial singles. Average income has increased, while price-sensitivity has decreased – both considerably. New Netflix users are social media junkies, relative to their pre-2015 forbearers. All of those things have a huge impact on the media landscape.

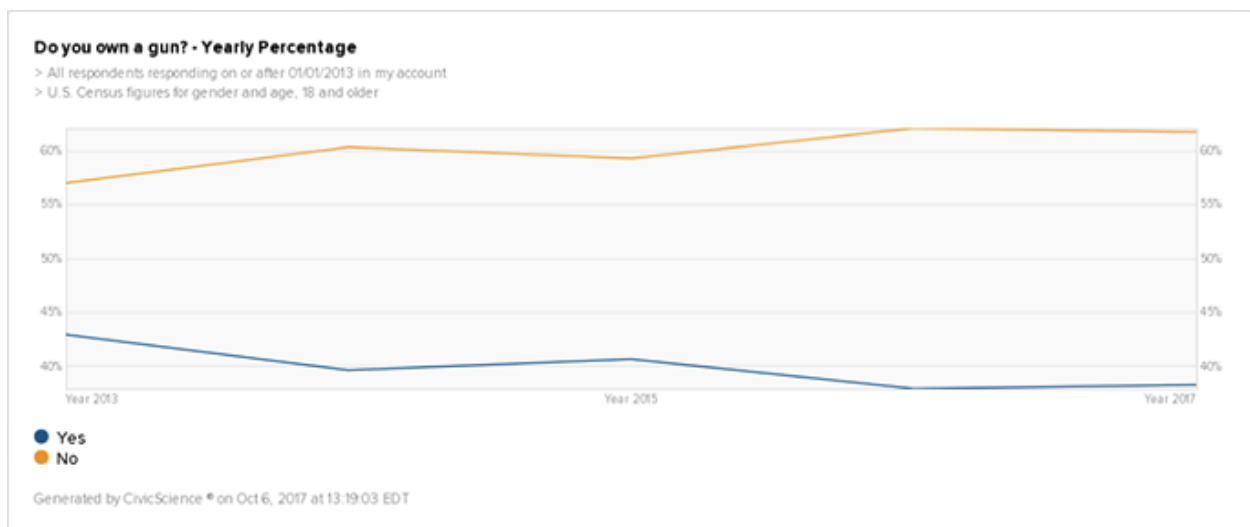
**Speaking of 2015, we were closer then to foretelling the current socio-political maelstrom than we realized.** My “Facebook Memories” reminded me this week of [an article I wrote for the Huffington Post](#) two years ago (that's one year and three months P.T.), on the heels of that summer's SCOTUS gay marriage ruling and Confederate flag

dust-up in South Carolina. It's surreal to read it now. In short, our data found that Liberals were much more likely to be outspoken about controversial issues on social media. This, in turn, had the effect of discouraging Conservatives from speaking up, for fear of being alienated. The article insinuated that there was a large, under-heard portion of the electorate that the broader populous and the media didn't understand. I'm not sure how much that has really changed since.

**On a lighter (pun intended) note, Weight Watchers has been one of the best turn-around stories of 2017.** We [started seeing signs](#) of renewed consumer enthusiasm – tied primarily to new apps, a community program, and the brand's alignment with Oprah – at the beginning of the year. Now subscribers are up over 20% and their new move into fresh meal kit delivery has the look of a winner. This is more bad news for already-hurting Blue Apron, by the way.

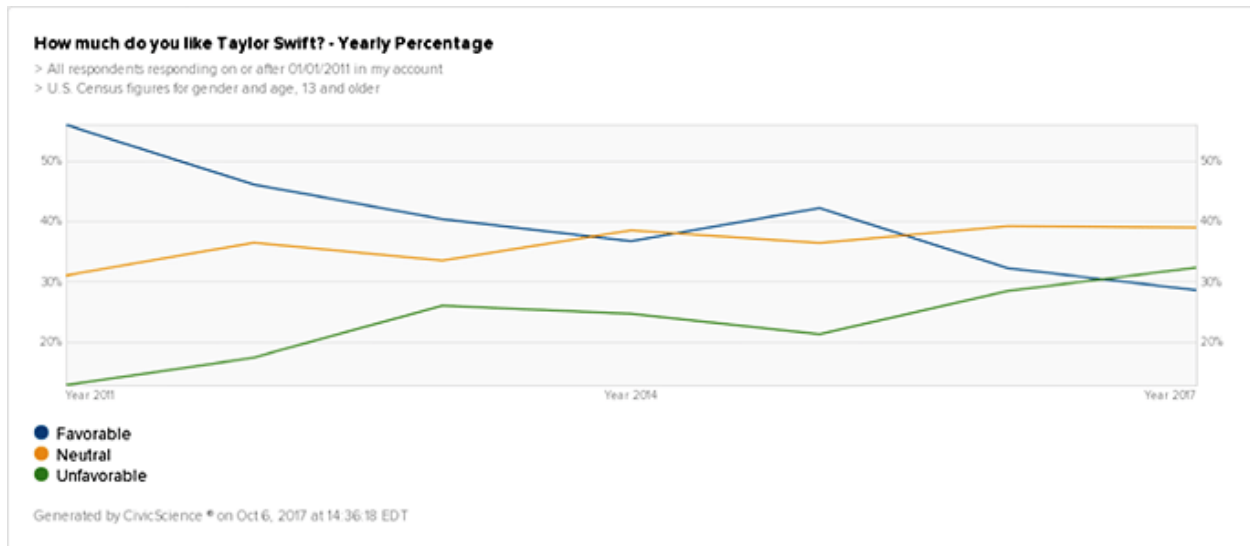
**Amazon is an increasingly popular place to buy clothes – but not a popular place to buy fashion.** We [published a write-up this week](#) examining the favorability toward numerous apparel retailers among fashion-forward consumers. Before this year, Amazon ranked 21st on our list. This year they rank 26th. Add this to a very small list of things Amazon isn't disrupting – yet.

**The rate of gun ownership in the U.S. has declined significantly since 2013.** In case you were wondering...



And yet, 2016 and 2017 (year-to-date) are the two highest years for gun sales in American history. So, yes, a smaller and smaller number of people are buying more and more guns. Just thought I'd point that out.

**Random Stat of the Week:** For the first time since we began tracking it, the number of people who dislike Taylor Swift is larger than the number of people who like her. Even my two daughters disagree with each other on this one.



**Hoping you're well.**

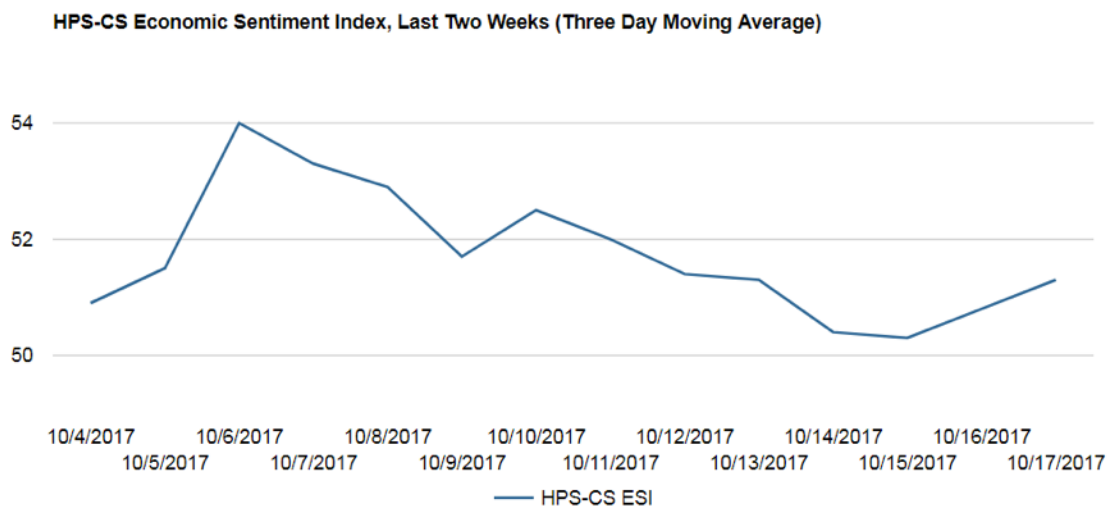
JD

## The Movie Industry Sucked in 2017 (10/21/2017)

Good morning and Happy Saturday. I'm heading to Orlando next week to give what promises to be a pretty provocative talk at the TMRE market research conference. If you or any of your colleagues will be in the area, I'd love to meet up. Anything to keep me from walking around an exhibit hall squinting at people's name tags all day.

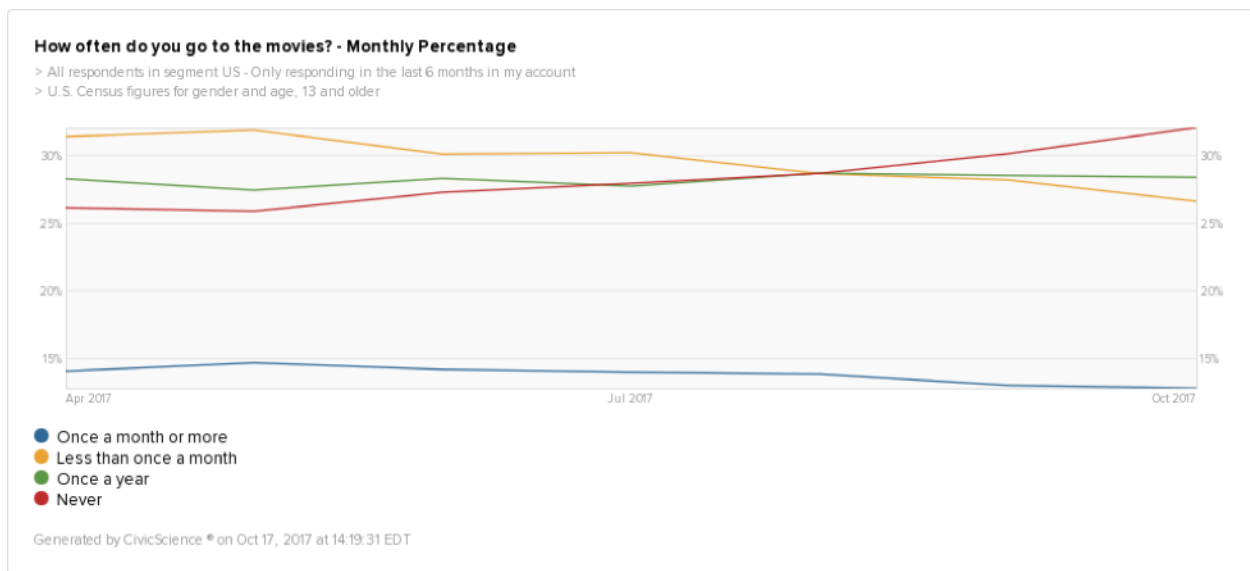
Here are some cool things we're seeing right now – a little more positive than last week:

**U.S. economic sentiment had a nice rebound.** Our [latest reading jumped more than a full point](#) after four consecutive periods of decline. Confidence in the housing and job markets accounted for most of the statistical climb. It's worth pointing out that the majority of the increase happened in the first few days of the cycle. Things then fell over the next 10 days and began trending up again. This is why we believe [Michigan's number](#) showed such a huge spike last week – they had reported before the drop we saw below.



**Sports activism doesn't always suck.** Building on the LGBTQ research we started a few months ago, we're studying if/how companies benefit when taking a positive stance on LGBTQ rights. This week, [we looked at the implications in sports](#) – namely, the major pro leagues that have actively supported or developed LGBTQ programs. In short, the NHL, MLS, and NBA are really winning with LGBTQ consumers, particularly Millennials. The NFL, not so much.

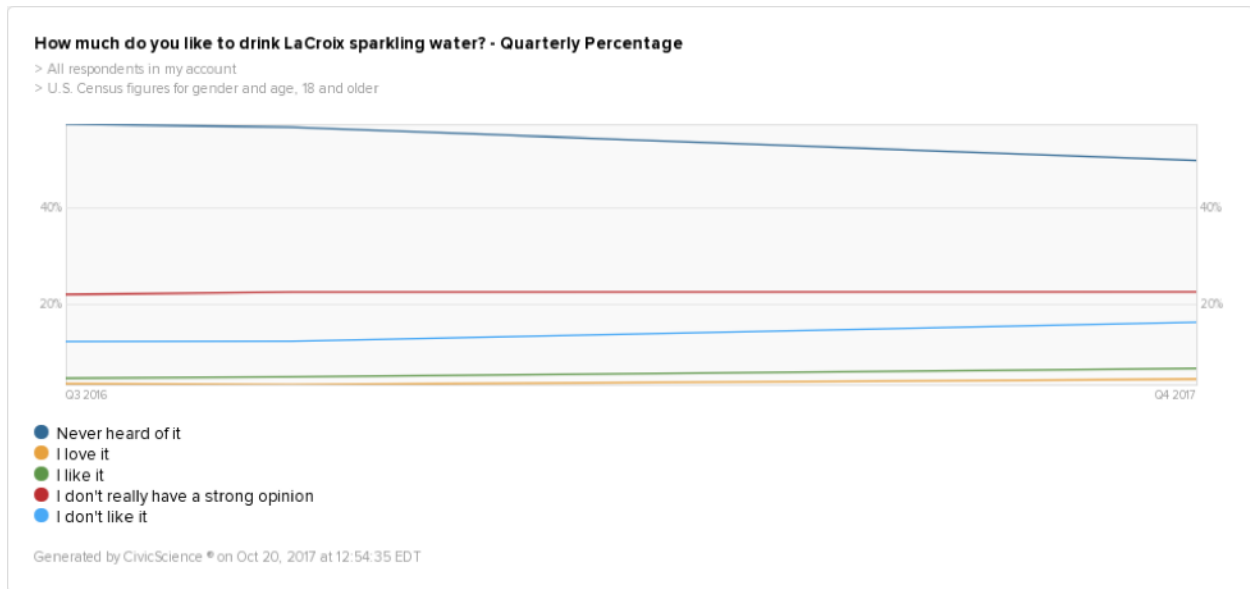
**The new Star Wars movie can't come soon enough for the movie industry.** After the worst summer box office numbers since I was in high school – that would be the year *Honey I Blew Up the Kid*, *Lethal Weapon 3*, and *Encino Man* headlined the summer line-up – movie-going in the U.S. isn't showing any signs of improvement (check out the red line below). We studied whether a title like *Blade Runner 2049*, with its huge budget and star-studded cast could bring casual movie-goers back into the theaters (short answer: no) or whether the new *Star Wars* can or will (probably). Maybe they should move up that December launch date.



**Driverless cars still have a PR problem.** Between Uber and Argo AI (that's Ford's big autonomous vehicle bet) doing all of their development here, it seems like every other car in our Pittsburgh neighborhood right now is a driverless one, cruising around with one of those spinny things (at least I think that's the technical term) on the roof. Everyone I know who has ridden in one said they felt safe, and my friends who work on those projects say they're safer than any human-driven car on the road. Unfortunately, nobody else is buying it. Even with newly-enacted government regulations, the clear majority of Americans say they wouldn't feel safe in a self-driving car. The numbers look a little better among Millennials but still not great.

**We drink a ton of LaCroix in our house but I wouldn't invest in the stock.** For an emerging brand like LaCroix, we should see more up-and-to-the-right trajectory in the numbers below. In fact, the only line that appears to be climbing is the "I don't like it" one. If our house is any indication, LaCroix has a competitive barrier problem (i.e. no

competitive barrier). Once our local grocery chain started offering private-label canned sparkling water at half the price, it was a no-brainer to switch.



**Instagram has now surpassed Twitter in its usage among Baby Boomers.** In fact, [social media usage among Boomers overall](#) has increased by over 20% in the past 18 months. Yep, everybody's doing it.

### Random (Flying) Stats of the Week

- 43% of flyers are freaked out by turbulence
- 56% of flyers SAY they pay attention when the flight attendant goes over the safety guidelines
- 57% of flyers get annoyed when the person in front of them reclines their seat
- 26% of people have a fear of flying
- 67% of flyers prefer the window seat; 31% prefer the aisle

And if you just did the math, you'd know that 2% of people prefer the middle seat. WTF?

**Hoping you're well.**

**JD**



## The Humble History of this Email (10/28/2017)

I wrote the first of these emails one year ago this weekend. I haven't missed one since – not for a holiday, a vacation, or even the occasional Category 5 hangover.

It wasn't even my idea.

Ivan Martinez, a marketing genius at United Healthcare, suggested it at our client summit in San Francisco last fall. He even coined the title. He thought the execs we work with would enjoy a more well-rounded view of the things we study, not just the category-specific data we pipe to them all the time.

But important people are busy and inundated with emails all week.

I stole the bite-sized (today's email, notwithstanding) format from Mike Allen of Politico-then-Axios, and the tone from music industry guru, Bob Lefsetz – one of the most authentic and penetrating writers you'll ever read.

Yeah, I basically ripped off the whole concept and execution. Except the Saturday thing. Everyone says you're not supposed to send mass emails on the weekend. That's on me.

A whopping 49 people (mostly clients and friends) read that first email, which covered the AT&T/Time Warner merger, food additives, and local news. Last week, 654 people read it – still laughable to those of you who have millions of people reading everything you write.

But the make-up of those readers is pretty cool. Last week, I identified eleven CEOs of companies you know, multiple members of Congress, two big-city mayors, several prominent journalists and editors, a two-time Super Bowl champion, two people who have appeared on *Silicon Valley*, and Mark Cuban, whose name I will shamelessly drop until he tells me to stop – or becomes President – whichever happens first. The rest of you are awesome, too.

It's tempting to go trawling for more readers. Our marketing team thought about turning this into a search-optimized blog or a regular post on Medium or HuffPo or whatever. My friend Bracken talked me out of that. He made me realize that I write it more for me than for you. That would change if I wrote for eyeballs.



So, as long as one of you opens this, I will keep writing it. And the list of readers will only grow if we invite them – or you do.

For those of you reading this for the first time, this is way, way more than I ever write before getting to the good stuff. **Won't happen again, I promise.**

Here are some of the more notable things we've seen over the past year that are still happening right now...

**Trump changed everything.** He was elected four days after I first wrote to any of you. All of a sudden, [people who were thinking about switching banks](#) (Democrats) no longer did, while people who *weren't* thinking about it (Republicans) now did. In the mobile carrier space, the effect was the exact opposite, with Dems becoming switchers and Rs staying put. People's media – social, et al. – habits changed, as they looked for safe havens where their beliefs would be constantly affirmed. Even [brand preferences began shifting](#) as the President took aim at companies he didn't like and others took aim at him. Don't get me started on [the NFL](#).

**Every day, more and more people just want to stay home.** Trump exacerbated this too, as our data show that people have literally become avoidant of others who disagree with their beliefs or politics. Every time a national tragedy happens, like the recent Las Vegas shooting (which almost always occur during [the same six-month period](#)), a few more people decide to stay in, order food delivery, and watch Netflix. Whether Jeff Bezos is accelerating this trend, or just riding it, is hard to distinguish – but the parallels to Amazon's growth are undeniable. And it's proven to be terrible news for the movie industry, casual restaurants, big-box grocers, and pretty much every retailer who hasn't cracked the online puzzle (oh, and dollar stores).

**Hispanic consumers have been taken for a ride.** We saw an immediate and extreme down-turn in consumer confidence among Hispanics starting last November and bottoming out in February. They stopped spending (and going out), which was more bad news for Hollywood, as Hispanics go to the movies at nearly twice the rate of others. Fortunately, Hispanic sentiment has slowly improved (particularly with [Millennial Moms](#)), with an occasional blip every time immigrant travel bans or ICE make headlines. Still, if you're in the e-commerce space, streaming, delivery, or all-online banking, and you're not aggressively targeting Hispanic consumers, what are you thinking?

**McDonald's seems to have gotten its shit together.** When they launched their [signature line of sandwiches](#) in the spring, we saw uncannily-similar consumers signals to those we saw with all-day breakfast two years earlier. Surely, that wasn't the only reason for growth – deployment of delivery and other promotions contributed – but when a company as big as McDonald's lifts same-store-sales by 4.1% in a quarter, it makes waves across the restaurant industry.

### **Some Random (Happy Halloween) Insights**

- Dog owners (22%) are way more likely than cat owners (1%) to dress up their pets for Halloween;
- 39% of people think *A Nightmare Before Christmas* is a Halloween movie – 27% think it's a Christmas movie;
- 43% of women believe in ghosts but only 29% of men;
- Fans of horror movies are 2X more likely than fans of other genres to dress up for Halloween;
- 30% of Gen Zers have never even heard of the song *Monster Mash*.

Thanks again for indulging me.

Hoping you're well.

**JD**



## Kevin Spacey was a Trendsetter, the Bad Kind (11/4/2017)

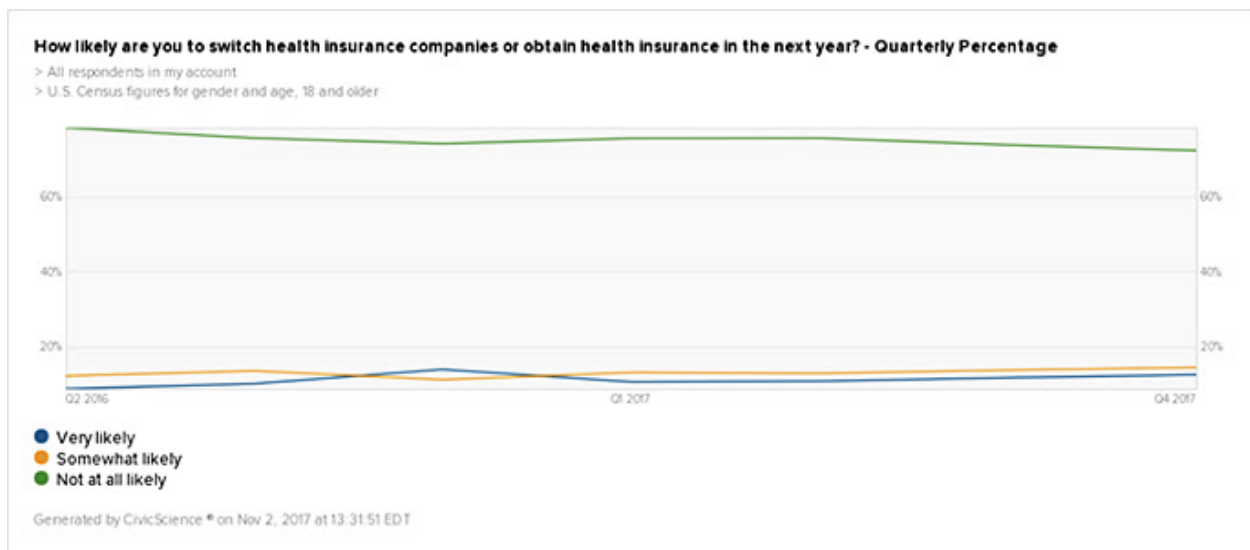
Thank you all for the very kind comments after last week's email. I'll try to keep exercising your brains as best I can.

Here are a few thought-provoking things we're seeing right now:

**Consumer confidence keeps climbing.** Our Economic Sentiment Index jumped almost another [full point in the past two weeks](#), and two points over the past month. The biggest leaps came from improved attitudes toward the housing market and major purchases, the latter of which should be a good sign for the holiday season. With the expectation that more and more consumers will start their shopping early this year, we could see some big-ticket items ringing the cash registers if this warm and fuzzy feeling continues.

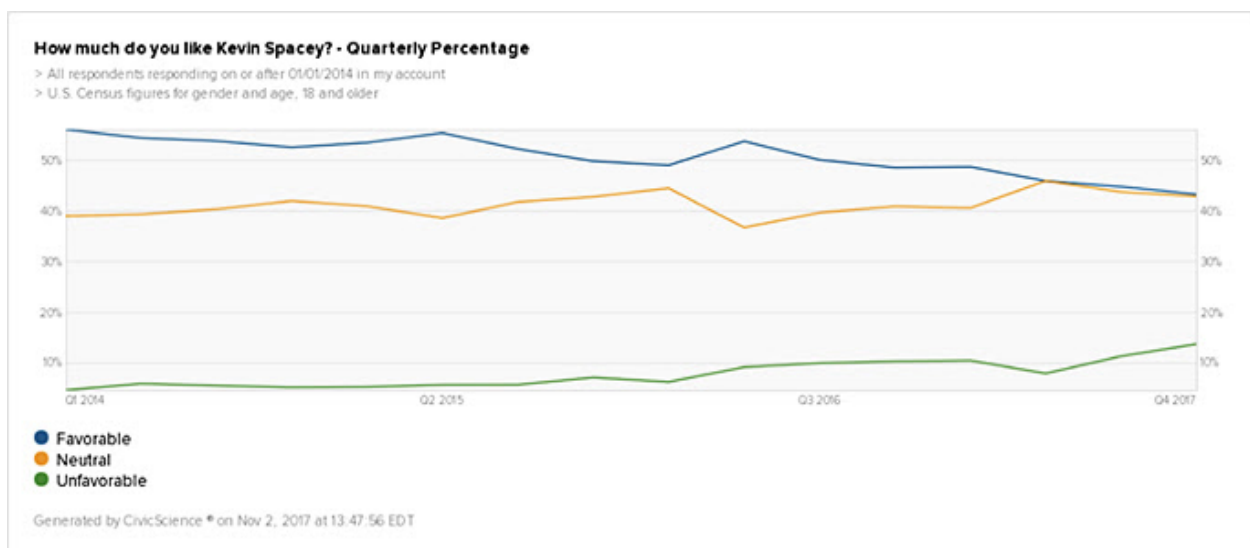
**The Papa John's dude has a point.** Our weekly brand tracking numbers definitely slid for Papa John's since the beginning of the NFL season, particularly in the last 45 days. And, indeed, most of that slide emanated from Republicans, who historically have a 20% more favorable view of Papa John's than Democrats do – and who were much more likely to be offended by the NFL player protests. The company's PR conundrum, however, is interesting. By blasting the league and its players, they may win back some of those begrudged Republicans, but they're also going to push Democrats further away. And, given that Papa John's just renewed its multi-year sponsorship deal with the NFL, you'd think they would be trying to drive fans back to the sport, not vilifying the league even further. I guess they're in a tough spot.

**The number of people thinking about switching health insurers or enrolling for the first time is on the rise.** It may not jump out of the chart below, but the percentage of people who are considering switching/enrolling rose to 26% compared to 22% this time last year. Maybe people want to sign up for ACA while they still have a chance. Or maybe they're fed up with premiums from their current carrier and want to shop around. In any event, it should make for an interesting marketplace over the next couple months.



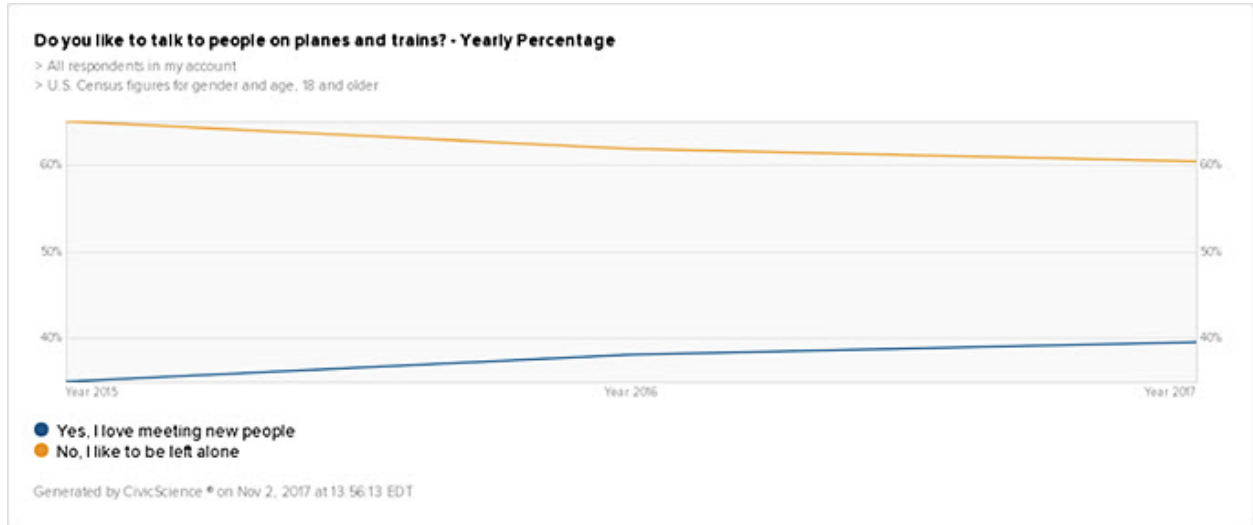
**The hot new form of advertising might be – on the bus?!?! We’ve always kept a close eye on trends in public transportation, particularly as more Americans – and especially younger people – move to the city. Our beloved Millennials are more than twice as likely as my fellow Gen Xers to use public transit once or more each week. Admittedly, a lot of this might be more about life stage than generation. Let’s see how keen those 20-somethings are to take the subway when they’re hauling around two kids, a stroller, and a bunch of soccer equipment. In the meantime, there’s [a strong case to be made for physical advertising](#), aimed at younger, digital-ad-blocking consumers, on the bus, subway, or train – at least until Facebook knows when someone is on the train and can deliver an ad while they stare at their phones. Hell, maybe they already can.**

**Kevin Spacey’s popularity had already been sliding over the past three years.** We saw temporary jumps since Q2, which coincided with that season’s release of *House of Cards*. In 2014, fans of Spacey outnumbered his detractors by more than 9-to-1. Right now, it’s about 3-to-1. And I’ll bet you my original VHS copy of *Usual Suspects* that we never see it that high again.



## And One Random Stat of the Week

It's the first sign I've seen in a long time that we're not all just reverting further and further into our own shells. Maybe there's hope for us after all.



Hoping you're well.

JD

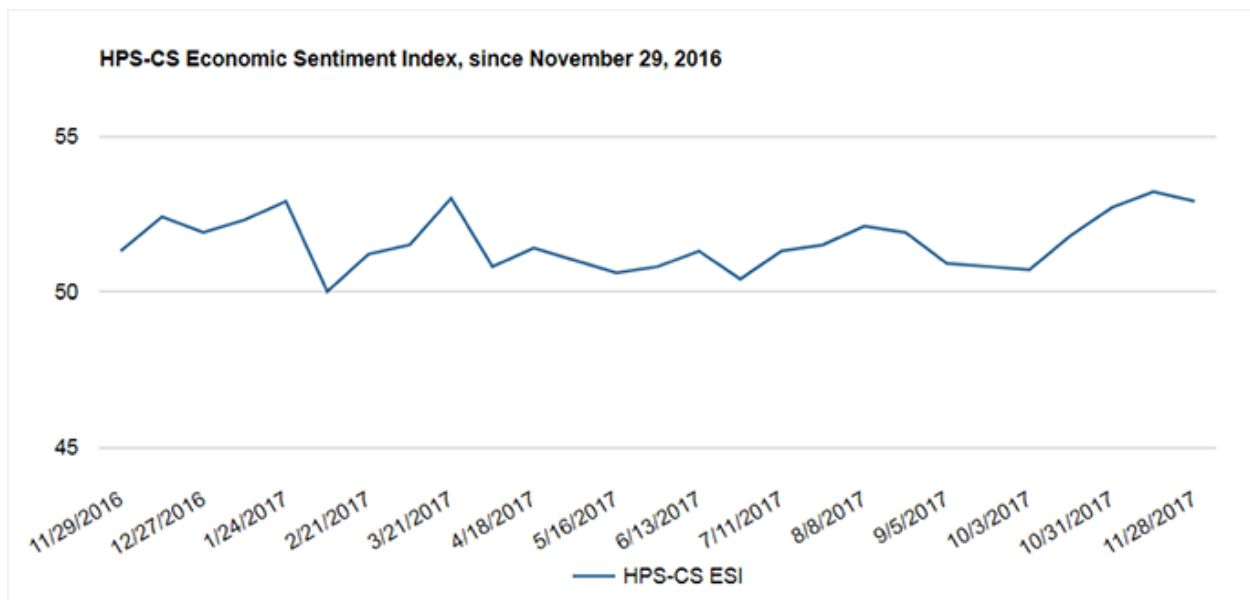
## Black Friday Rocked & We Told You It Would (12/2/2017)

I hope everyone had a magnificent holiday and somehow got through a weekend without my write-up. Whatever could you have read?

Before you ask, no, I don't have any analysis to share on the deluge of sexual misconduct revelations dominating the news. Maybe someday I'll study how this national awakening is impacting media, politics, and the overall social landscape, but now is not the time. Now I just need to listen – and condemn.

Here are a few less-disgraceful things we're seeing right now:

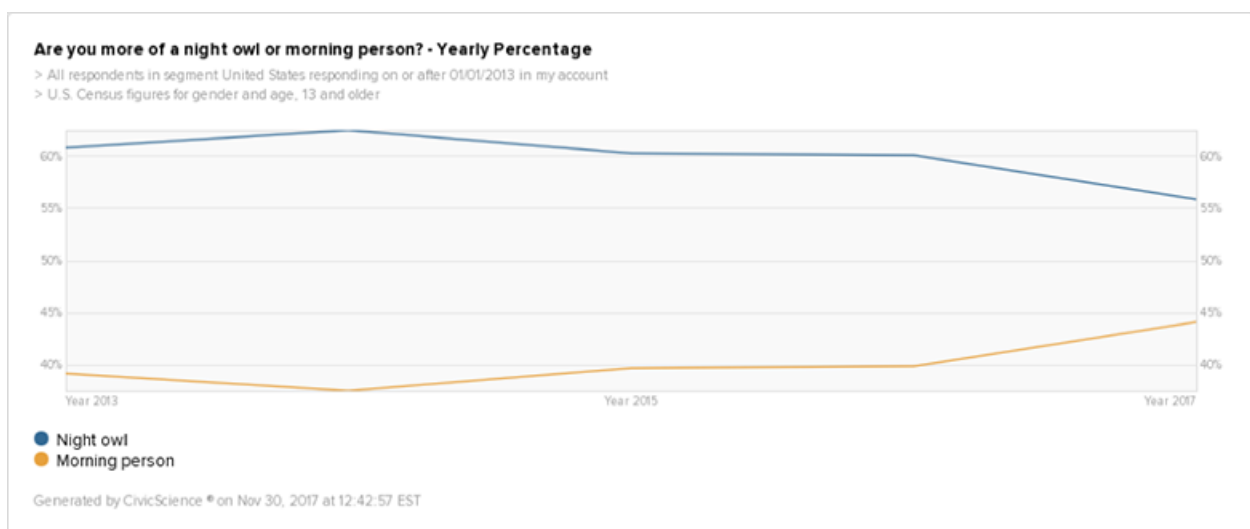
**Our streak of rising consumer confidence came to an end.** It's nothing to be alarmed about, as the dip we saw in [our most recent Economic Sentiment Index](#) was tiny. And it's not even bad news for the holiday shopping season – the drag came mostly from attitudes toward the housing market and job market. Confidence in personal finances and major purchases both climbed nicely over the past two weeks.



**Black Friday weekend was strong for retailers but the season is just warming up.** I [told you](#) it would be good – surpassing both 2015 and 2016, which [the NPD Group confirmed](#) earlier this week. Still, even with an active Black Friday, our data show that 78

percent of shoppers have most, if not all, of their holiday shopping in the windshield. All good signs.

**The gap between Night Owls and Morning People is shrinking fast.** For [as long as we've asked people](#) to identify as either a "Morning Person" or a "Night Owl," the latter represented a clear majority of Americans. In 2015, the ratio of Night Owls to Morning People was 62% to 38%. Today, the ratio is 56% to 44%, cutting the deficit between them in half. I honestly don't know what's causing it – though I share one possible theory below. It's easy to think of some winners (coffee shops and morning news) and losers (bars and late-night TV), if the trend continues.



**In possibly-related news: Millennials are drinking less – much less.** We are by no means the first to discover this phenomenon, but [the supporting evidence in our data](#) is overwhelming. Though more likely than older generations to have the occasional summer cocktail, Millennials are cutting back rapidly on wine, beer (especially craft beer), and spirits (both dark and clear varieties). I guess all of these teetotalers are going to bed earlier (out of boredom) and waking up earlier (to eat avocado toast), thus driving our Morning Person trend above.

**Target's partnership with Taylor Swift is a clear winner.** No, I'm not writing about Taylor Swift to pander to all of [you bait-clickers](#) – it's just a coincidence. But even as [Swift's popularity has waned](#) in recent times, [her favorability among both Target's customers](#) and non-customers remains solid. Why? Because, as [our friends at Gartner use our data](#) to explain, Swift's brand is virtually "bullet-proof," making her [an uncannily safe partner for any brand](#) that can afford her. Ok, so maybe that was click-bait. Gotcha!

Your Random (Really Random) Stat of the Week:

- 59% of people think the chicken came before the egg
- 41% of people think the egg came before the chicken
- Chicken people are more likely to be female, over 65, and rural-dwelling
- Egg people are more likely to be men, under 29, and city-dwelling

Hoping you're well.

**JD**

(A beer-wine-and-spirits-loving, Gen X Night Owl)



# Women Are Getting a Terrible Deal & Millennials Aren't (12/9/2017)

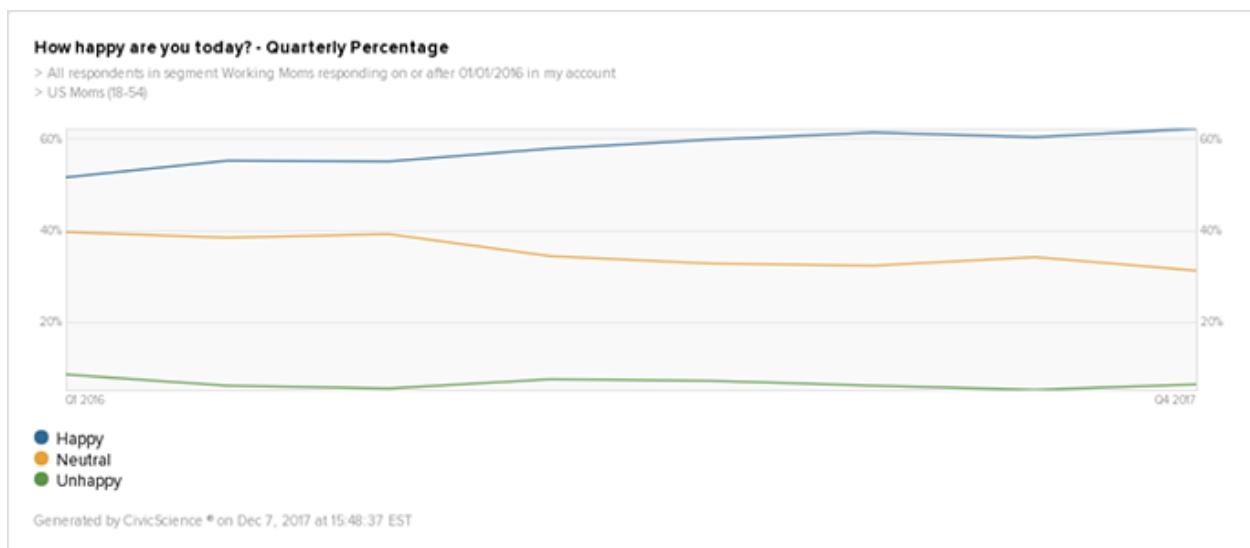
OK fine. Maybe it was a cop-out not writing last week about all of the sexual misconduct incidents in the news. At least that's what a handful of you told me.

The truth is that it will take time to understand the long-term impact this awakening will have on our socio-political fabric. What we're seeing today may not be indicative of what we see weeks, months, or years from now. Are we nearing the end of all the public accusations, admissions, and fallout, or have they only just begun? I'm fairly certain it's the latter.

For now, what we can say is the same thing we said about gender inequities 15 months ago:

**Women are getting a terrible deal.** Even without all of the sexual harassment and assault they've faced from men in positions of power, [professional women have the cards stacked against them](#) at home and at work. They have more – and increasing – household and financial responsibilities, are working at nearly as high a rate as men, and make less money for doing the same job. Working moms, especially, report significantly higher levels of stress and lower levels of happiness than their male counterparts. Men, meanwhile, think they're carrying an equal load. They're not.

**But there are signs of hope.** Working moms have shown steady increases in their levels of happiness since January of 2016. Look:



**The percentage of working moms who identify as “Happy” has grown 10 full points in just under two years.** Maybe this improved life state has given women more confidence to speak out, to feel more secure in their jobs and their family roles, and to reject the culture of male privilege that helped land us in the situation we’re confronting today. I’d like to think that’s true. But what I think right now doesn’t matter.

Here are some other things we’re seeing in the world:

**Chipotle has a rare opportunity to win back the Millennials they lost.** You can read more about [our rationale here](#), but the gist is that young consumers who migrated away from Chipotle over the past couple years didn’t turn their backs on the brand completely – which is unusual for fickle Millennials. I actually started the article by saying “Writing about Millennials is like emptying my dishwasher. It seems like I have to do it all the time.”

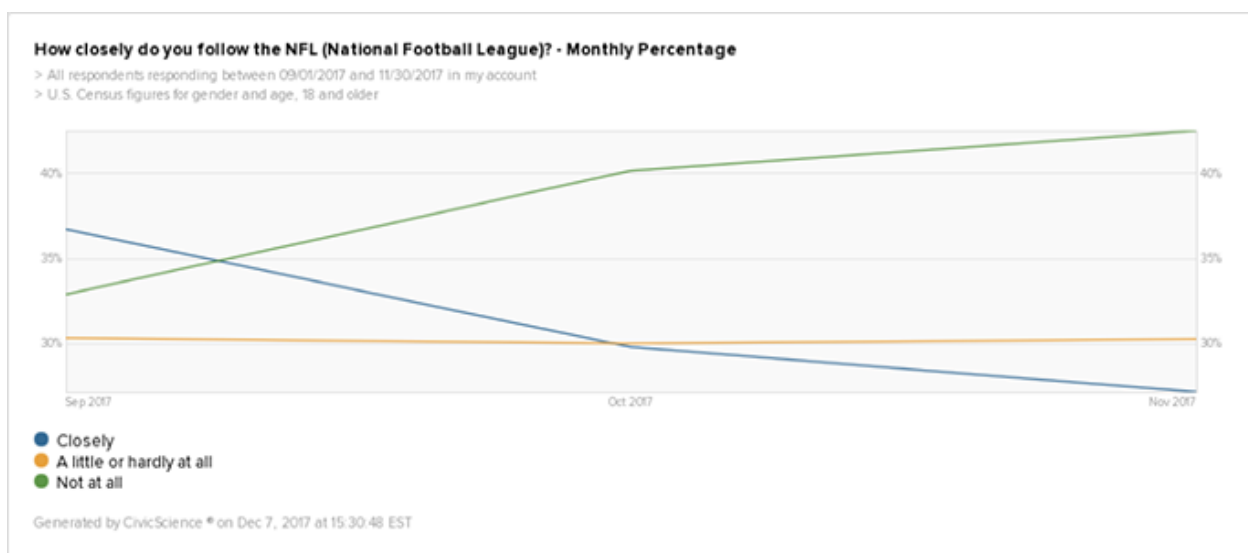
Appropriately...

**All Millennials are not created equal.** One of our biggest soapbox issues is that marketers often (and lazily) mistake “generational” attributes for “life-stage” ones. I once had a director from a well-known zoo call me, freaking out, asking if we could help them figure out why Millennials weren’t going to the zoo. I said, “When did 25-year-olds without kids ever go to the zoo?” That was the end of that conversation. People between the ages of 18 and 34 represent an array of dramatically-different life stages: Some still in college, some living at home, some with kids, some without kids, some married, some even divorced, etc. To categorize them with one encompassing label is silly. So, we’ve started researching different sub-segments of Millennials. Even if you’re too busy to read [this first little report](#), just remember from now on to take sweeping “Millennial” insights (mine included) with a grain of salt.

**The pissed-off NFL fans weren’t bluffing.** Check out the month-over-month decline in NFL followers since September. Yikes! All I can say is that I envy the heck out of Roger Goodell. I wish my board would give me a \$40M annual salary even with customers fleeing like this.

## But you will find NFL fans – and other valuable consumer audiences – on Twitter.

It's hard to put a label on Twitter's user base. If I say "Snapchat," you say "Young." If I say "LinkedIn", you say "Professional." If I say "Pinterest," you say "Women." If I say "Facebook," you say "Everybody." But if I say "Twitter," what do you say? Ultimately, I think advertisers and Wall St. struggle to put their finger on Twitter's value because of this labeling problem. In the end, [our data tell us](#) that Twitter has a super-valuable and growing audience. They're tech early adopters and influencers, restaurant aficionados, prolific content consumers, avid sports fans, and activists. But they're also men, women, White, Black, young, not-so-young, rich, and not-so-rich. It presents quite the branding conundrum but a great opportunity if it can be unlocked.



## Your Random (Futuristic) Stats of the Week

- If time travel were possible, 70% of U.S. adults would prefer to go back in time;
- 30% would prefer to go into the future;
- The results are heavily age-dependent, with older people preferring to go back and younger people preferring to go into the future;
- 17% of people have written a message to their future self;
- 25% of people believe in psychic power;
- 44% of Americans would choose to see their own future, if they could.

Here's hoping your future is awesome.

JD

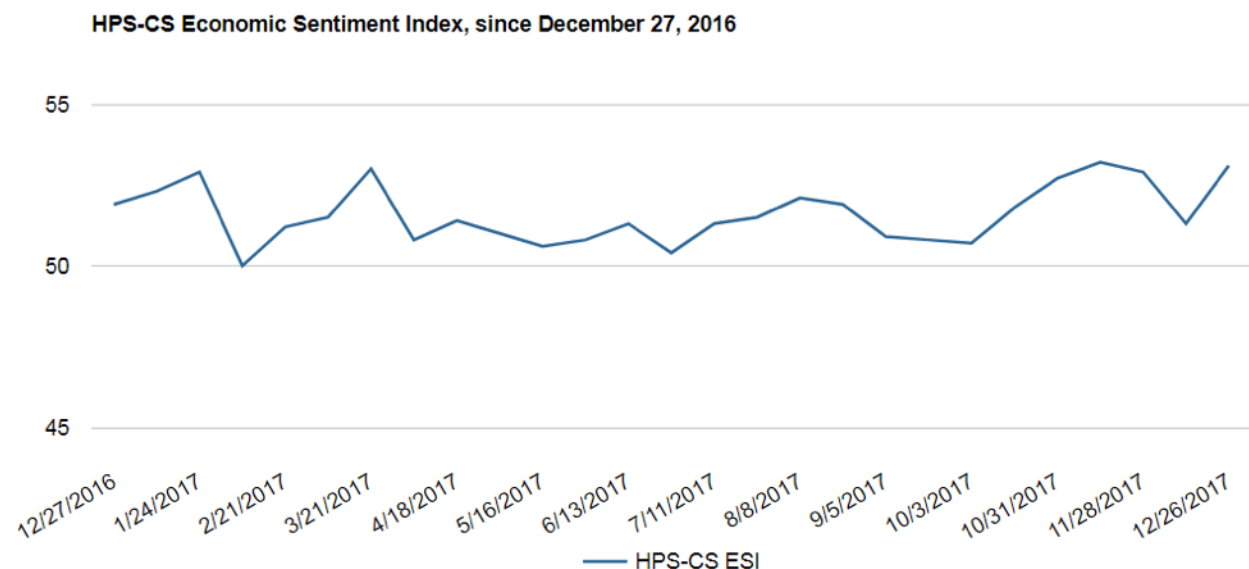
## Amazon Is Everything (1/8/2018)

Welcome back, friends. I hope your holiday was as fabulous as mine. I watched the entire Harry Potter series with my kids, lost track of what day it was, let a gazillion emails sit idly in my inbox, and almost ran out of wine. So, yeah, it was pretty awesome. Thanks for asking.

FYI- I'm heading to Atlanta next week to visit clients for a few days. If you're in the 404 with time to visit, hit me up.

In the meantime, here are some interesting things we're seeing as the new year gets rolling:

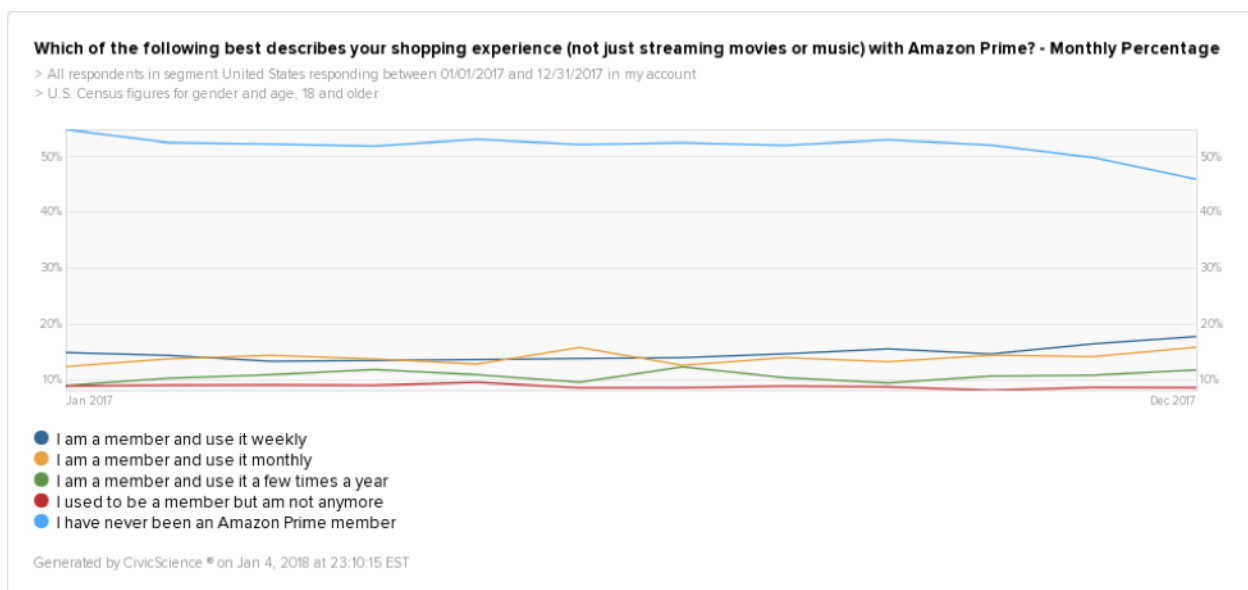
**Consumer confidence ended the year on a major upswing.** After a steep post-Thanksgiving drop, [our Economic Sentiment Index](#) bounced right back in the days leading up to Christmas. Whether it was good old-fashioned holiday spirit or the federal tax bill (probably both) the rebound was driven by a big spike in optimism toward the U.S. economy. Hopefully, we'll see the evidence in last-minute holiday spending and strong momentum going into 2018.



**We are becoming a nation of hermits.** A whopping 31% of Americans say that [their desire to leave the house](#) has decreased over the past six months. That number climbs to 35% among women. I could give an entire presentation about why this is happening

(actually I have) but you could probably figure most of it out for yourself. We don't like being around strangers anymore – particularly people with different views from our own. We're afraid of the next act of violence – especially in crowds. And Amazon, Netflix, and Postmates make it too easy for us to stay in our slippers all day. See also: My holiday staycation.

**Speaking of Amazon, feast your eyes on this.** After relatively steady adoption numbers throughout 2017, the growth in Amazon Prime users before the holidays was pretty incredible. In November, for the first time, a majority of U.S. adults identified as Prime members and the number peaked at 54% by year end. Adults who use the service “at least weekly” grew 20% from October to December. I repeat: 20% growth. In 90 days. That's nuts.

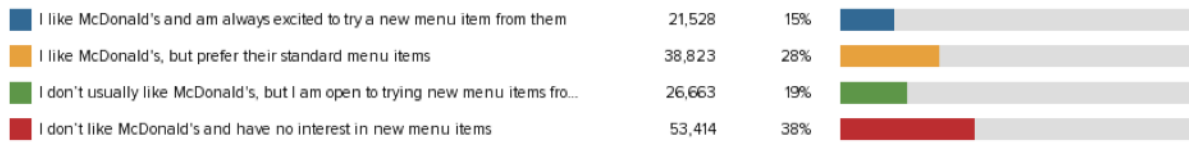


**Watch out for McDonald's in 2018.** In the middle of a solid turnaround (not that things were ever that bad), Mickey D's relaunched its Dollar Menu this week, no doubt striking fear in other price-centric QSRs. But we're seeing something even more promising for the Golden Arches in our data. We've tracked the question below on a weekly basis since early 2016 and the third response – “I don't usually like McDonald's but I am open to trying new menu items” – has always been fairly flat. That is, until the past few months, when that number began climbing. It's up 3 points in just the past 60 days, a strong indication that negative stigma for McDonald's might be dissolving. What's even more interesting is WHO these new, open-minded consumers are. But I can't give everything away now, can I?

Based on what you have seen or heard about new menu items being offered at McDonald's, which of the following best describes your feelings?

> All respondents in my account

> Weighted according to U.S. Census figures for gender and age, 18 and older



Margin +/- 1% 140,428 responses from 02/15/2016 to 01/05/2018

Generated by CivicScience ® on Jan 5, 2018 at 08:53:55 EST

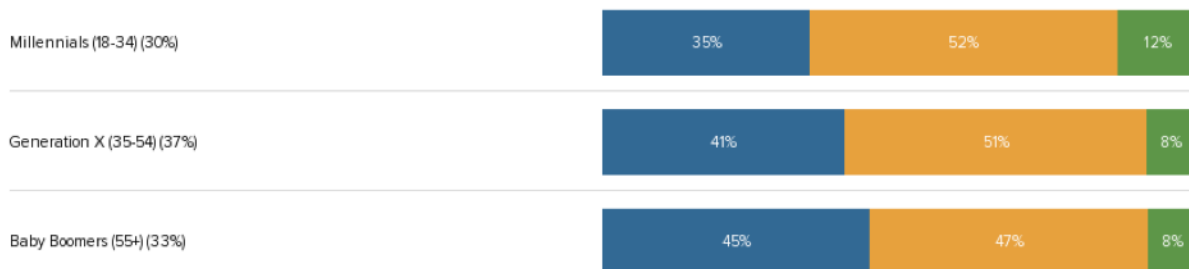
**The war on commercials is an ageless one.** As media companies and advertisers fret over consumers' increasing ability to avoid ad content (see: ad blockers, time-shifted TV viewing, etc.) the conventional wisdom has been that this is primarily a younger, tech savvy-person problem. But just because Baby Boomers might be *seeing* commercials, doesn't mean they're working. Check out the chart below. Boomers have their own tried-and-true technology for ducking commercials – the mute button – and they do it at a rate far more frequent than younger cohorts. This would seem to be important for brands in pharma, financial services, or other categories aimed at older consumers. Use more text on the screen. And, as someone who is about to get his first ever pair of glasses, I can say this without sounding ageist – use large fonts.

**To what broad age group do you belong?** compared with **Do you typically mute commercial breaks when you watch TV?**

> All respondents in my account

> Weighted according to U.S. Census figures for gender and age, 18 and older

**To what broad age group do you belong?**



**Do you typically mute commercial breaks when you watch TV?**

■ Yes ■ No ■ Does not apply

14,810 responses. Significance:  $\chi^2_{(df=4)}=131.040, p<0.001$ , Medium Strength of Association ( $T=0.067$ )

Generated by CivicScience ® on Jan 5, 2018 at 09:14:29 EST

**And as we're freezing our faces off all over the East Coast, what would be more appropriate than some random weather stats?**

- 67% of people admit to regularly complaining about the weather
- 28% of pet owners dress their pets for cold weather
- 35% of people don't like to eat outside, even when the weather is warm
- 53% of people typically trust the weather forecast – 43% don't
- 42% of people think snow is “white” – 58% think it's “clear and colorless”
- 84% of adults remember eating snow as a kid

Hell, I just ate snow yesterday. And it was white.

Hoping you're well (and warm).

**JD**



## Trump Turns Advertising Upside Down & Airbnb Plateaus (1/20/2018)

Man, did I get some wild replies to my request for research ideas last week. People want to know about everything from in-laws to first kisses to whether people wash their hands after they go to the bathroom. Real highbrow stuff.

Some of you asked for free market research for your companies. Nice try.

There were multiple ideas around things like cryptocurrency, daily fantasy sports, and smart home technology. I'll get to as much of it as I can eventually. Thanks for the suggestions.

For now, you'll be happy (or disturbed) to know that 60% of people "always" wash their hands after going to the bathroom. 29% do it "more often than not" and 11% "rarely or never" do it. Women are much more likely than men, Gen Xers do it the most, and people without kids do it the least. So, basically, the cleanest hand you will shake today is a mom's.

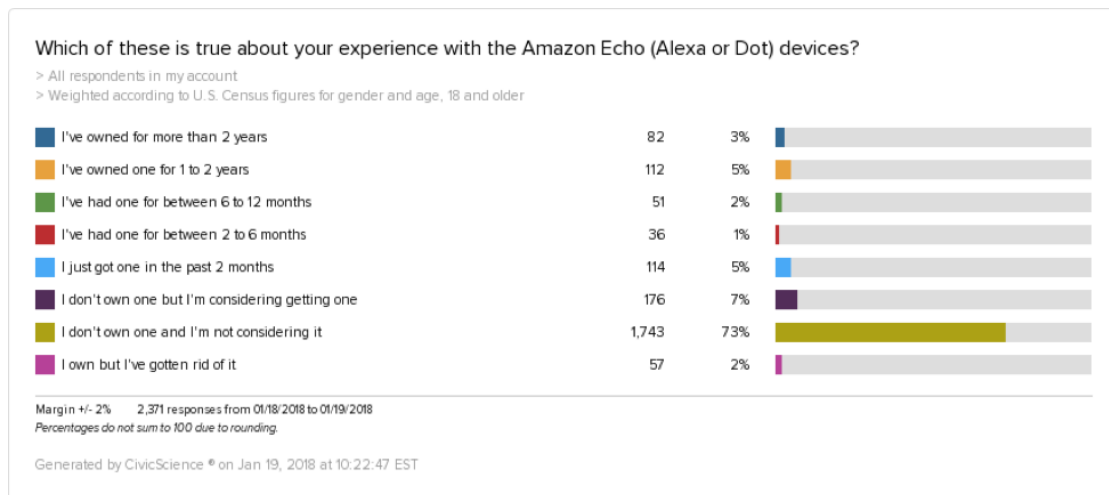
Otherwise, here are some of the cool things we're seeing right now:

**Donald Trump is fundamentally changing the advertising landscape.** I told you last week about the research I was doing – how we've seen an incredible spike in readership of political blogs and websites, even long after the election. Not only are people obsessed with today's political theater but they're seeking out niche, non-traditional outlets that affirm and even cater to their existing beliefs. It's stealing eyeballs away from the NFL (but not more than other types of TV), tightening the noose around traditional newspapers, and forcing advertisers to either take sides or lose customer loyalty. [This is a fairly long read](#) (about 1400 words) – so fill up your coffee first – but it's important. Expect me to expound on this in the weeks to come.

**Sales of Amazon Echo must have crushed it over the holidays.** See for yourself below. Before the heart of the 2017 holiday season, Echo ownership (Alexa or Dot) sat at around 11% of the U.S. adult population, with 8% having owned one of the devices for a year or more. But fix your gaze on the little blue box. 5% of U.S. consumers claim to have purchased/received an Echo device in just the past two months. That's 45% growth.

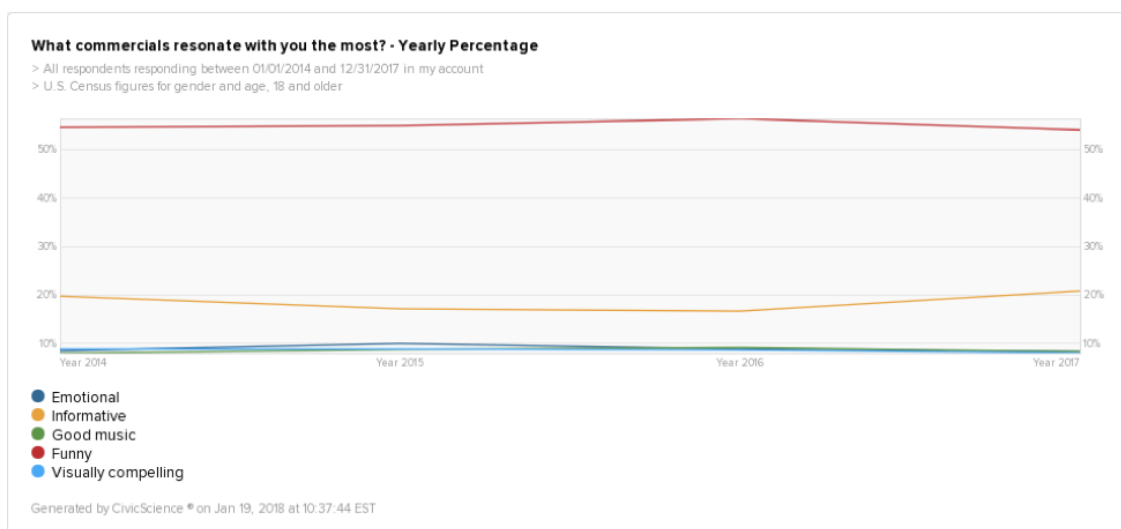


Staggering. One sour note for Bezos & Crew: 75% of consumers say they've either ditched their Echo device or have no intention of ever buying one. Amazon has some work to do if Echo is to become truly mainstream.



**Conversely, Airbnb seems to have hit a plateau.** I'm working on research about an uncannily-consistent "Tech Adopter Ceiling" and there actually appear to be two: One at around 10% of the population (people who will try anything) and one at 25% (the 10% of early adopters plus 15% who are early followers). The Amazon Echo has vaulted through that first barrier but looks to be in danger of hitting the second. Airbnb, seems to be mired short of the lower ceiling with little signs of improvement. We've [seen it in our data](#) for almost a year. [Morgan Stanley](#) confirmed it in November. Maybe they need funnier ads...

**Funny commercials are the boss, while informative ones are on the rise.** This chart probably won't shock anyone. People love funny commercials – more than all other kinds combined. But it's interesting to note that "informative" ads rose in popularity from 17% to 21% in 2017. Maybe in an era of fake news, some people are clamoring for more data.



**It's definitely NOT funny to put kids wearing racially-offensive sweatshirts in your ads.** Do I really need to tell you that? Because somebody should have told H&M. After their inexplicable decision to feature an African-American kid in a dubiously-embossed hoodie, [H&M's brand favorability](#) in our tracking data fell 25% almost overnight and hasn't rebounded. Retail is tough enough right now. Don't make it harder on yourself by being stupid.

**Laundry detergent pods are pretty cool, so long as you don't eat them.** One in five U.S. consumers have moved away from traditional laundry detergent toward more hip and trendy pods. Share is rising fastest among Millennials – at least those who actually wash their own laundry – 25% of whom use pods. Why did we think to look at these numbers this week? Because kids daring each other to eat laundry pods is [apparently a thing now](#). Talk about a conversation I never expected to have with my daughters...

### **Random (Handy) Stats of the Week**

Searching our question database for “hands” to find the hand-washing data led me to these gems:

- 85% of people write right-handed, 11% left-handed, and 5% can write with both;
- 66% of smartphone owners type with one hand, 34% type with both;
- 75% of people prefer paper towels in a public restroom, 21% prefer hand dryers;
- 41% of people wash their dishes by hand;
- 29% of people believe hand sanitizer is bad for you;
- 62% of couples hold hands in public.

That was a lot more than usual this week. Thanks for reading this far.

Hoping you're well.

**JD**

## The Resurgence of Local News (2/3/2018)

Awesome banter from many of you after last week's email. I even fell into a couple wagers over the future of Amazon Alexa and macro-economic trends. I could be up two cases of wine by the end of the year.

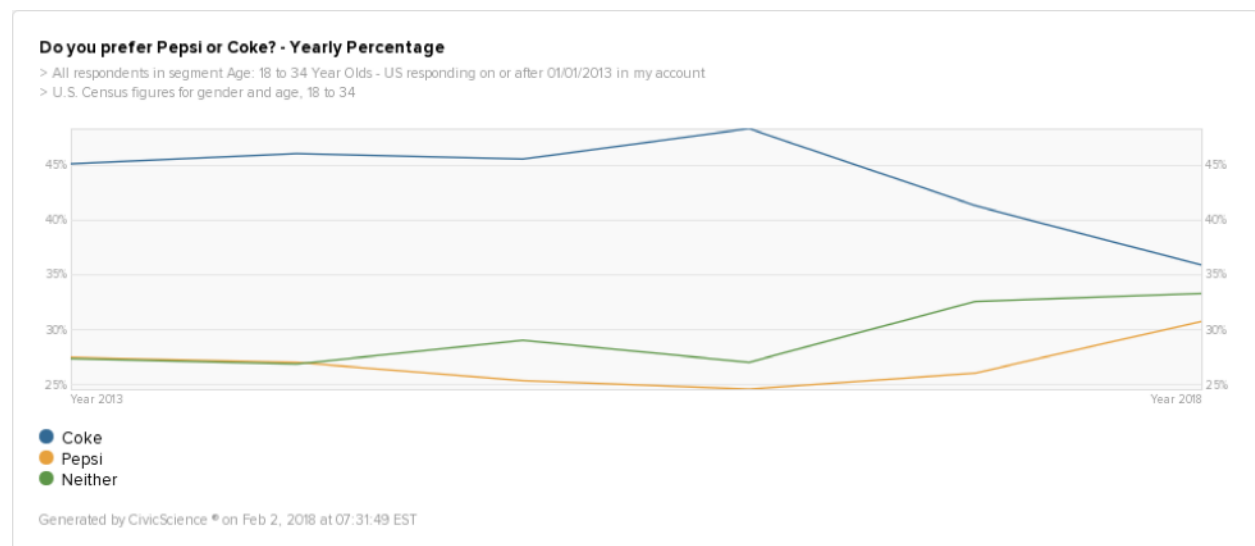
Anyway, keep your comments and insights coming. It's my favorite part of writing this thing.

Here's what we're seeing this week:

**Promoting local news content on Facebook had to be one of the easiest decisions Mark Zuckerberg ever made.** With all of the attention national broadcast and cable news outlets receive – not to mention the HuffPo's and Drudge Reports of the world – it's easy to forget that people prefer local news over all others. Why? Because they trust local news. And in our current crazy world, that matters more than ever. [The numbers prove it.](#)

**Walmart, meanwhile, is bigger than the news.** Following a couple weeks of up and down headlines about Walmart raising its employees' wages, then closing 10% of its Sam's Club locations and slashing 1,000 corporate jobs, [sentiment about the company](#) hasn't budged an inch. It's worth noting that the bad news was much more widely known than the wage hike. If you ever doubt how far-reaching Walmart is, know that a whopping 88% of consumers were aware of one news story or another. Crazy.

**The good news for Coke is that it's still more popular than Pepsi among Millennials.** The bad news is...um...well...Yikes!



### **Cutting all that caffeine must be helping those Millennials get more sleep.**

Piggybacking on some national news last week that Americans are sleeping more than they did a few years ago, we dug a bit deeper into our data to see [who was catching more Z's](#). And yes, it was our favorite avocado-toast-loving Millennials. My fellow Gen Xers are sleeping more too, by the way. But that's just because we're exhausted.

**Every Dick's Sporting Goods store should have a Panera next door.** We track a coefficient in our database that measures the “strength of association” between the thousands of questions we ask to find things that are surprisingly or overwhelmingly correlated. A big one we discovered this week was the off-the-charts relationship between how much someone ‘loves’ Panera and how much they ‘love’ DSG. How correlated are they? Well, I could tell you that the Tschuprow's T coefficient is .233. But then you would tell me to shut up and stop being such a dork. So just trust me. It's a lot.

### **Your Random Stat of the Week**

25% of adults say that their teenage self wouldn't like who they've become as adults. That's sad. What's sadder is that [it's almost entirely correlated](#) with how much money they've made in their adult lives. My teenage self would definitely be ashamed of me. For liking tofu. And kale. And Broadway cast albums.

Hoping you're well.

**JD**



## Only When I'm Drunk (2/10/2018)

We have an ongoing scavenger hunt at CivicScience to find poll questions in our database that *should* have “Only When I’m Drunk” as an answer option. For example:

### ***How frequently do you use ride-sharing services like Uber or Lyft?***

- Once a week or more
- Once a month or so
- Rarely if ever
- Only when I’m drunk

Got it? Anyway, it makes for a lot of laughs, especially when you’re spending hours sifting through endless lines of data. Here are some of my favorites from over the years:

### ***How often do you purchase infomercial products on TV or online?***

It’s the only reason I have three salad spinners.

### ***How often do you smoke cigarettes?***

Ugh. Guilty.

### ***How much do you like Totino’s Pizza Rolls?***

Always a good way to add to your hangover self-loathing.

### ***How much do you like to drink Budweiser?***

I haven’t been that drunk since college.

### ***Can you sing?***

Dunks: Keeping karaoke in business since the Prohibition.

### ***Do you use your work email for personal email too?***

Oops.

### ***How happy are you today?***

OK. Now that’s just sad.

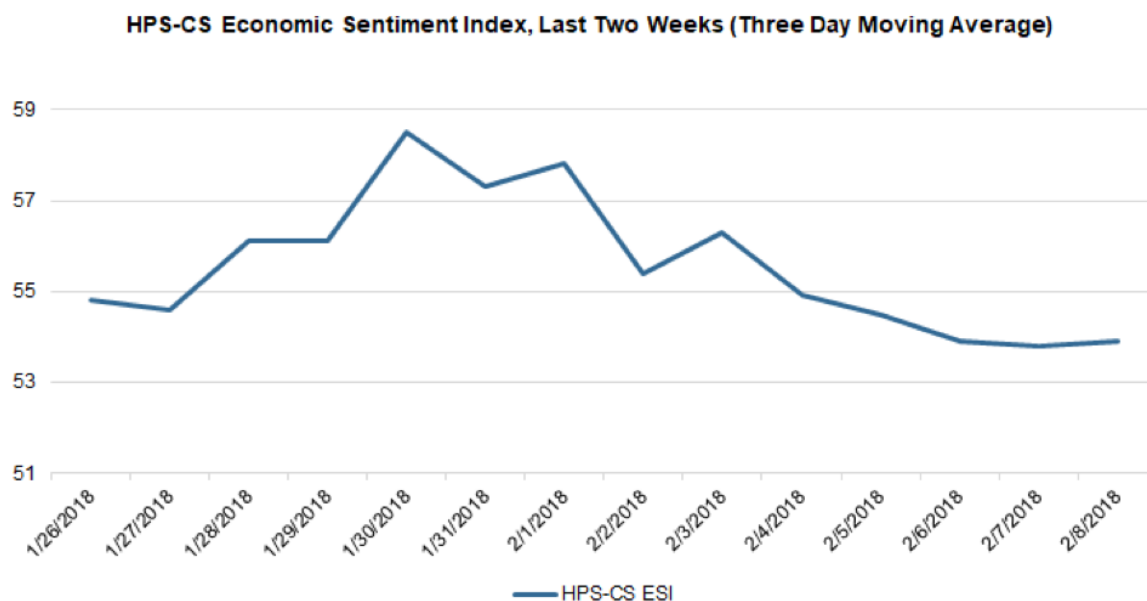
And my personal favorite...

## ***How often do you use money transfer services like Western Union, MoneyGram, or others?***

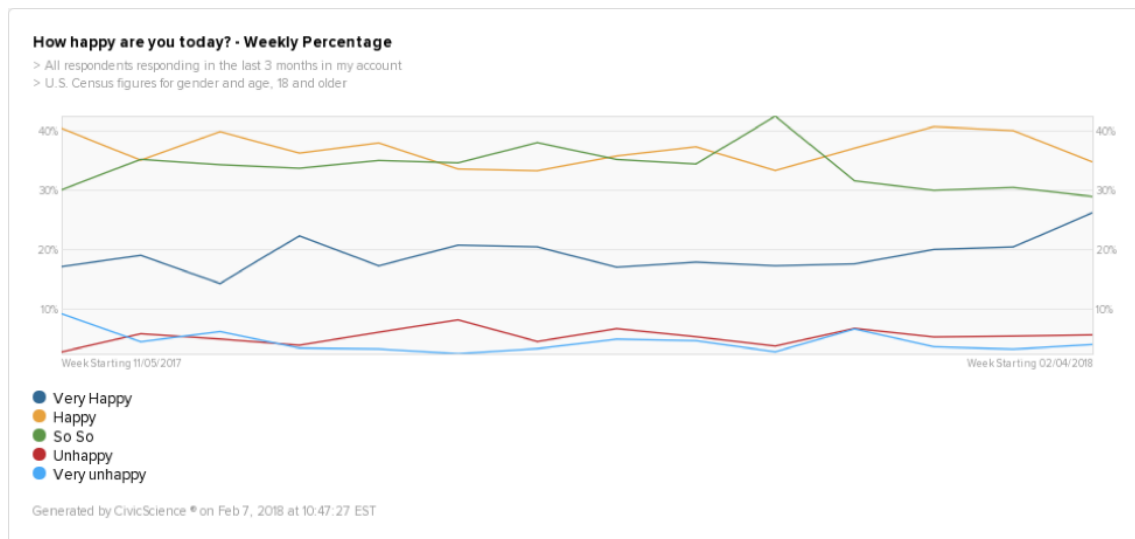
Ah, Vegas.

Here are a few less-intoxicating things we're seeing this week:

**Consumer confidence keeps plugging along, even after the stock market fiasco on Monday.** We released [our latest Economic Sentiment Index](#) on Monday – just as the proverbial shit was hitting the fan. Through the end of last week, the index had reached another five-year high, buoyed by people's enthusiasm for their personal finances. One of the advantages of our methodology, compared to the old-school U. Michigan and Conference Board indices, is that we're tracking everything on a real-time basis. And, while we indeed saw a dip at the beginning of the week, things leveled off by Wednesday.



**Maybe America's hatred for the New England Patriots\* trumped our fears of a market sell-off.** One thing that may have staved off a precipitous decline in U.S. sentiment this week was the Eagles' thrilling victory over Belichick and Brady on Sunday. You can see in the chart below how our national happiness tracker jumped on Monday morning. The percentage of U.S. adults who identified as "Very Happy" (the dark blue line) leapt nearly 7 points in the 24 hours following the Super Bowl. "Very Happy" respondents in the Philadelphia metro area climbed from 15% in the weeks leading up to the game to 40% in the days since. Most surprising to me is that 15% of Philadelphians were actually happy in the first place.



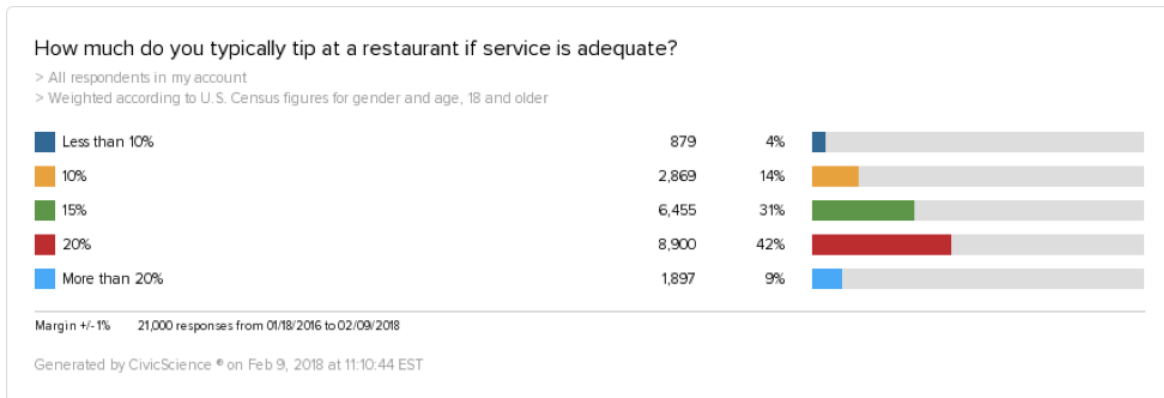
**Audience interest of younger viewers for the Winter Olympics is pretty much insane.** When compared to our data leading up to the 2014 games in Sochi, we're seeing a significant increase in likely [viewers for the games in Pyeongchang](#). 52% of Americans say they intend to follow the Games at least "somewhat closely," up from 41% prior to the 2014 Winter Olympics. But the headline number is the growth we're seeing among Millennials and Gen Z. In 2014, just 41% of people under 35 expected to follow the Games in Sochi. This time around, that number rocketed to 59%. If the ratings play out that way, it could be an absolute banner event for NBC.

**And once the Olympics are over, get ready for the coming renaissance of local media.** I know I started beating the drum on this [last week](#). Get used to it. Whether Facebook catapults local media back into public favor or whether they're just capitalizing on a trend that already started, we should see a resurgence of traffic to local publishers – and, as our data shows, [national advertisers would be smart](#) to follow them. Between safe brand alignment, high-value, loyal readers (particularly women), and improving Martech tools for content personalization, a trend toward local publishers could be as beneficial to advertisers as it is to the outlets themselves.

**Doritos may need to do a little clean-up with those local-media-loving female consumers.** In a perfect storm of unfortunate misunderstanding, hyper-sensitive gender issues, and rampant internet viral-ness, Doritos was dinged this week for rumors of a ladies-only tortilla chip. [Favorability toward the Doritos brand](#) dropped nearly 10 full percentage points this week. Given that this was just a case of misinformation, hopefully the bounce-back is quick.

## Some Random Stats (or Tips) for the Week

- 19% of people tip the same percentage every time, no matter what
- 33% of people tip on a restaurant takeout order
- 37% of people always tip at a coffee shop – 37% never tip at a coffee shop
- 38% of Uber riders tip their driver
- 17% of people tip their garbage collectors around the holidays
- 28% tip people who deliver large household items to their home
- See below: If you're in the 18% who tip restaurant servers less than 15%, you're a jerk.



And last but not least:



Missing answer option: "It depends on how drunk I got the night before"

Hoping you're well.

JD





## Saying Goodbye to the Killjoys & Teetotalers (2/17/2018)

I may have learned more from my write-up last week than any of you did.

I learned that many, many of you want more humor – particularly drinking-related humor – in my prose. I had more flattering feedback last weekend than I’ve had in any full quarter since I started writing this thing.

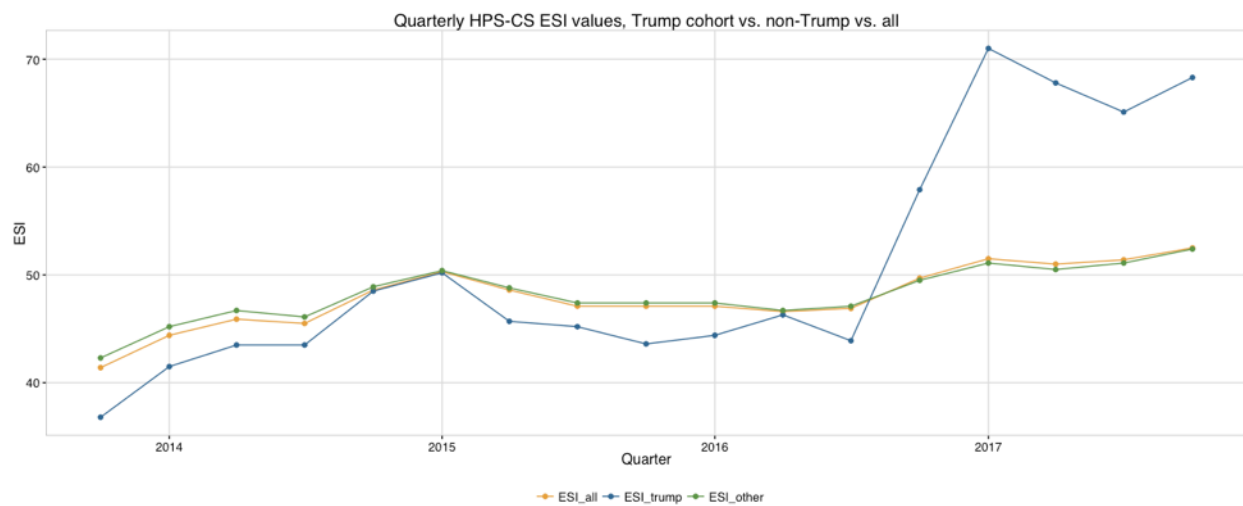
I also learned that a few people don’t want any humor – at least not drinking-related humor – in their Saturday inbox. I had a few uncharacteristic ‘unsubscribes’ – including one very famous member of the media – and more than one unpleasant reply.

And now that we’ve chased off all the killjoys and teetotalers, we can really have some fun.

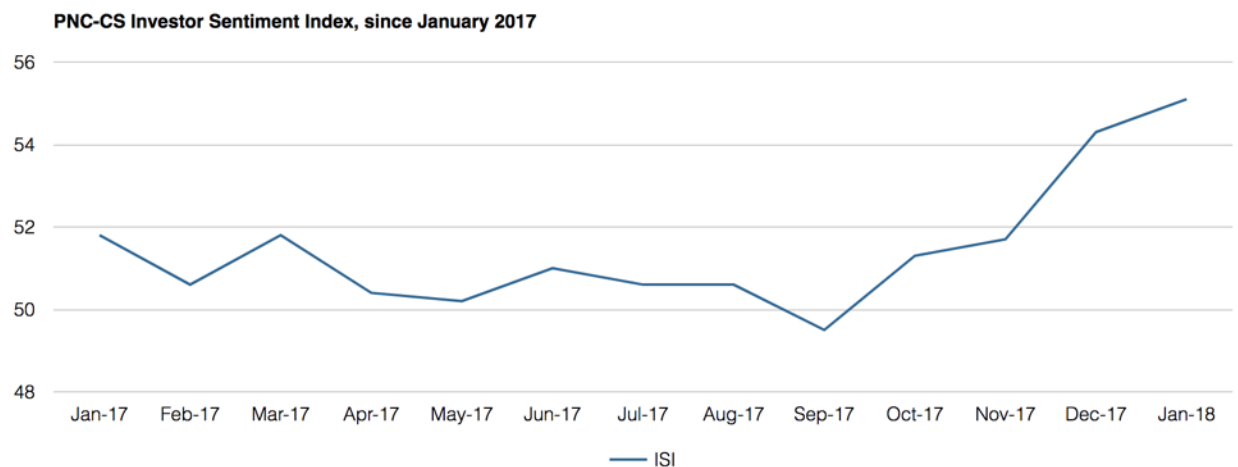
Here’s what we’re seeing this week:

**Everyone needs to calm the hell down about Snapchat vs. Facebook.** My head almost exploded from all the “Snapchat’s stealing all the young people from Facebook!” squealing in the biz press this week. Yes, Snapchat is growing, which we could have told you months ago (if our paying clients didn’t get crabby about us publishing secrets like that before earnings calls). But the idea that Facebook is bleeding to death is absurd. Head-to-head, Facebook + Instagram’s story about Gen Z is [still number one](#) at the box office, by a lot. Everybody jGen Zt chill.

**It’s not just Trumpies who are driving the meteoric climb in consumer confidence.** Since I enjoy bragging when we’re right. I have to call myself out when I’m wrong. I thought the continued rise of U.S. economic sentiment was being pushed by Trump voters, who were particularly sour before DJT took office. Indeed, confidence among the Trump Cohort (notably white, rural/suburban, older male Republicans) almost jumped off the chart last January. But sentiment among non-Trumpies (the green line) has climbed steadily too. This tells us two things: 1) Economic warm-and-fuzzies are widespread and 2) While the Trump cohort isn’t large enough to profoundly impact U.S. macro indicators, they’re certainly large enough to swing an election.

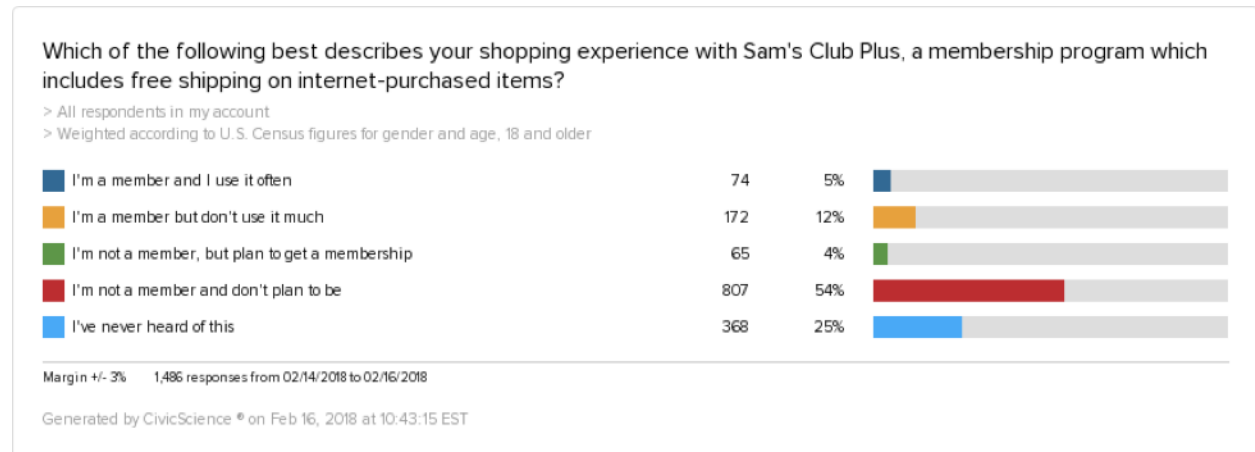


**In related news, investor confidence improved yet again.** Our monthly PNC-CivicScience Investor Sentiment Index came out this week. If you geek out about this stuff, you can see the numbers behind the numbers [here](#).

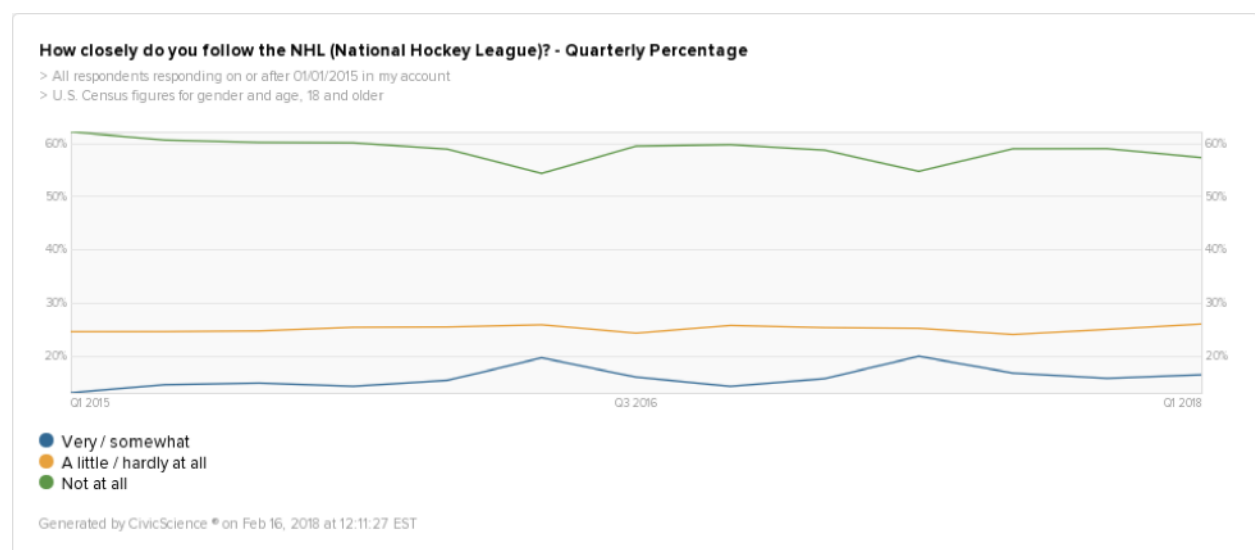


**Jeff Bezos probably isn't popping Xanax over Sam's Club's free online shipping initiative.** You may have seen the announcement from Bentonville this week that Sam's Club would begin offering free shipping to members of its "Plus" program. We ran some same-day numbers after the announcement and the early returns aren't mind-blowing. Perhaps the new feature will get more current Sam's Club members from migrating to Amazon Prime but only 4% of U.S. adults say they are considering signing up for the program. We'll keep an eye on whether those numbers move.

**But Sam's Club is to Amazon as Amazon Prime Video is to Netflix.** We [published the first](#) of a series of studies we're doing (most of which will be for clients only...sorry) about the streaming content marketplace, this time looking at the overlap among users of the four biggest services (Amazon Prime Video, HBO GO, Hulu, and Netflix). Not only is Netflix the most popular by a mile but their number of unduplicated users (ie. people who subscribe to Netflix only) is five times greater than that of Amazon. We subscribe to 3 in our house and I still can't find Better Off Dead.



**The NHL is what it is.** It's easy to love hockey when you're from Pittsburgh or hate Washington. But the rest of the country, at large, just can't seem to warm up to it. While the NFL is hemorrhaging and the NBA is booming, hockey simply plugs along with a predictable and loyal fan base. With the occasional spike in fan interest during playoff season, the consistency in fan interest over time is uncanny.



## Your Random Post-Valentine's Day Stat of the Week

### Should you talk politics on a first date?

> All respondents in my account

> Weighted according to U.S. Census figures for gender and age, 18 and older



Margin +/- 4%    2,246 responses from 02/13/2018 to 02/16/2018

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Just don't do it. Really.

Hoping you're well.

JD



## My Band (2/24/2018)

Did I ever tell you I sing in a band? A pretty good one, actually. We cover mostly hard rock and alternative music like [this](#) or [this](#). It's sort of an alter-ego thing (and definitely-not-a-midlife-crisis-so-shut-up thing).

Anyway, fifteen years ago, we named the band Moscow Mule, when the drink was unknown by all but the rarest of bartenders. For a decade, hardly anyone knew the origin of our name. And then...

Now you can find a Moscow Mule – or several bastardizations – everywhere, even Applebee's. You can buy knock-off copper mugs at Marshalls. When people hear the name, they assume we hijacked a bandwagon. Cocktail snobs roll their eyes at us.

Why do I bring this up? Well, because it pisses me off. We might as well have called the band "Outside the Box" or "Big Data."

But also, because it's almost impossible to know if a nascent, obscure thing today will become the next-big-thing of tomorrow. Social media and tribalism have truncated the adoption curve – products or media can go from niche to cliché (you pronounced those words the same in your head, didn't you?), almost overnight. You have to be agile or live with the consequences.

Expect that to be a recurring theme from us in the coming months. And let me know if you have any ideas for new band names.

Here's what we're seeing this week:

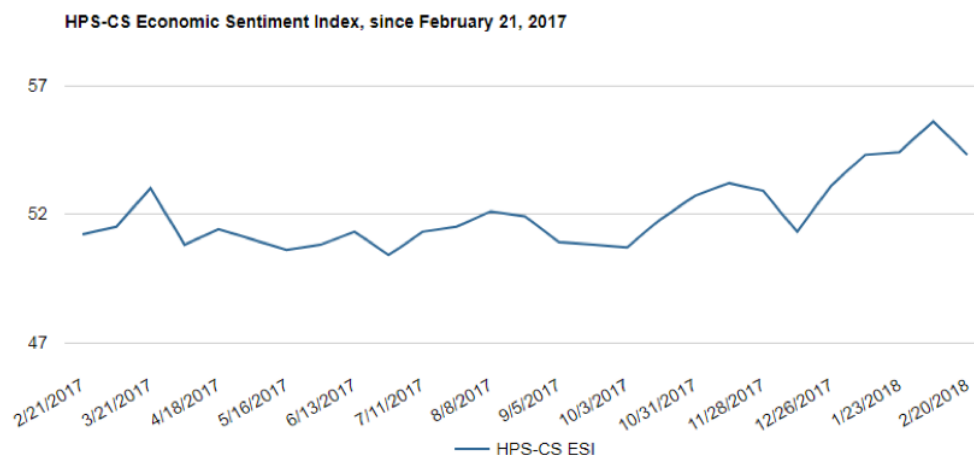
### **Fox News is jumping into the over-the-top streaming game faster than I**

**would.** You may have seen that Rupert Murdoch & Company [announced](#) the upcoming launch of a streaming-only service for what they call "Superfans." We found it a little head-scratching because, [according to our data](#), Fox News' viewers are the least likely of all networks to stream TV programming at all. If anybody should be plotting an OTT move, it's CNN, and even that might be premature.

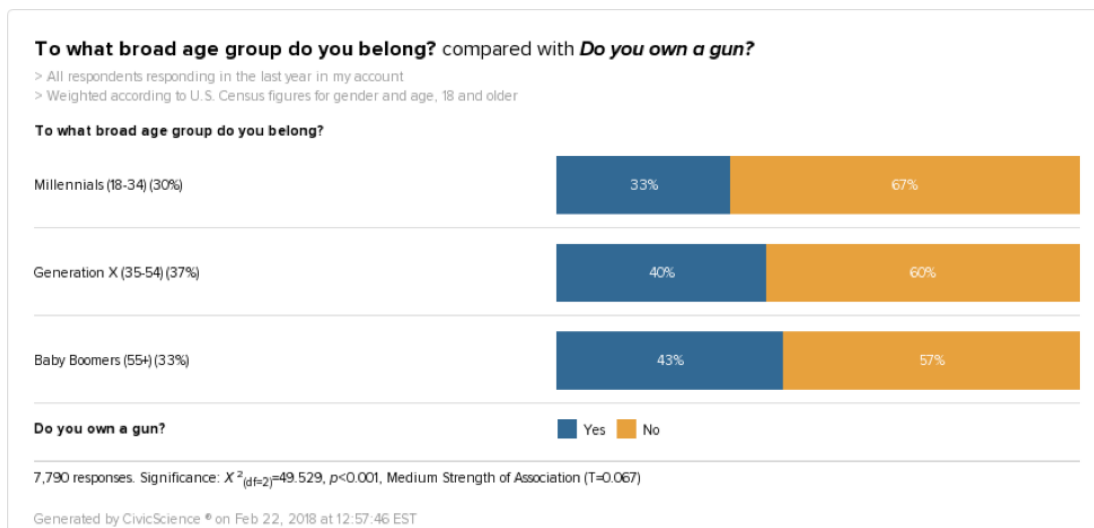
**The profile of early VR adopters is somewhat surprising.** Count me among the Luddites who thought virtual reality would be the final chapter of our increasingly-

introverted, glued-to-a-screen, never-leave-the-house economy. It still might. But when we studied [the personality types of current VR owners](#), we actually found them to be much more extroverted than average. It will be interesting to see if that holds true as the technology proliferates.

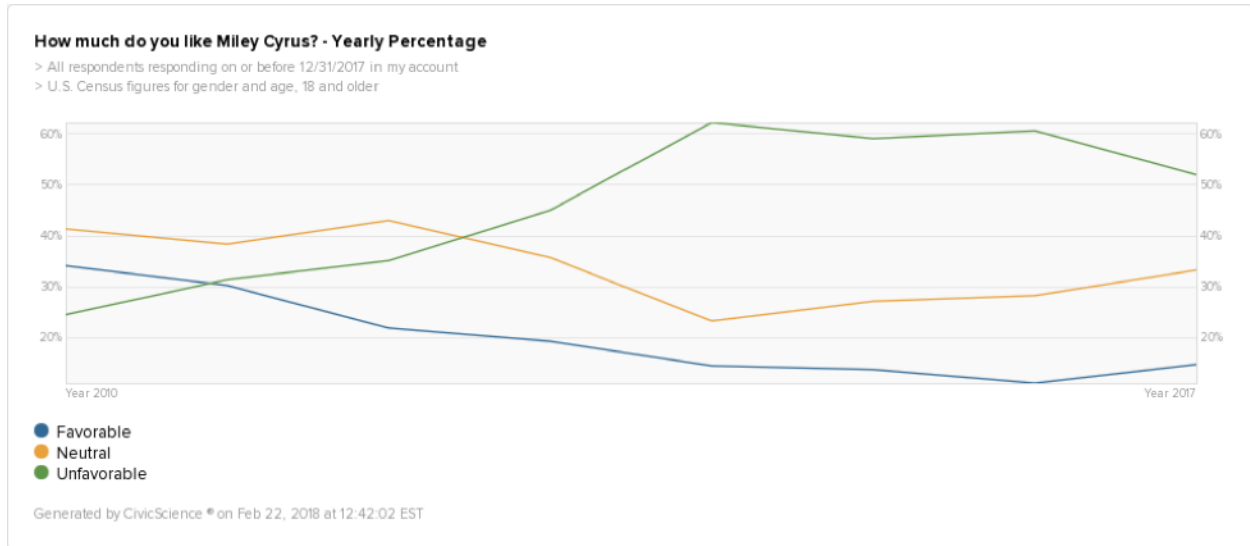
**Consumer confidence has fallen for the very first time this year.** Our Economic Sentiment Index had [its first blemish](#) since the week before Christmas. The overall number is still well above its watermark from a year ago but declining confidence in the U.S. economy and the housing market were a clear drag over the past two weeks. This may simply prove to be a one-time correction after two solid months of rose-colored glasses. Stay tuned.



**Like it or not, we probably will have significant changes in gun laws eventually.** You know I don't do divisive politics here, so just chill. But, while gun ownership in the U.S. has steadily declined (by the number of owners, not the number of guns sold), the drop has been particularly swift among Millennials. Today, just under 1/3rd of Millennials own a gun, a 10% drop from Baby Boomers. Unless that changes, the political tides will most certainly shift one day as a result – perhaps sooner than later.



**The popularity of Miley Cyrus has taken quite a ride.** How's that for a non sequitur? Yeah, I don't know why these data caught my eye either. But after a wrecking ball of declining favorability post-Hannah Montana, Miley started to show signs of a brand rebuild in 2017. We don't see that kind of rebound in our celebrity numbers very often.



## Even More Random Stats of the Week

From our most-responded-to [questions of the week](#):

- 59% of gym-goers believe the news should never be on at the gym (Amen);
- 32% of pet owners let their dogs kiss them on the mouth (Gross);
- 12% of married people invited an ex to their wedding (Nope);

So there you have it.

Hoping you're well.

JD



## 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.



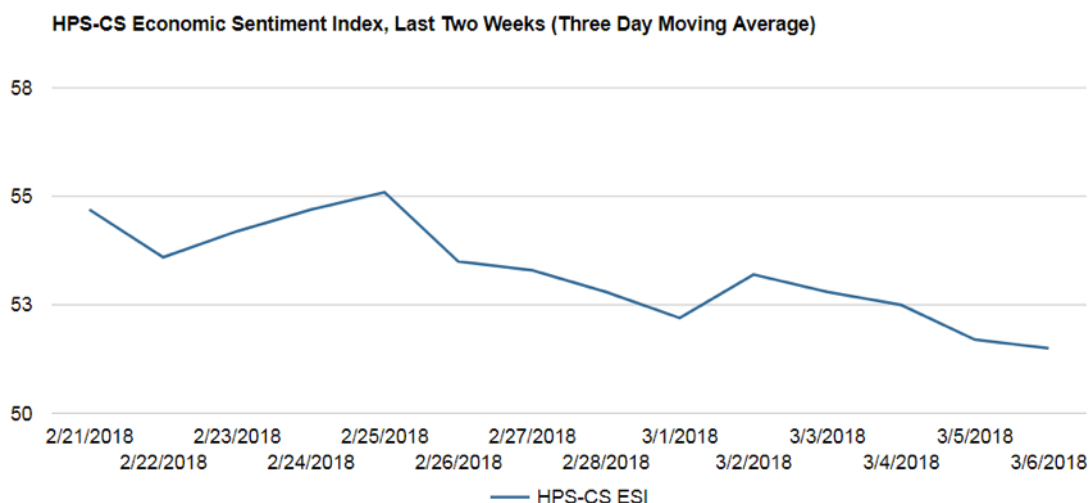
I know, I know. We should be ashamed of ourselves. What kind of sick, twisted people do that to a close friend? Will we ever fess up? How will we explain ourselves when Rochester eventually dies and Ben flies all the way to Savannah for his funeral?

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.

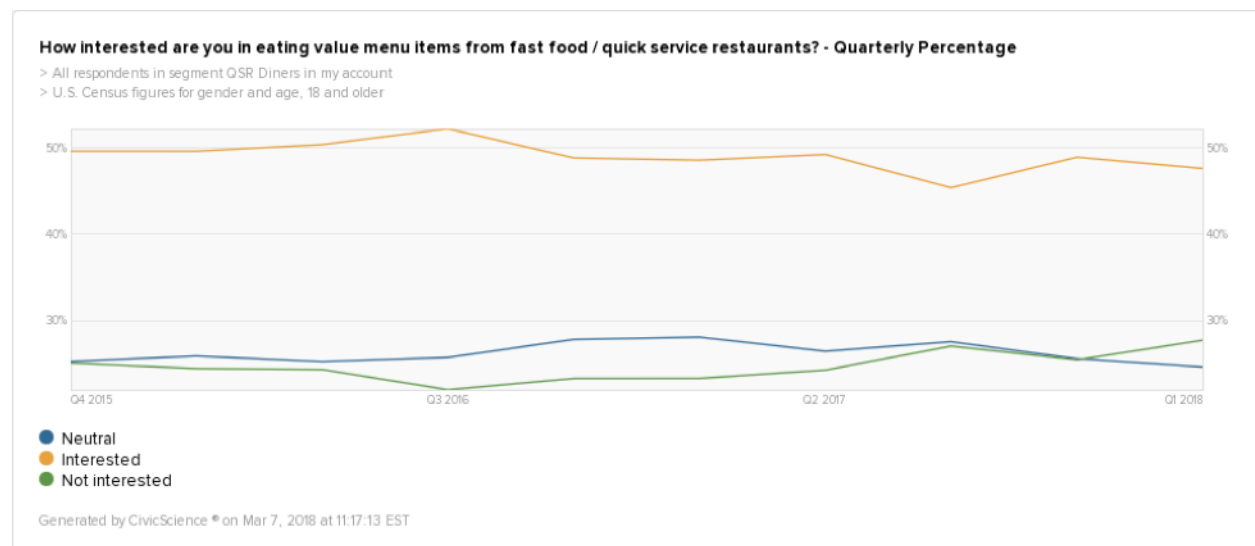
In the meantime, here are a few real things we're seeing right now:

**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 macro-economic forces so closely, look no further than the QSR industry.** One of the dozens of questions we track about

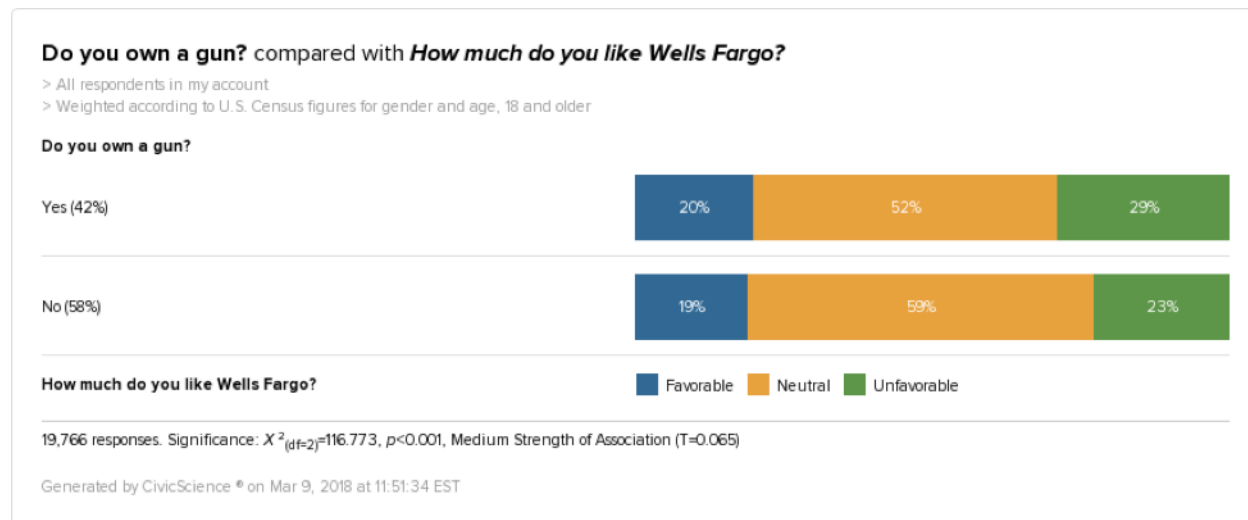
restaurant dining enquires about people's attitudes toward fast food value menu offerings. Look at the chart below and notice how attitudes toward value menu items among frequent QSR diners have shifted, coinciding with the rise in consumer confidence we've seen since the 2016 election. Value menus are 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.



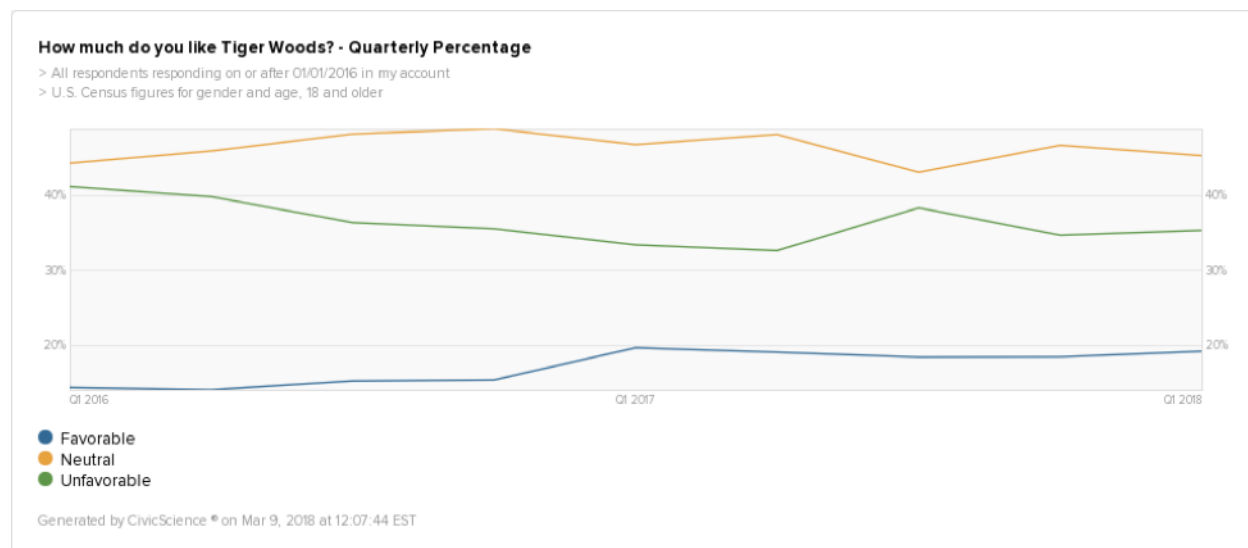
**One thing that isn't changing – because of economic sentiment or otherwise – is the pace of mobile payment adoption in the U.S.** Numerous [experts have pontificated](#) on the disparity between the growth of mobile payments in places like China and underwhelming numbers in the U.S. Our data tell us 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.

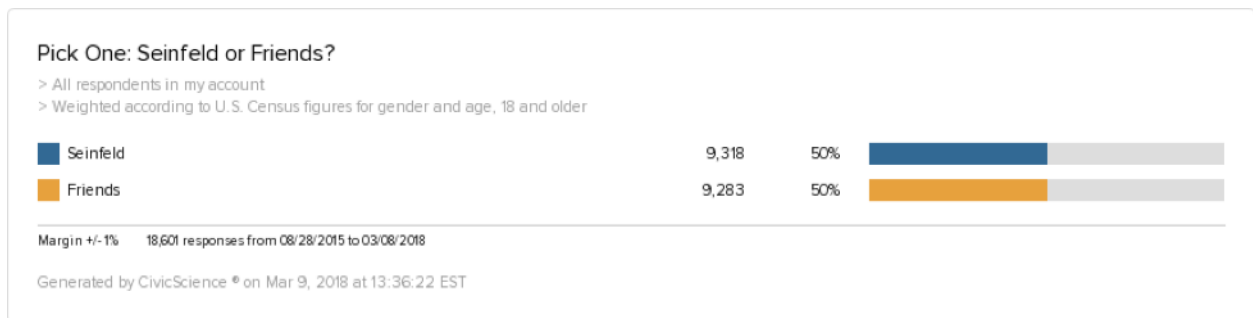


**The Tiger Woods Show is heating up.** Count me among the sports fans who are giddy over the apparent return of Tiger Woods. Whether (or when) he wins, it will be interesting to see if Tiger can reclaim his perch in public opinion. After bottoming out with the whole crashing-his-SUV-into-his-house-because-his 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

## It's Always the Economy, Stupid (3/17/2018)

The good news about [my unorthodox email last week](#) is that it shattered all of our previous records for all those analytics marketing people love to track.

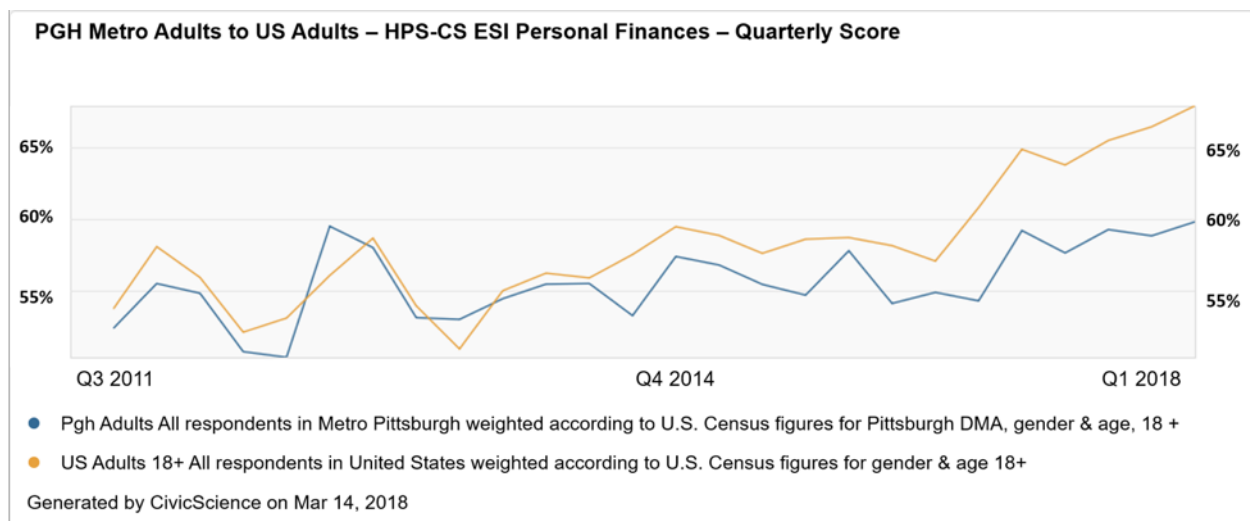
The bad news is, I have nothing to follow it up with. That was my best story. I jumped the shark, emptied my wallet, whatever you want to call it. I can't beat it.

So, I'm not gonna even try to amuse you this week, sorry. I need to lower the bar back to where it started.

(Incidentally, it looks like tons of you regularly forward this to lots of other people, which is cool. But if you'd rather me just add them to the list, I'm happy to make your life easier).

Here's what we're seeing right now:

**Stop confusing widespread trends for universal ones.** I hinted last week at a potential upset in the 18th PA congressional district election – I had a card up my sleeve I didn't show you. Conventional wisdom would have said that our current 18-month wave of improving economic sentiment would be a harbinger of good things for anyone in the Trump camp. But that presumes everyone is benefiting from the economy to the same degree. When we looked at our confidence indicators for the Pittsburgh region, [we saw cracks](#) in the ship that weren't evident from afar. Ironically, [we warned of a similar phenomenon in October 2016](#), among a group of people who formed the nucleus of Trump's voter cohort – and look what happened. Stop being so surprised. Always check under the hood.



**Investor confidence didn't have a great month either.** Our PNC-CivicScience Investor Sentiment Index had its [steepest one-month drop](#) since we started tracking it. It's too soon to say the joy ride is over, but the car does seem to be slowing down for the time being.

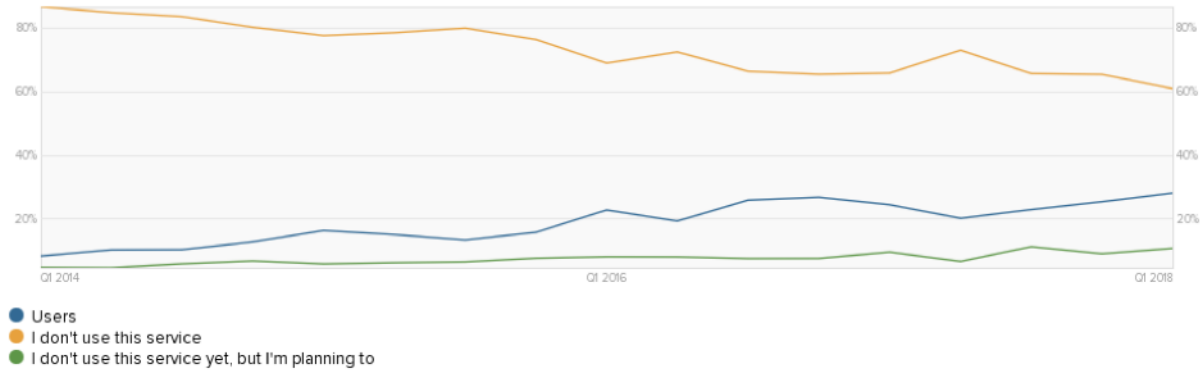
**People with graduate degrees have less debt than college grads.** [This article](#) from Danielle on our team is chock-full of depressing stuff for yours truly and my Gen X cohort. Gen Xers have 6x more debt than our parents did at the same age – perhaps because we're paying for their sins. We have higher credit card debt than Millennials and Boomers too. Who has the highest chance of being in debt? Gen Xers like me who have a bachelor's degree but nothing further. Sigh.

**In related news, Gen Xers are too annoyed with Millennials to call them for pizza.** Huh? Bear with me. [Analysis we did this week](#) found that, despite a bunch of gimmicks like emoji-ordering or pizza-beckoning sneakers, people still prefer old-fashioned voice calling to order pizza. Surprisingly – at least until you think about it – Gen Xers were much more likely than their younger counterparts to use modern techniques like app or web ordering. Maybe we're just too crabby about all of our Baby Boomer-inherited debt to talk to some happy-go-lucky, debt-free Millennial on the phone. Just bring us our damn pizza and leave us alone.

**Amazon Prime Video is on the rise again.** I almost made it a whole week without writing about Amazon. Then Christmas-in-March happened for data nerds. Amazon did something they never do and allowed some [internal documents](#) to see the light of day – which estimated Prime Video had 26MM customers in early 2017. We [wrote in July 2017](#) about what appeared to be a slowing of Prime Video users based on our trailing one-year data. But then things started to climb (see below). It's hard to reconcile “customer” numbers, which Amazon shared, with “viewer” numbers, which we measure, because we know there are usually multiple adult viewers under one customer account. But, presuming the ratio of customers to viewers held steady, we could guesstimate that the number of Amazon customers grew to something north of 30 million by early 2018.

### How often do you watch Amazon Prime Instant Video? - Quarterly Percentage

> All respondents responding on or before 02/28/2018 in my account  
> U.S. Census figures for gender and age, 18 and older

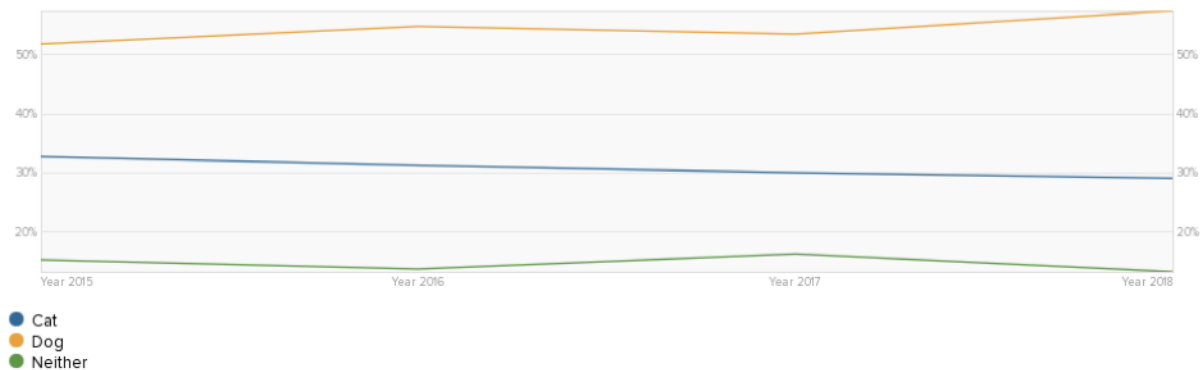


Generated by CivicScience® on Mar 16, 2018 at 12:47:03 EDT

**Dogs are on the rise too.** We bought the first family dog for our daughters last weekend – he's an Australian Shepherd, named Wilson. Ok, I'll be honest. I really bought myself a dog after 14 years of being the only boy in the house. And, it turns out, dogs have slowly gained in popularity over the past few years, while cats slowly fell out of favor. I can't even begin to say this trend has anything to do with the economy, but wouldn't that be a cool thing to figure out? In the meantime, I'll try to figure out how to get Wilson to stop chewing on my phone.

### Are you a cat or dog person? - Yearly Percentage

> All respondents responding on or after 01/01/2015 in my account  
> U.S. Census figures for gender and age, 18 and older



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## Random Stats of the Week

From our [most-engaging questions](#) of the week:

- 10% of people presently in a relationship say that their current partner is not “the one”;
- 73% of people believe it’s “unacceptable” to talk on the phone while in a checkout line – particularly people in the Midwest;
- 30% of people can’t stand kale, especially people who drink Coke;
- 49% of people claim they never gossip, 51% readily admit that they do.

I’m guessing some large portion of that 49% is full of it.

Hoping you’re well.

JD





## Bob Lefsetz is My Hero (4/7/2018)

Hi there. Glad to be back.

If you're a regular reader of this email, you've probably picked up on [the man-crush](#) I have on Bob Lefsetz. He's a music industry legend, a prodigious wordsmith, and ferreter of truth. These are a few of my favorite things.

So, I had quite the bout of Impostor Syndrome when Bob invited me to join his podcast in Santa Monica a few weeks ago. I wanted to interview HIM. I was dying to know about the origins of his inimitable writing style, all the music history he's witnessed, or what it's like to have Taylor Swift [write a song about you](#). Fortunately, I got to do that off-air.

On-air, we talked about a lot of the topics you read about in this email every week, the big trends changing the world before our eyes. We talked about other important stuff too, like the sure-fire way to beat Millennials at Rock, Paper, Scissors, why Gary Busey fans love Kia cars so much, or why CPAP machines shouldn't be sold to sleep apnea patients – but to their spouses.

There's so much more. [Give it a listen](#) while you're on the treadmill or stuck in traffic.

And if you ever want to experience the full gravity of Bob Lefsetz, get him to print your email address in one of the letters to his army of loyal readers. It felt like my inbox was under assault by Russian bots – but it was awesome.

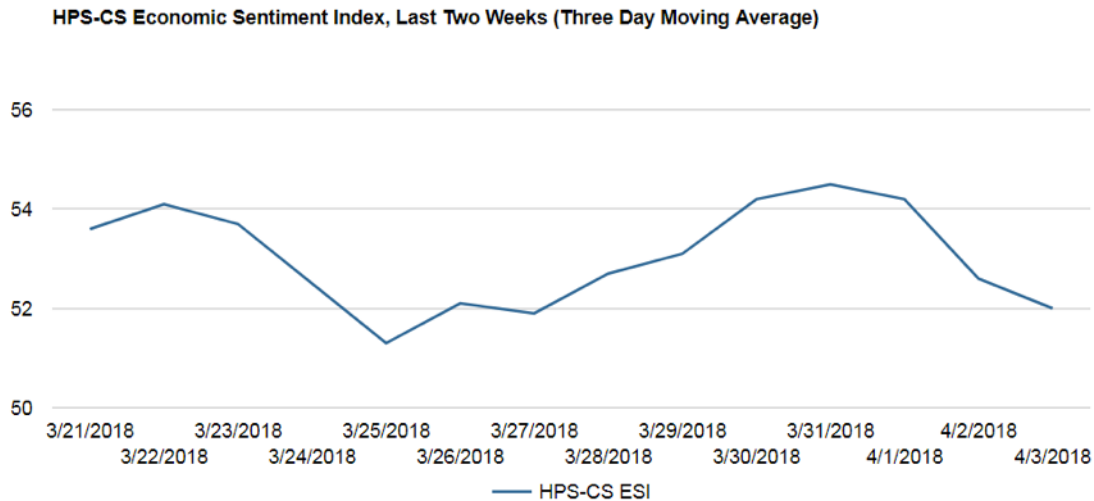
By the way, welcome all of you first-timers. Don't expect to find Bob's gift for storytelling here, or anywhere for that matter. If you want a good feel for what you can expect, check out the archives. Most people would recommend [this one](#) or [this one](#) for starters.

Otherwise, here's what we're seeing right now:

### **Consumer confidence is so volatile it's almost not worth talking**

**about.** We thought we were improving the science of economic sentiment monitoring by publishing a bi-weekly measure, in contrast to the prevailing once-a-month indices. Well, two-week trends are meaningless at the moment. Consumer confidence is fluctuating almost by the day, in reaction (or overreaction, per Cambridge Analytica) to the news cycle. Yes, [our latest two-week reading](#) showed a slight decline, driven by pessimism about the

job market. But you can see below how different a bi-weekly index would look if we had reported it just three days earlier. Crazy times.



**A smart home is a safe home.** I know that sounds like a corny public service announcement. What I meant to say is that we believe [the biggest opportunity for near-term growth](#) in the smart home technology sector is in areas related to home safety and security. Refrigerators that order my groceries for me or voice-activated climate control might sound sexy but those kind of convenience items are still just for the earliest of adopters. One of the biggest things driving today's stay-at-home economy is our desire to feel safe and secure. Products and technologies that deliver on that desire are winning right now.

**I'm not getting the whole Spotify thing.** With the important caveat that our numbers are U.S. only, it's hard for me to slap a 'unicorn' label on Spotify in the wake of its public offering this week. Either this is the most wrong our numbers have ever been (and we're really good at this stuff) or the growth of Spotify in the U.S. has been modest for the better part of three years. Since we started tracking it, Spotify has picked up just about 1% of the U.S. adult population every year, putting its aggregate audience numbers safely below Twitter or Pinterest.

**The unexpected success of the *Roseanne* reboot was driven by politics because everything is.** Even with a slight dip in viewership in its second week, the *Roseanne* revival on ABC continued to shock media pundits with its ratings. Many people have surmised that the audience bonanza was politically-charged, as both the theme of the show and the Donald Trump-Roseanne Barr lovefest were presumably mobilizing the Trump cohort of TV viewers. Well, surmise no more. Our [data showed](#) a nearly 2-to-1 Republican skew among the *Roseanne* audience. Don't be surprised to see more media outlets follow this tribal blueprint. If winning 30% of U.S. adults is good enough to get a President elected, it's certainly good enough to win a ratings time slot.

**Lots of people still drink their tap water.** We get asked all the time by Wall St. types whether we think La Croix is going to bankrupt the soft drink industry (no, it's not). And there's no shortage of bad PR about the bottled water and the plastic chemicals it proliferates. Lost in all of that is [the fact](#) that half of Americans still drink more tap or well water than anything else, particularly people in lower income strata and rural areas. This is true even though only 29% of Americans trust their tap water more than other forms. We need clean drinking water – because people will drink it whether it's clean or not.

### **Random (School) Stats of the Week**

- 60% of people took a bus to school;
- 34% say that Math was their least favorite subject in school, followed by Gym (14%), and Foreign Language (13%);
- 69% of people dissected a frog when they were in school;
- 18% of people got in trouble for violating a dress code;
- 32% of people played an instrument in the school band.

And there you have it.

Hoping you're well.

JD

## The Deepest Email I Ever Wrote (4/14/2018)

Two of the more paradoxical (and thus my favorite) things we've found in our data over the past few years both relate to happiness and its underlying ingredients. They are:

**#1- On average, people who exercise more, eat healthier, travel more, stress less, and sleep longer report higher levels of happiness than people who don't.** I know.

Duh. And, people WITHOUT kids are more likely than people WITH kids to do all those happy-making things. Also, duh. BUT, despite that, when we control for age, gender, and other demographics, we find that parents are much MORE likely than non-parents to report higher levels of happiness. Surprise! I did a [Good Morning America](#) gig about it once and got a deluge of hate mail from people who don't/can't have kids. They thought I was judging them. I wasn't. I just reported the numbers.

**#2- Happiness increases with age.** Yes, teen angst is real. Thirty-somethings are all sorts of stressed out. But [as people get older](#), their level of happiness improves, peaking in their 50s, 60s, and beyond. By then, presumably, we're financially-secure, steeped in perspective, and comfortable in our own skin. Makes sense. Here's the twist: 74% of Gen Xers and 72% of Baby Boomers say they would go back in time, if they could – ostensibly to a point in their lives when they were LESS happy, overall, than they are today. Why?

I've thought a lot about that since my college reunion a few weeks ago. It did feel like going back in time. And I loved it. But it also took me awhile to recover – and I don't just mean the hangover, though that was epic too. The nostalgia was harder to shake.

A friend said to me after that weekend *"I feel like what reunions do is make you all sorts of nostalgic for the things you did and didn't do."* The last two words stuck with me. While I can picture all my best college moments like they happened a minute ago, I seemed to forget all the things I didn't do – or the things I regretted. Subconsciously, I guess they just disappeared.

Maybe that's one of the reasons we get happier with age. Time cements our fondest memories, washes away our regrets, and makes us look past the things we can no longer do – like sleep more, exercise more, or party more – and replaces them with new and better things, like self-assurance, peace of mind...and kids.

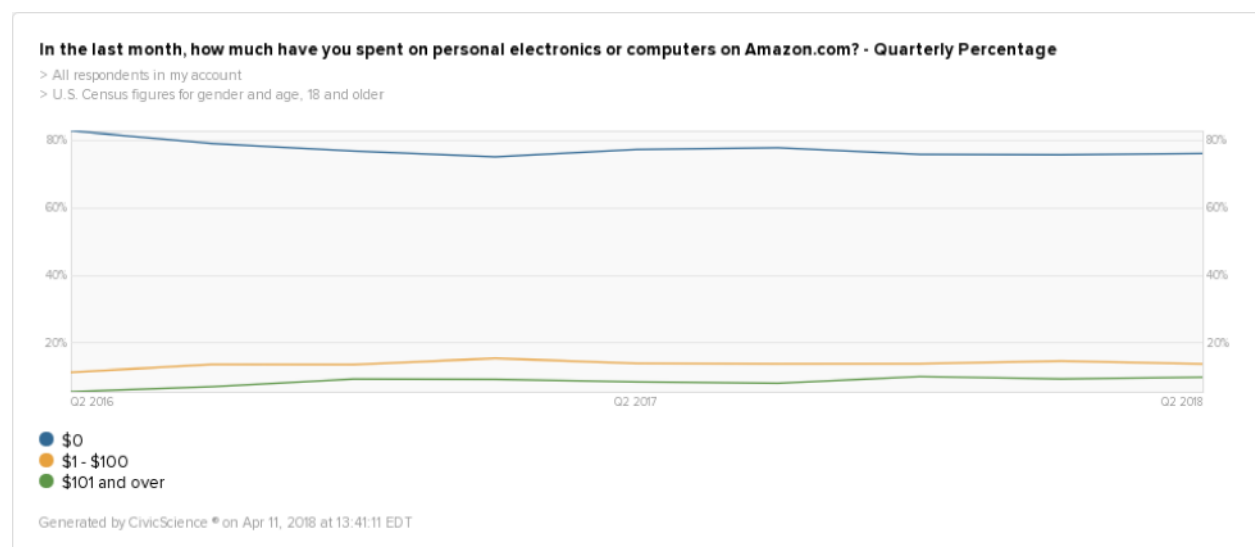
I like being 42 and knowing that my happiest days are still to come.

But I'll still go back in time every chance I get, as long as I can return to the present – and as long as my liver can still handle it.

And that, my friends, is the deepest this little email will ever get. Here are a few lighter things we're seeing right now:

**Happiness is also very closely correlated with another thing – saying the phrase “Dilly Dilly.”** Yeah, let's lighten things up real quick. Some of the more [culturally-meaningful research](#) we did this week looked at the what-I-thought-was-ubiquitous “Dilly Dilly” rallying cry from the Bud Light commercials. First, I guess it's not ubiquitous, as 39% of Americans didn't even know what we were talking about. Outside of whatever rock those people are living under, the majority of people (54%) like it, even if they don't say it. More importantly, people who say “Dilly Dilly” are nearly 3 times more likely than those who don't like it OR say it to be “Very Happy”. It's even equally true among Trump-lovers and Trump-haters, Republicans and Democrats – which is virtually unheard of today. So, Dilly Dilly!

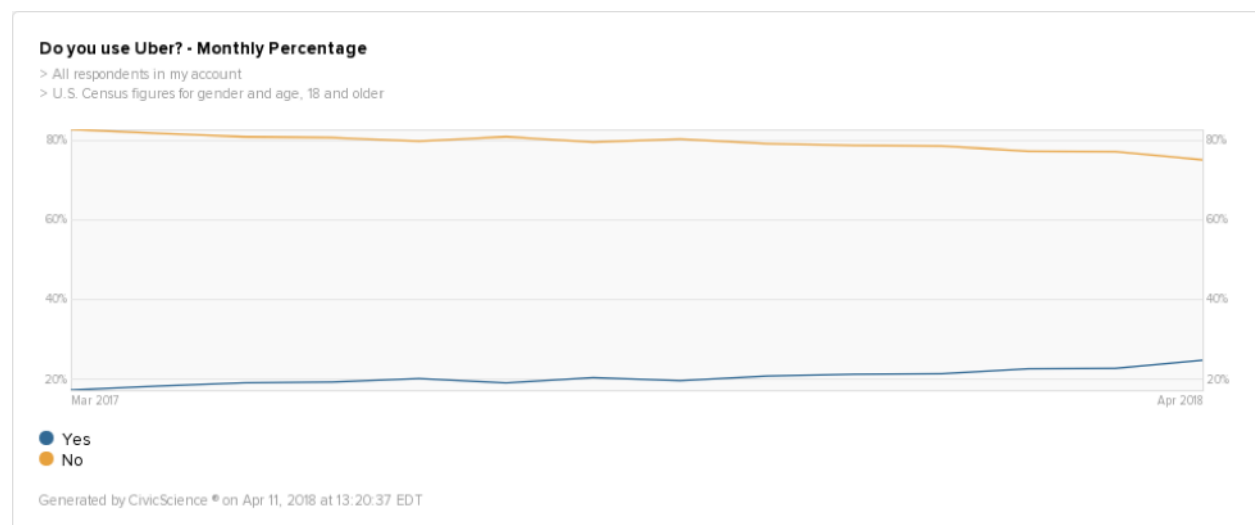
**Consumer electronics is one category where Amazon doesn't seem to be killing it like everything else.** It's hard to find many chinks in the Amazon armor but if there's one product sector that doesn't seem to be growing as fast as many others, it's in the electronics and computer space. Maybe Best Buy is one of the companies that can hold Amazon somewhat at bay. Maybe people just want to touch and feel a device before they make the investment. All I know is that we look at dozens of Amazon indicators in our data and none of the charts look like this one.



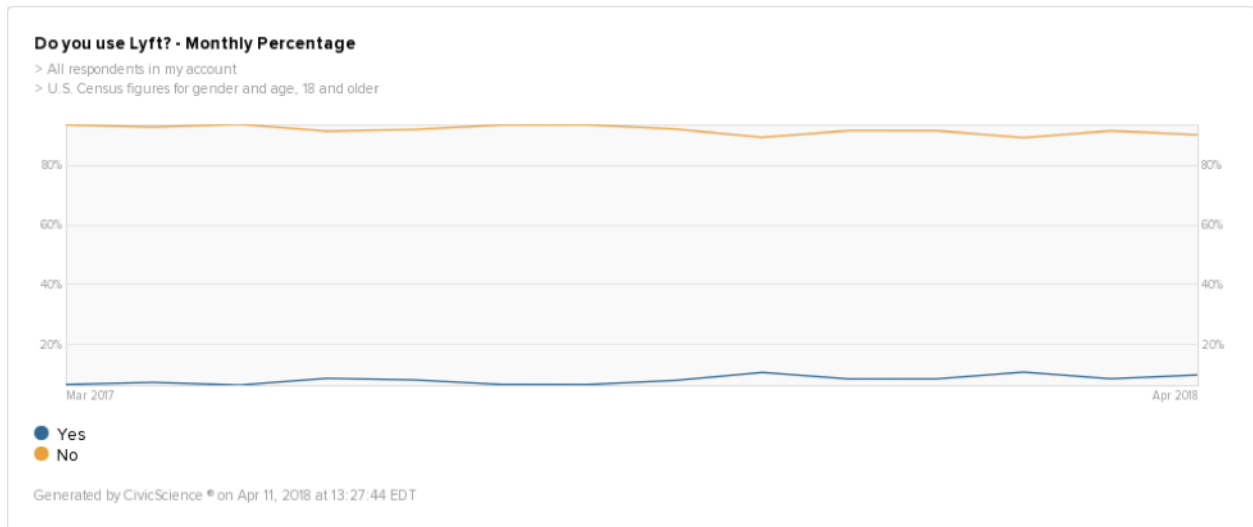
**There's really no reason to be optimistic about another professional football league.** Seriously. Why anyone thinks now is a good time to launch the [Alliance of American Football](#) is so far beyond me I can't even explain it. It certainly wasn't based on any empirical data – or at least any [data we would put our names on](#). The NFL's woes aren't just about [politics](#), [anthem protests](#), or [concussion woes](#). It's all of those things, plus a huge [young-person problem](#) with a big side of media fragmentation. Let me know if you disagree. I have a combined brick-and-mortar video store and travel agency concept I'd like you to invest in.

**Conversely, I would keep betting on Marvel comic book movies until they run out of them.** With news that *Black Panther* toppled *Titanic* in its box office haul, any theories that comic book movies were losing steam sunk right along with it. [Our own numbers](#) painted an even more impressive picture. *Black Panther* not only brought casual movie-goers into the theater; a huge portion of the audience weren't necessarily even action movie fans. Our data actually found that the film's ticket-buyers over-indexed more as comedy fans than action fans. Crazy.

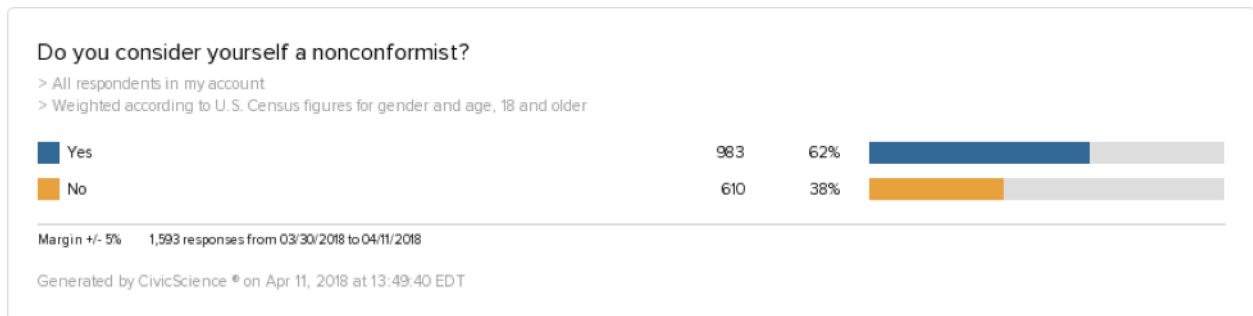
**Uber's growth seems to be accelerating.** After a bumpy 2017, Uber looks to be regaining its mojo, with particularly noticeable gains in the past 6 months. It's starting to break through one of the critical tech-adoption ceilings we often see in our data. Next stop: 33% penetration.



## Lyft, not so much.



## Random (Deep) Stat of the Week



So does this mean that being a nonconformist is now considered...conformist? Hmm.

Hoping you're well.

JD



## Tribalism is a Bitch (4/21/2018)

Want to see something super funny? Go to Facebook or Twitter and post a comment like this:

*“Man, I really hate Bill O’Reilly and Trevor Noah. They’re the worst.”*

You’ll hear crickets. Everybody wants to ‘Like’ your post and hate it at the same time. It drives them crazy.

If you don’t clearly take one side or the other (and there are apparently only two sides today), most people can’t compute it. If you dislike Donald Trump, you have to dislike everything he does. There can be no middle. There can be no case-by-case.

We were approached a few weeks ago by a large, household-name media company about syndicating our content (including this email) and co-branding a recurring poll. They could give us, truly, 10,000 times more reach than we have today. For a little company in Pittsburgh that dreams of catapulting itself into the public consciousness someday, it was nearly impossible to turn down.

But we did.

Because no matter what we do, our data would be tied to the brand – and the perceived (or real) biases – of that media company, forevermore. Publishers have to take a side today. We can’t. They’re entrenched. We’re not.

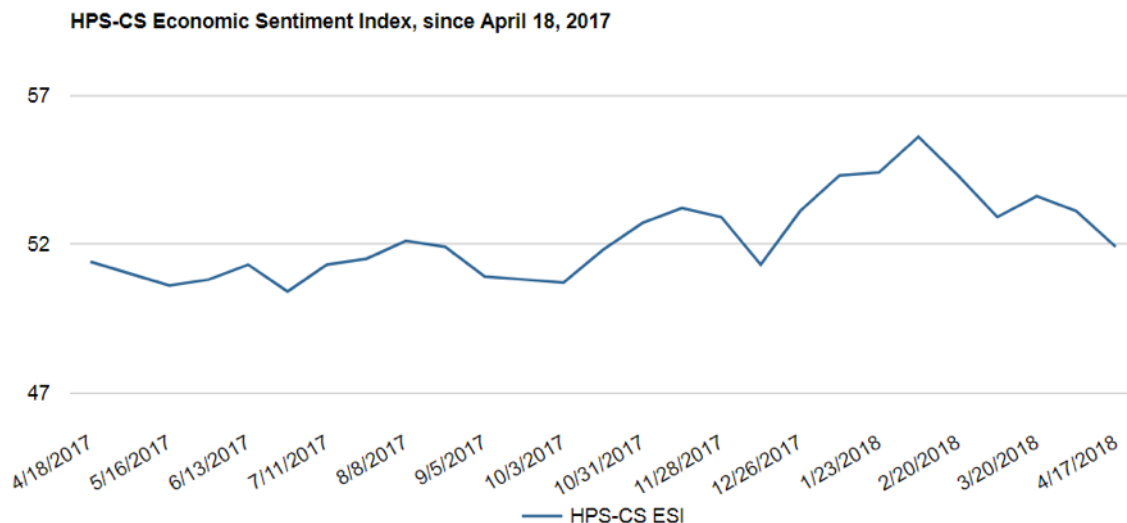
It wouldn’t matter what our numbers say, only whether they affirm the beliefs of *their* readers. Either way, we become fake news to one tribe or another. Maybe that will happen to us anyway. But at least now we own it.

So, for the time being, it’s just me and you – if only until our marketing people beat the altruism and ambition out of me. Please tell your friends and keep the comments coming. And we’ll keep bringing you the truth.

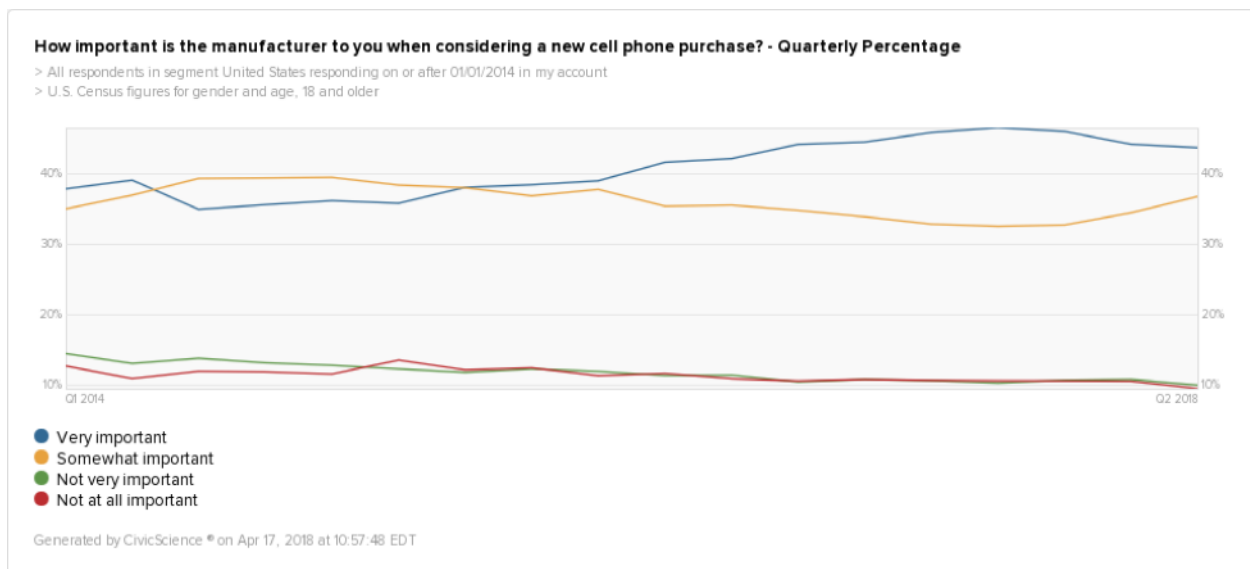
Here’s what we’re seeing right now:



**Consumer confidence is still in a funk.** Our Economic Sentiment Index hit [its lowest point](#) since December, trending toward levels we haven't seen in nearly a year. Outlook for the broader U.S. economy was the biggest drag, falling over 3 points in the past two weeks. Maybe it's because we're in tax season. Or perhaps the political turmoil is starting to take its toll. [Economists were surprised](#) last week when the latest U. of Michigan Index showed an unexpected steep drop in early April. But you weren't surprised, were you?



**In unexpectedly-related news, people care much less about their mobile phone manufacturer than they did a few months ago.** Look at the dark blue line below – people who say their phone manufacturer is “Very Important.” Why is that interesting? I’m glad you asked. Because if I showed you our Economic Sentiment Index over that same period, the shape is nearly identical, with one leading the other just slightly. And why does that matter? Because it could help us predict everything from price sensitivity to brand loyalty to switching propensity. Needless to say, we are data-science-ing the shit out of this right now, technically speaking.



**Jeff Bezos is smarter than I am.** I hope you saw [the Amazon/Best Buy news](#) this week, whereas the former will begin selling its devices in the stores of the latter. And when you saw it, I hope you remembered the [coincidentally-timed email](#) I sent you last weekend about Amazon's plateau in consumer electronics. I could gloat about seeing that in our data but, obviously, Bezos & Company saw it months and months before we did. He makes me so mad sometimes.

**It was definitely a rough week for Starbucks.** Despite what I thought was a master class in crisis response from Starbucks' leadership, the damage was clearly done, if temporarily. [Negative sentiment toward the company skyrocketed](#) in the days following the racially-charged incident in Philadelphia. Millennials were particularly affected by it. My guess is that the numbers will bounce back as soon as everyone starts freaking out about something else.

**Millennial women are changing the fashion and apparel industry in a big way.** It could have been the yoga pants. Or the UGGs. But something in the past few years triggered a rapid trend toward comfy-ness in the clothing world, particularly among Millennial women. For the first time, [we're seeing](#) that cohort place more value on "Comfort" than "Price" when it comes to clothes and accessories. The macro-economic climate could have something to do with that too, but generally, younger women haven't been as affected by that in our data. Personally, I think it's a function of our accelerating stay-at-home economy. It's easy to prioritize comfort when you're just sitting on the couch, drinking wine, eating delivery, and watching Netflix.

**Please indicate your gender compared with *Which of the following is MOST important to you when purchasing clothing and accessories?***

> All respondents in segment Age: 18 to 34 Year Olds - US in my account  
> Weighted according to U.S. Census figures for gender and age, 18-34

**Please indicate your gender**

Male (49%)



Female (51%)



**Which of the following is MOST important to you when purchasing clothing and accessories?**



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**Millennials might kill the vitamin and supplement industry too.** I'm usually the first to caution against confusing "generational" phenomena with "life stage" phenomena. It's quite possible that Millennials (and also Gen Xers) are [using vitamins or nutritional supplements at a much lower rate](#) than Baby Boomers because they're just younger, healthier, and feeling immortal. But it's also very possible that these younger generations will never rely on supplements to the same extent because they're just so much better educated about healthy eating than their predecessors. We know Millennials are drinking less, sleeping more, and not doing a bunch of other things I was doing as a kid, like eating Salisbury steak TV dinners and chugging high-fructose corn syrup while watching Night Court.

### Some Random (Cantina) Stats of the Week

- 25% of people say Mexican food is their favorite (+1)
- 17% of people say they eat Mexican food four times per month or more (+1)
- 41% of people like cilantro, 25% don't, and 34% have no opinion (Love It)
- 43% of drinkers prefer margaritas while eating tacos (+1)
- 30% of drinkers prefer domestic beer and 27% prefer Mexican beer while eating tacos
- 20% of people don't like to eat tacos and can't be trusted

I guess I should have saved this for my first email in May. Oh well.

Hoping you're well.

JD



## How My Marriage Works (4/28/2018)

My wife and I are celebrating our 15th anniversary this weekend. Time flies.

Tara kept her maiden name when we got married because she was already known in her field and – oh, who the hell am I kidding – she’s not a masochist. People in our overlapping professional circles often have no idea we’re married, which can be entertaining.

She has a big job at Carnegie Mellon to go with my entrepreneur gig. The logistics are insane. We’ve had a quick passing hug in an airside terminal, one of us arriving, the other departing. We’ve been on foreign continents at the same time and never saw each other. We don’t swap gifts or cards on most holidays (or anniversaries), both just grateful to have one less to-do item.

But it works. In a decade-and-a-half, I’ve only been banished to the guest room three or four nights. She still rolls her eyes at me (slightly) less than my 14-year-old and neither of our kids has ever eaten a Tide Pod. So yeah, we’re crushing it in the grand scheme. It helps that we have an awesome time together when we’re not adulting.

Companies should pay more attention to the changing dynamics of marriage/partnership and what it means to their industry. Tara manages our finances, makes the investment and real estate decisions, and buys every car. I do the grocery shopping, cooking, lunch-packing, and kitchen cleaning, and coordinate our kids’ social lives. She’s huge into sports and perennially beats me at fantasy football. I chaperone the school picnics.

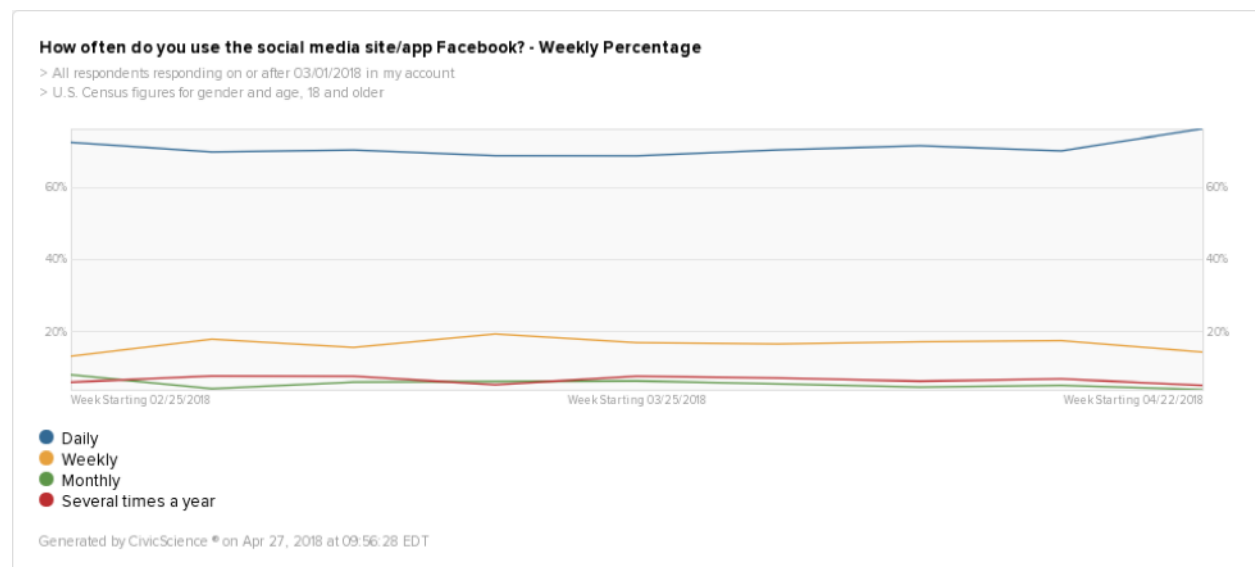
While that stereotype-busting isn’t new or even novel anymore, marketers still haven’t figured out how to communicate with us. We share Netflix, Amazon Prime, and a dozen other memberships. The stuff “recommended” to one of us or the other is hilarious sometimes. I see too many ads that were clearly not aimed at me. Many brands and media companies seem to think it’s still 1950.

We’re going to delve more into this, so, let me know if you have any stories or insights of your own to share. I hope whatever relationship you’re in, it works as well as ours does.

Here are a few interesting things we’re seeing right now:

**Our paying clients get really crabby when we tell you our best secrets ahead of earnings season.** This week was a particularly tough one to bite our tongues. Let's start with:

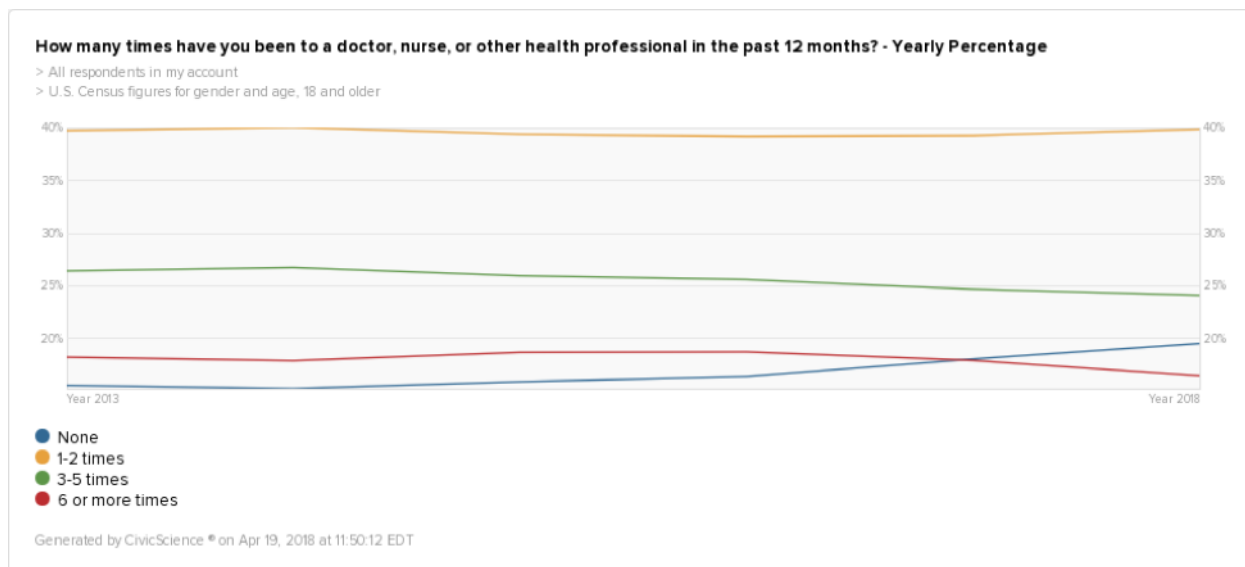
**Facebook-** You may have wondered why we were so quiet after the whole Cambridge Analytica dust-up. Frankly, there was no evidence in our data of anything other than a short-term blip, blown out of proportion by a vocal minority. Any immediate declines in daily users in late March bounced back and, recently, then some. Stop doubting Facebook. How many times do I have to [tell you](#) that?



**Amazon-** They obliterated Wall Street's earnings expectations (but not ours). We showed you harbingers of this [in January](#) – like the fact that weekly usage of Amazon Prime grew by over 20% in the 4th quarter of 2017. Those people clearly hit their spending stride in Q1.

**Chipotle-** Another earnings beat that defied conventional wisdom. The most promising sign in our data was a leveling off in late 2017 ([which we told you](#)), followed by a 10% decline in negative attitudes toward the brand among Millennials (the restaurant's driving force) in Q1. My daughters are even warming back up to Chipotle and they're the ficklest people ever.

**The ACA keeps the doctor away.** [How about this](#) for the law of unintended consequences? Doctor visits among U.S. adults have plummeted since 2016 – with the number of people who say they have not visited a medical professional in the past year



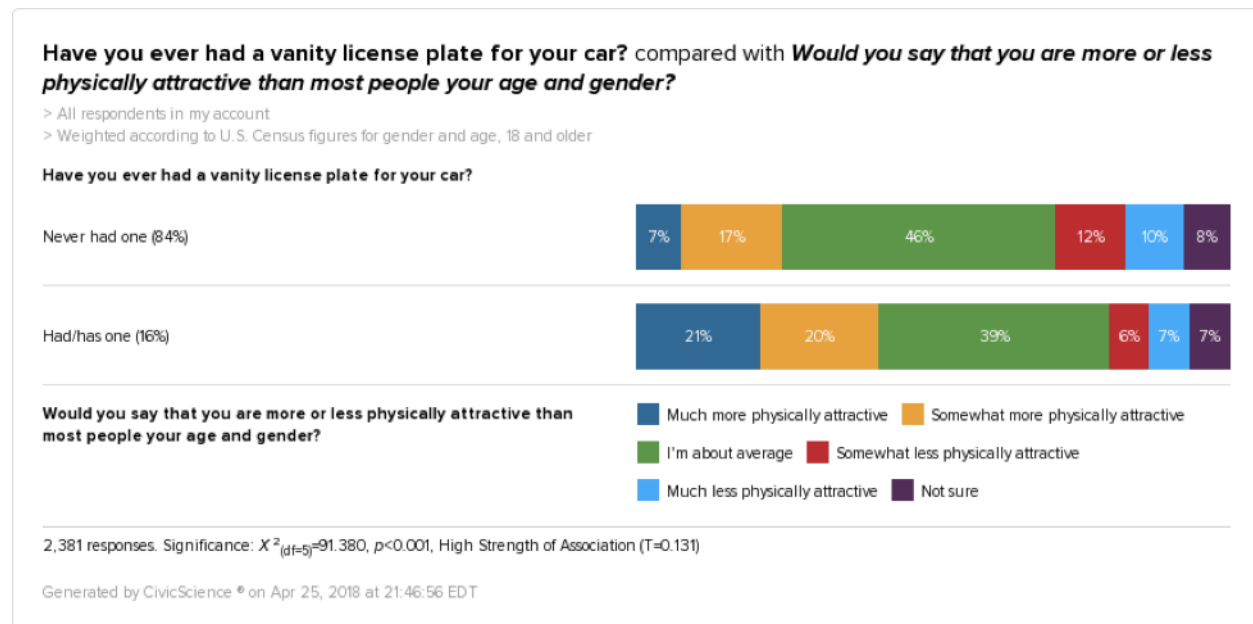
increasing by 19%. And no, this isn't a result of people just getting healthier. Those who pay for insurance out of pocket to comply with the ACA are over 30% less likely to see a doctor than someone with employer-provided healthcare and 75% less likely than someone on Medicare or Medicaid.

**Immediacy is still driving brick-and-mortar retail.** With all of the much-publicized woes of physical retailers, it's easy to forget that [a clear majority of Americans still do most of their shopping in-store](#). Why? Because they can get what they want the very moment they want it. Ubiquitous same-day delivery could be the final nail in the coffin when it comes.

**People prefer to exercise alone.** I don't know why [the statistical magnitude of this](#) surprised me so much. People want to work out but very few want to do so in groups (except Millennials) and even fewer want to confront the terror of a personal trainer. This could explain why a company like Peloton can have so much success – it comes along during the rise of the stay-at-home economy. You get the motivational benefits of a group/trainer without having to compare yourself to the chiseled and vain people beside you.

**Speaking of vanity, they call them vanity plates because vain people have them.** I am just so amused that this hypothesis turned out to be true. As expected, [people who have personalized license plates on their car](#) over-index as wealthy and older (sorry to stereotype but I'm picturing the midlife-crisis-Porsche driver). But the kicker is that when we look explicitly at whether those folks are in fact, vain, the answer is

overwhelmingly ‘yes’! Vanity plate owners are a full 3X more likely than non-owners to think they are “Much more physically attractive” than other people their age or gender. I love it.



## Some Random (Marriage and Wedding) Stats of the Week

- 41% of people believe ‘late twenties’ is the ideal time to get married, 11% say ‘Never’
- 71% of married women took their husband’s last name
- 19% of people typically cry at weddings
- 31% of people hate going to weddings
- 50% of people prefer traditional wedding vows, 26% prefer personalized vows, 24% don’t care
- 40% of people think that living with a significant other before getting married is “hugely” important; 20% believe it’s morally wrong
- Father of the Bride is the most popular wedding movie of all-time, followed by My Big Fat Greek Wedding and Wedding Crashers

Anyway, I’m off to celebrate.

Hoping you’re well.

JD



## Consensus is an Illusion (5/5/2018)

Consensus is an illusion.

If I've learned anything from studying a billion answers to 100,000 poll questions over 8 years, it's that. People don't agree on anything. 13% of Americans don't like Doritos. 4% prefer the middle seat on a plane. 8% don't like Tom Hanks. How could anyone not like Tom Hanks?

Some of my friends would say it's more absurd that 40% of Americans approve of the job the president is doing. "Who are these people?" they ask.

And that's the problem.

You might think you see consensus. You don't. It's a mirage, borne of whatever media and social bubble you've constructed around yourself. There are people we don't know, worrying about things we don't understand. That's how we ended up here in the first place.

And that's why we need trustable, objective polling data. Social media tells us what the most vocal people think. Conventional media tells us what we want to hear. It's not real.

So, we're building a polling app. We've been working on it for over a year. It's in beta right now – and no, you can't get an invite, so stop groveling. I'm not ready to show it to you.

The funny thing is, the simpler we make it, the better it does. There are no bells or whistles, no rewards or points, no games. Answer a question, see the results and a little nugget of insight. Answer another question, get another result. That's it. But people keep answering.

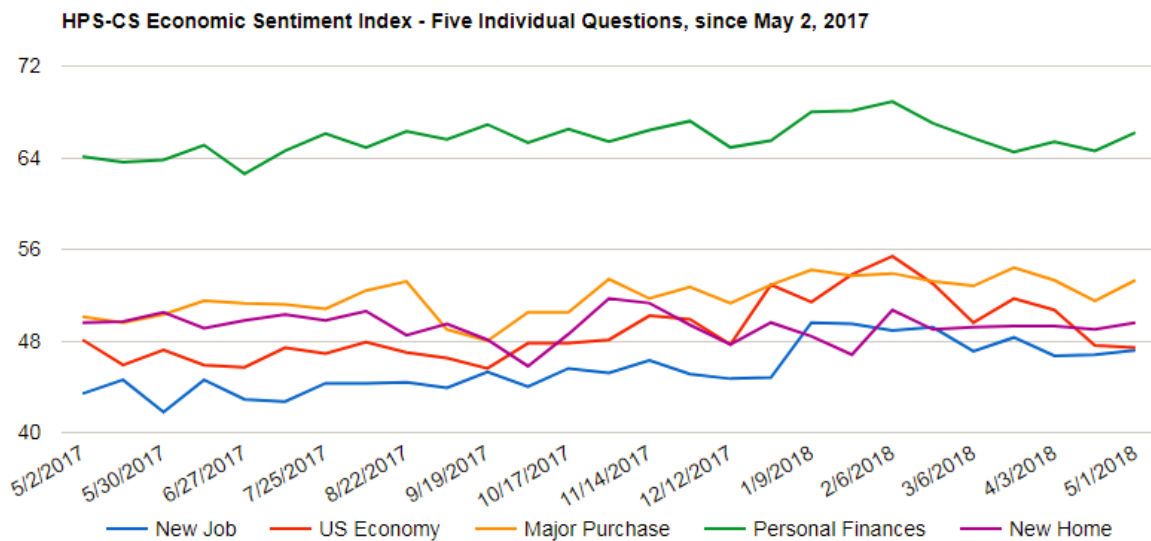
Who knows if it will scale. The odds are terrible. It will compete with a gazillion other shiny objects all vying for your screen-share. We're not gambling our business on it, that's for sure.

But we have to try. And if we don't get it right, someone else has to. Otherwise, we're all blind.

Here's what we're seeing right now – a real mix this week:

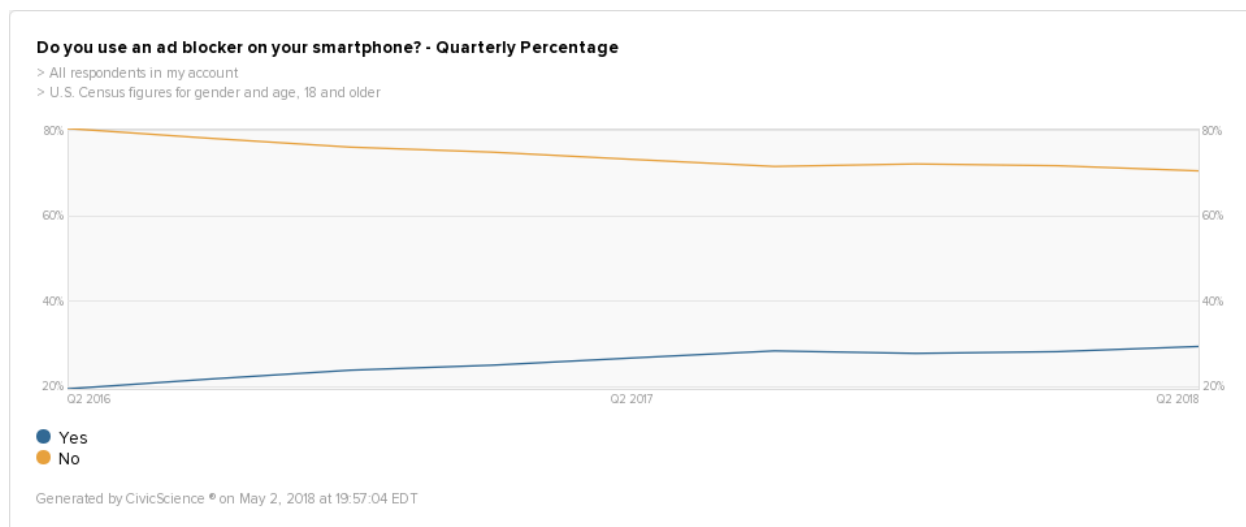


**Consumer confidence had a tiny rebound.** I don't even want to get excited about this. Our [Economic Sentiment Index](#) basically just regained the losses it saw in our last two-week reading. People are feeling better about their personal finances and major purchases, likely because tax season is behind them. I'm more concerned that one indicator – confidence in the U.S. economy – continued to falter, reaching its lowest point since last October. Wait until rising gas prices start pinching people, come summer vacation season.

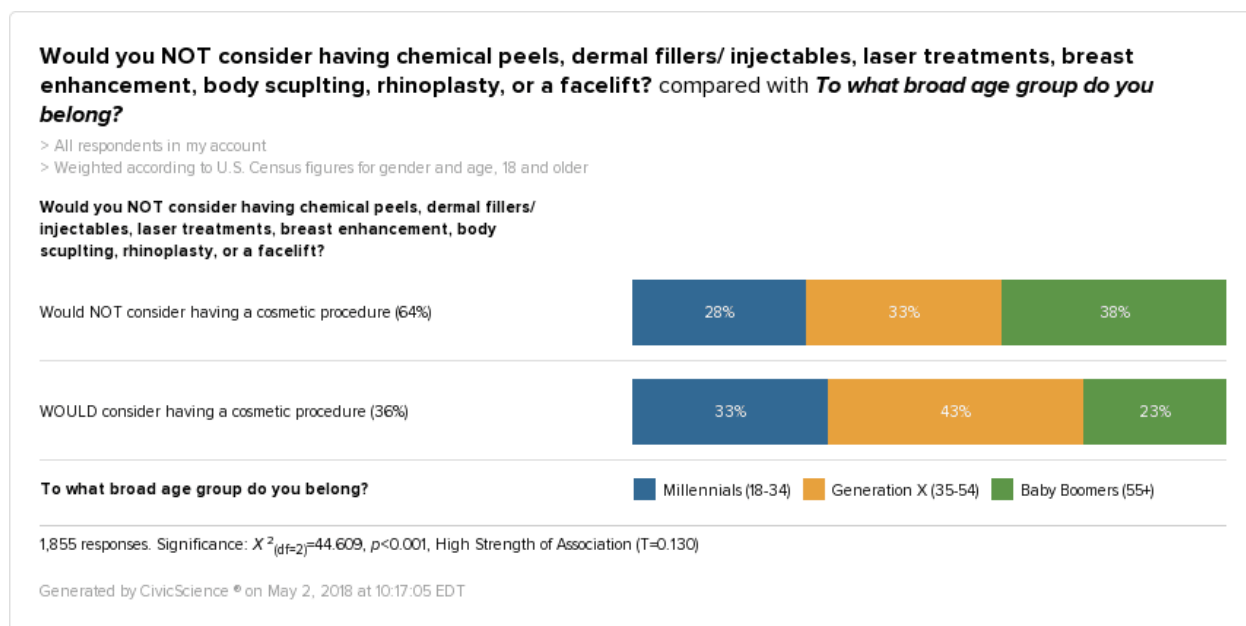


**Don't assume someone's income is correlated to the quality of their education.** There's a ton of information in [this report we wrote up](#) this week. Here are the highlights: 86% of people are satisfied with the highest degree they earned. The higher the degree or the older they are, the more satisfied they are. College dropouts are the least happy. Most interesting is that people who are happiest with their education are more likely to make under \$50,000/yr than they are to make 6-figures-plus. These are the things that give me hope for humanity.

**Publishers seem to have stopped the spread of ad blockers in their tracks.** We've seen a good old-fashioned plateau in ad blocker adoption among smartphone users. All of those 'you-can't-read-our-articles-unless-you-whitelist-us' warnings from web publishers appear to have done the trick. Nicely done.

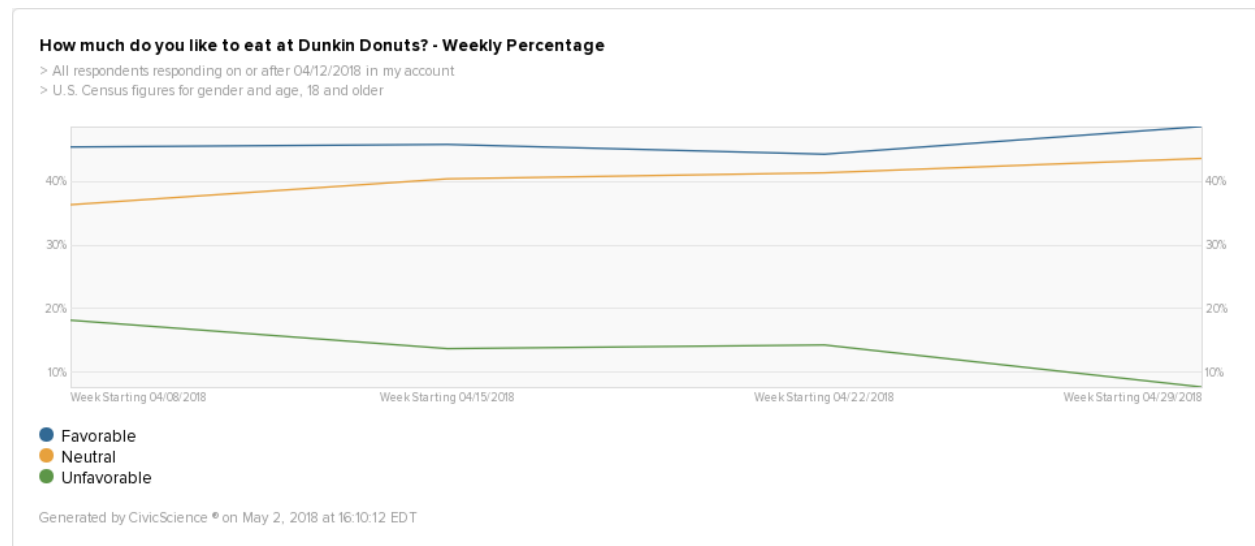


**We can learn a lot from trends in cosmetic procedures.** If it wasn't for the awesome work she did on [this report](#), I would lose my mind over a Millennial in this office mocking my fellow Gen Xers and our midlife crises. But she's right. Gen Xers want to look more youthful. Rich people are more likely to want nose jobs. Stereotypes are a real time-saver.



**In surprising Gen X news, my cohort hasn't lost its love for video games.** Some of my favorite college memories were spending days on end playing Tomb Raider and Madden in our fraternity house, with the ashtray piling up to the ceiling and McDonald's wrappers carpeting the floor – which also explains the countless date-less weekends I had, incidentally. [It turns out](#) the Nintendo Switch is making my peer group nostalgic. Specifically, 35-44-year-olds make up a larger group of Switch owners than teenagers or college kids. OK, so maybe a lot of those super-cool Gen Xers are just buying them for their kids. But I'll bet they're playing too.

**Look whose net brand sentiment has been improving appreciably since April 12th.** Whoever can correctly guess why gets a free email from me next Saturday.



## Random (Teeth) Stats of the Week

- 72% of people have had their wisdom teeth removed (I'm in the 28)
- 20% brush their teeth in the shower (Um, no)
- 9% brush their teeth 3 or more times per day (Nope)
- 39% show their teeth when they smile for pictures (Usually)
- 29% don't tell others when they have food stuck in their teeth (Always)
- 47% let the faucet run while they brush their teeth (Nope)
- 34% grind their teeth while they're sleeping (that they know of)

Hoping you're well.

JD



## People are Losing Weight & Ditching their Mobile Devices! (5/19/2018)

Just got back from a phenomenal trip to Austin. I saw six bands in two nights (including a private gig at ACL by the Doobie Brothers, who I can't imagine were any better 40 years ago, even sans Mike McDonald). My blood-barbecue-content is way over the legal limit.

We were there for a high-end market research conference, which was way more enthralling than it sounds. Bob Gruters from Facebook and I did a fireside chat about our work together. Astro Teller from Google X gave the most riveting keynote speech ever.

Side-note 1: I've decided I need glasses or Lasik, on account of all the people I probably creaped out from staring awkwardly at their chests to read their name tag. There has to be a better way.

Anyway, there were about 300 people. 10% were CEOs of companies you know. Everyone had some kind of lofty title. And it was diverse. I met execs from auto parts stores to Fruit of the Loom to the guy who invented the InstaPot. I think they said 20 industries were represented.

Side-note 2: I talked to a bunch of new people who apparently read this thing. Two of them identified me as "*The guy with the [made-up friend](#).*" Nice to meet you all.

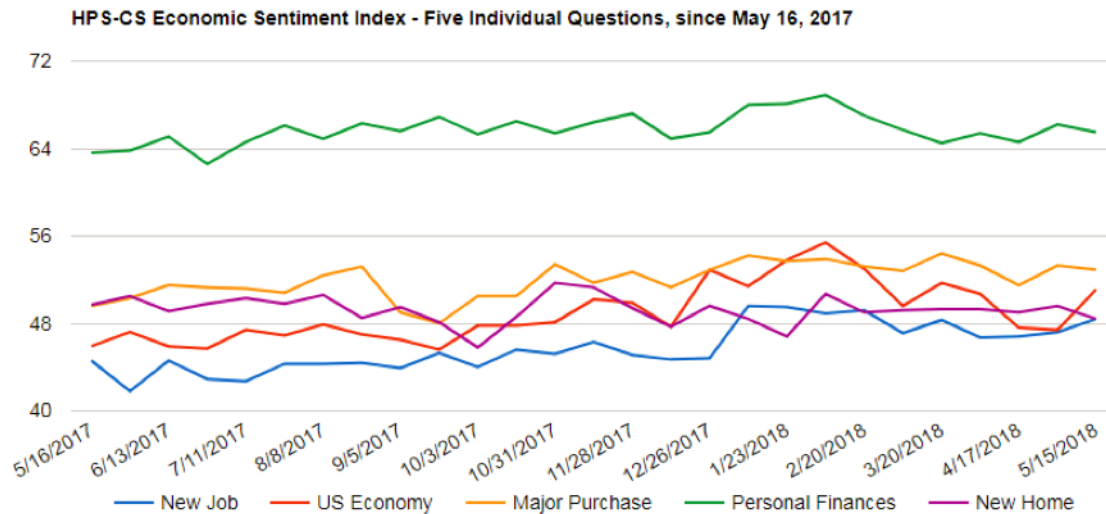
The ethos of the event was people learning about trends in industries other than their own. That's the hallmark of successful leaders today. If all you do is pour over data about *your* business, *your* competitors, or *your* industry – you're clueless. The health insurance industry is impacting your company in some way. So is auto. And banking. And fashion. Obviously, tech.

Everything is affecting everything and if you aren't trying to understand that, you're going to lose. I guarantee it.

Here's a bunch of all-over-the-map things we're seeing right now:

**The consumer confidence rollercoaster climbed over the past two weeks.** Our Economic Sentiment Index had its [second consecutive decent reading](#), though still well below the high point we saw in February. Steep improvements in the outlook for the U.S.

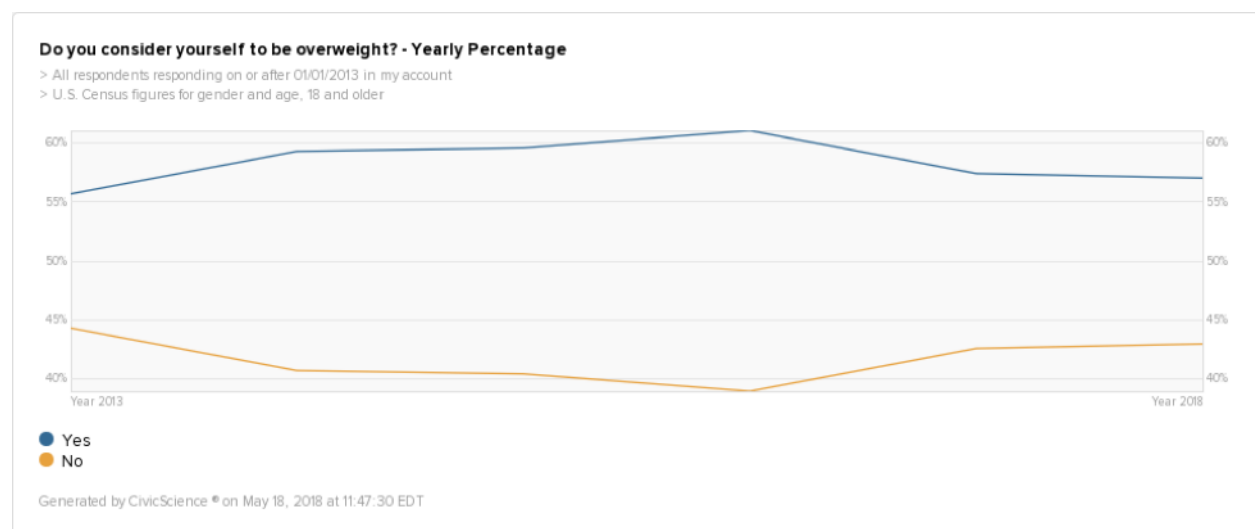
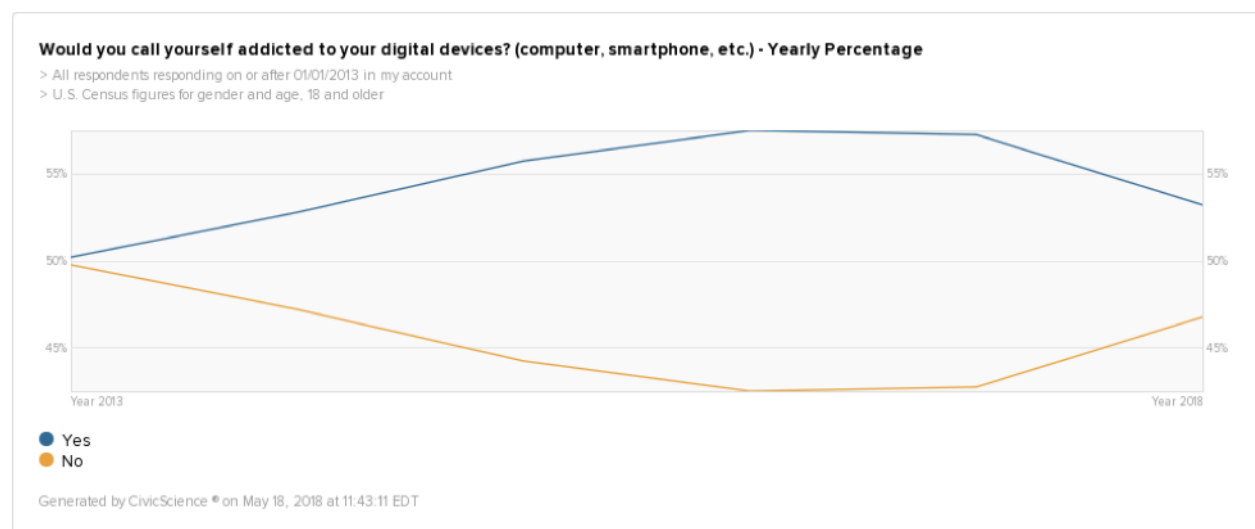
economy and the job market overcame subtle declines related to the housing market and personal finances. It's a big mixed bag at the moment. Your guess is as good as mine where it's all heading.



**In-store retail apps may not solve any real problems.** Lots of brick-and-mortar retailers are developing mobile apps that serve as “shopping companions,” in hopes that they will bring more people – particularly Millennials – in the door. Makes sense. Here’s the problem: The [type of person who would use an app like that](#) already way over-indexes as an online shopper and, even worse, a show-roomer (ie. they go to the store to see a product, then buy it later on Amazon). Gen Xers are using in-store apps more than Millennials – presumably because they were already shopping more in those physical stores in the first place. Maybe these kinds of apps are a necessary box every retailer has to check. But they’re no silver bullet.

**Good news! Americans are losing weight and spending less time on their mobile devices!** Also, people are overweight, screen-addicted lying liars. Check out the two charts below – or cover your eyes if you scare easily. On roughly the same timeline (call it late 2016, feel free to guess why), the percentage of people WHO CONSIDER THEMSELVES overweight and/or addicted to their devices has been in steady, steep decline. And they’re not the only things like this we see. What’s causing this magical improvement in public health? Delusion, tribalism, politics, and everything in between, that’s what. America may be forging a new era of normalization, driven by the growing culture of us-versus-them, at-least-I’m-not-as-bad-as-you, who-are-you-to-judge-me.

Expect way, way more from us on this. It may be one of the most profound things happening in our society right now, with all sorts of commercial implications. Sigh.



### In less meaningful news, we studied that whole Yanny vs. Laurel

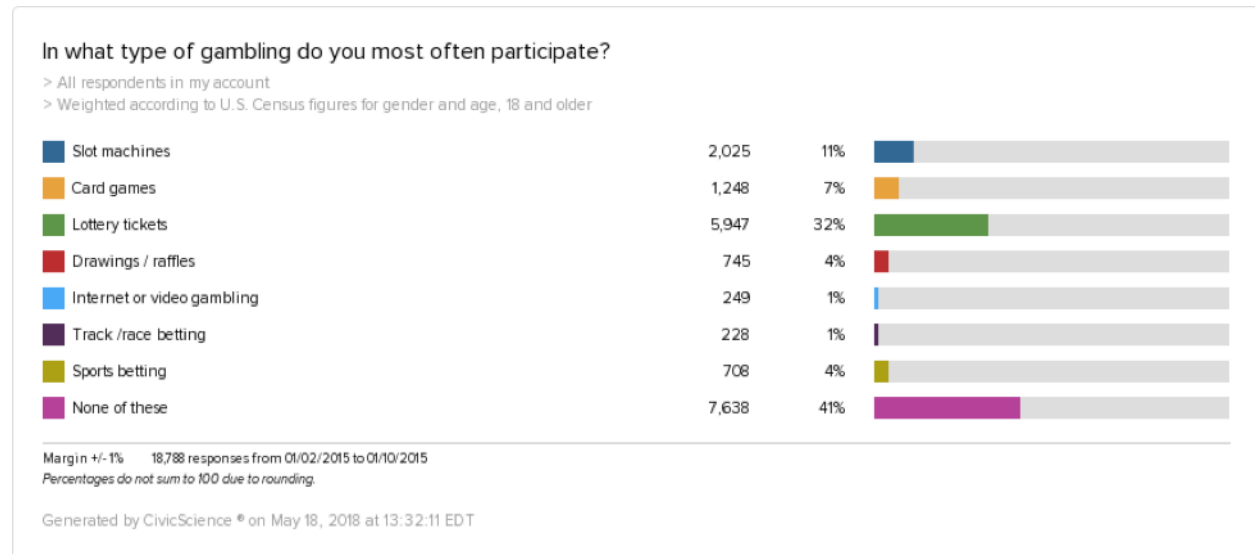
**phenomenon.** And [the findings were more fascinating](#) than I expected. People are almost precisely-evenly divided in what they hear, though there were noticeable skews based on age, region, and more.

### And in even less meaningful news than that, we're studying the royal wedding

**too.** I only mention it because I was [surprised about something](#). I assumed America would eventually outgrow its obsession with foreign faux royalty. But no, members of the Gen Z cohort are following the wedding more than twice as much as the next group (Boomers).

The royal zeitgeist seems to have leapfrogged Xers and Millennials. Count me among them.

**Sports wagering is a small portion of America's gambling fetish, at least until now.** The SCOTUS ruling this week has casinos, daily fantasy apps, and state treasuries salivating. But historically, sports betting has been among the least popular forms of gambling among U.S. adults. Lottery tickets are more popular than all other forms of



gambling combined. These numbers are admittedly a few years old, but I reran the question today to see how much it has changed. It will be more interesting to see if/how they change a year from now.

## Your Random (Band) Stats of the Week

- 20% of people have at some point been in a band, 2% are in one now
- 9% of people say it's never okay to wear the band's shirt to their show
- 25% of people have had to pretend to like a friend's band
- 43% of people have one band that they consider their all-time favorite
- Best Allman Brothers Song: Ramblin' Man (43%), Midnight Rider (31%), Jessica (8%), Blue Sky (5%), Other (13%)
- Whoever wrote that Allman question forgot Melissa, my favorite.

Hoping you're well.

JD

## Tribalism Killed American Idol (6/2/2018)

You know I try to avoid politics here. You get enough of that everywhere else.

Our job is to be objective and unemotional, even if I occasionally show my cards on things like [LGBTQ issues](#) or [gender equality](#). Otherwise, you don't really care who I voted for and I don't really care for you to know. That's our deal.

But some weeks—like this one—politics is impossible to avoid. It's permeating everything. And even if you don't obsessively watch CNN or Fox News or hang on the president's every tweet, you should be obsessing over how the socio-political landscape is affecting your business.

Because it is. Even if you can't see it yet.

Here's what we're seeing for you:

**Over one-third of Americans do not believe ABC should have fired Roseanne.** And —hold on to your hats—the [numbers broke](#) almost entirely based on political ideology. 83% of Democrats agreed with ABC's decision. Only 23% of Republicans agreed. Here's the thing: If one of your employees ever authors a tweet like Roseanne did, you should fire them. Because even if you weren't offended by the content of her words, be offended by the stupidity. Our job as leaders is to protect our companies and our teams from that kind of recklessness. Sadly, when 37% of people defend Roseanne's comment, it tells me that tribalism is destroying common sense.

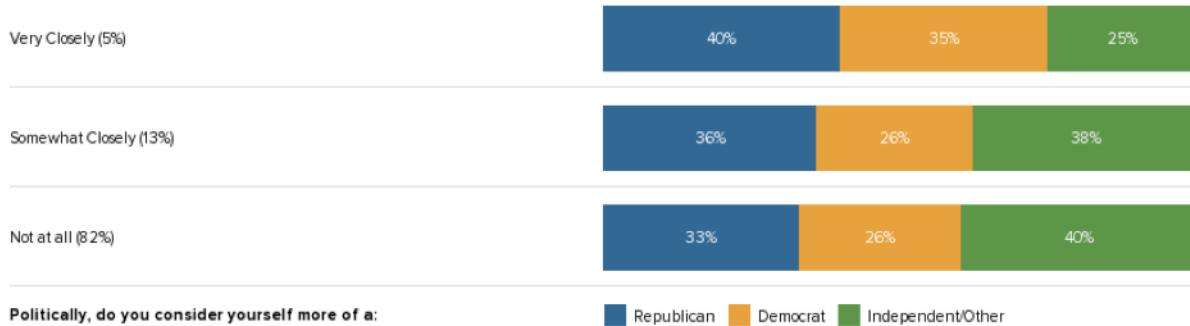
**Sticking with TV—and, coincidentally, ABC—tribalism may also be killing the entire concept of *American Idol*.** I came up with all of this research on my own, basically because I've loved *American Idol* since it started. Also, it's my company and I get to study whatever I want, so stop judging. Anyway, you should [read the full article](#) yourself because it has serious implications for advertisers. The basic premise is that, as AI's ratings have plummeted over the years, different demographic and psychographic groups left the show at a faster rate than others. This has led to certain contestants being at a significant disadvantage during the nationwide voting portion of the show. Spoiler alert: Political ideology is one of the culprits.



### How closely do you follow American Idol? compared with *Politically, do you consider yourself more of a:*

> All respondents responding on or after 01/01/2015 in my account  
> Weighted according to U.S. Census figures for gender and age, 18 and older

#### How closely do you follow American Idol?



#### Politically, do you consider yourself more of a:

■ Republican ■ Democrat ■ Independent/Other

9,370 responses. Significance:  $X^2_{(df=4)}=41.438, p<0.001$ , Low Strength of Association ( $T=0.047$ )

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**Dick's Sporting Goods reported surging sales numbers this quarter, pretty much like we told you would happen.** The business press reported [THIS](#) on Thursday. We surmised [THIS](#) in late February. I'm not saying it to gloat (at least not entirely) but to remind you that underneath all of this political madness, everything is still a numbers game. Dick's had way more headroom to grow among Liberals and Moderates than downside among Conservatives.

**For similar mathematical reasons, I bet Starbucks bounces back from the Philadelphia bathroom incident.** I know we reported that things [looked kind of bleak](#) immediately after the controversy. Then we started to see brand sentiment improve slightly in May. I saw an article from a few years ago that said approximately 20% of U.S. adults live more than 20 miles from the nearest Starbucks. And, roughly 28% of U.S. adults voted for Donald Trump. I'm fairly certain the overlap between those groups is non-trivial. I could probably prove that but I'm not going to expend the energy. Starbucks will be just fine.

OK. Now for some useful apolitical findings:

**We are entering the age of the side-hustle and that's cool.** Nearly 1 in 4 [Millennials and Gen Xers](#) report having some secondary source of income (think Uber, Airbnb, etc.) beyond their day job. On one hand, those people are more likely to have student debt, which implies they're working extra gigs out of necessity and that sucks. But surprisingly, those side-hustlers were far more likely than non-hustlers to report higher degrees of overall happiness. Who knew?

**Thrift stores are making a comeback and it feels like 1992 again.** 36% of [U.S. consumers now say](#) that they shop for clothing second-hand or at thrift stores, reminding me it's about time to replenish my flannel shirt collection. The biggest growth category for second-hand apparel retail is – you guessed it – the male, Gen X crowd. I hope I can find some Pearl Jam T-shirts...

### **Some Random (Friendly) Stats of the Week**

- 39% of people say they have more than one best friend, 22% have only one, 39% don't have someone they consider their best friend;
- 32% of people say that their best friend is a friend from childhood;
- 29% of people are NOT friends with their neighbors;
- 50% of people say they wonder if their friends are really their friends (That's so sad!);
- 41% of people say they have "overly needy" friends (probably some of the 50% above);
- 12% of people celebrate friend-aversaires (definitely some of the 50% above).

Just so you know, you are all my friends.

Have an awesome weekend.

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.

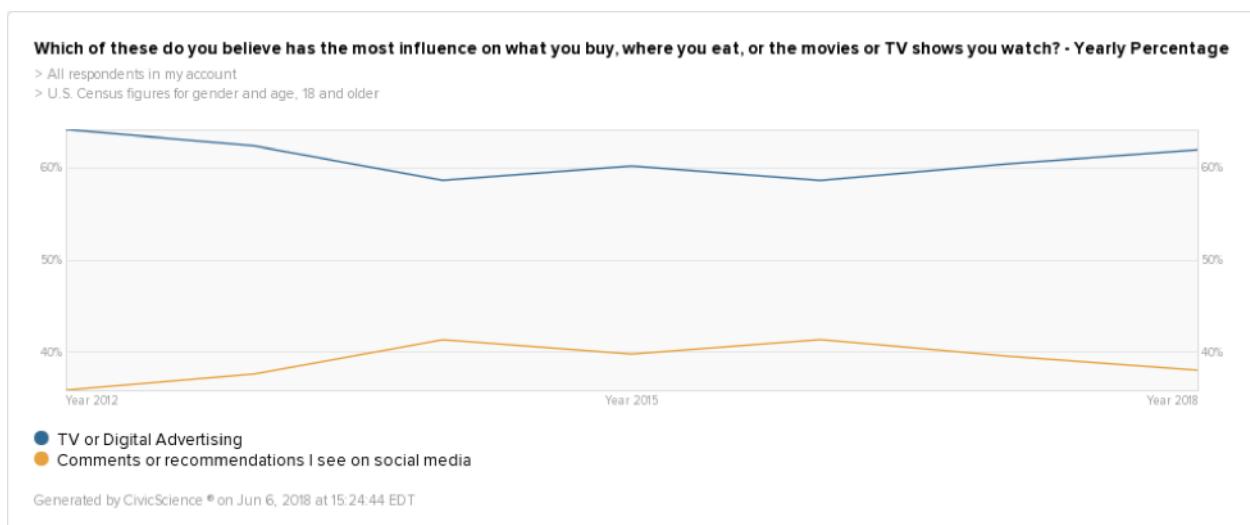
I hope this is all just a phase.

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 [the findings are fairly resolute](#): 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 [read the full write-up](#) 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 [side-by-side comparison](#) 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



## I'm 50% Redneck (6/23/2018)

Genetically speaking, I'm 50% Country. Redneck, even.

My mom is from a tiny Appalachian town about two hours from Pittsburgh. My dad hunted there as a kid with his dad and eventually became a barfly at the VFW where my mom's mom tended bar. The rest writes itself.

I spent my childhood at our cabin there, hunting, fishing, riding ATVs, and overdosing on Calamine lotion. Our daughters love it now, so we're there every weekend, biking, rafting, and otherwise sitting around a fire, listening to bluegrass and drinking copious cans of Miller Lite.

There's no cell phone coverage or high-speed Internet, which is awesome once you detox.

And the loveliest people live in the nearby town; lovely, that is, until you hear some of them talk about race and politics. There are Confederate flags. Bigotry flourishes.

For the record, they do have every reason to be ticked off. Their main street was gutted, jobs disappeared, and the brightest young people moved away for better opportunity. None of that, they believe, is their fault. And they're right, for the most part, even if they don't know why.

Sadly, many of them blame their plight on people of color – “the Others,” they're told, who took their jobs and hijacked their culture. It's easier to fear the boogiemani than to wrap their heads around global economics or education policy. I'm not apologizing for them but you can understand where it comes from. We've all done a lousy job of helping them see otherwise.

For sure, there's nothing more prevalent in our data right now than the proliferation and consequences of tribalism. It's affecting everything. And it sucks.

My guess is that the people who most vilify rural, lower-middle-class Trump supporters know few personally – much in the same way that few of those country-folk know people of different races and lifestyles beyond what they see on TV. Being “Facebook Friends” doesn't count.

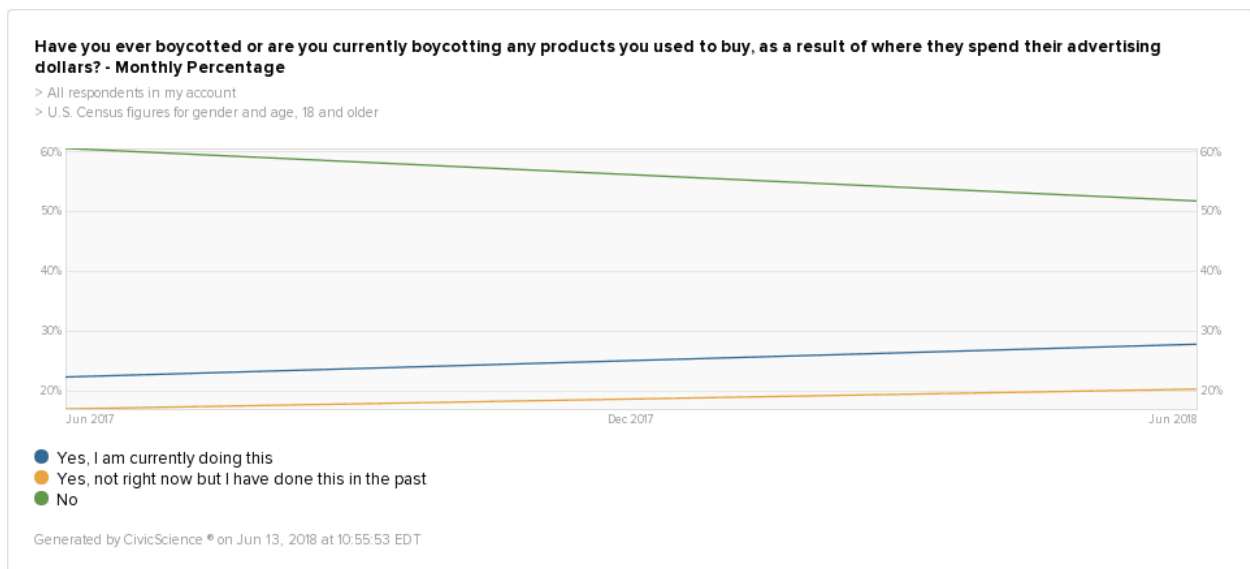
So, basically what I'm getting at is that you're all invited to our cabin, anytime. Maybe we can change the world a little and drink a beer or ten while we're at it.

I'll be there next weekend celebrating the birth of our (always and still) great nation, which means you won't hear from me for a couple weeks.

Until then, here's what we're seeing:

### **More and more people are boycotting brands based on where they**

**advertise.** Speaking of tribalism. You may recall that we wrote about this exactly a year ago. At the time, 39% of Americans were either currently boycotting a company over its media placement or had in the past. Fast forward to June of 2018, and [the numbers climbed even further](#). 25% of Americans are currently boycotting at least one brand, and 48% have done it overall. For those of you out there in brand marketing, I'm not sure there are many more profound consumer trends you should be monitoring. Beware the company you keep, my friends.



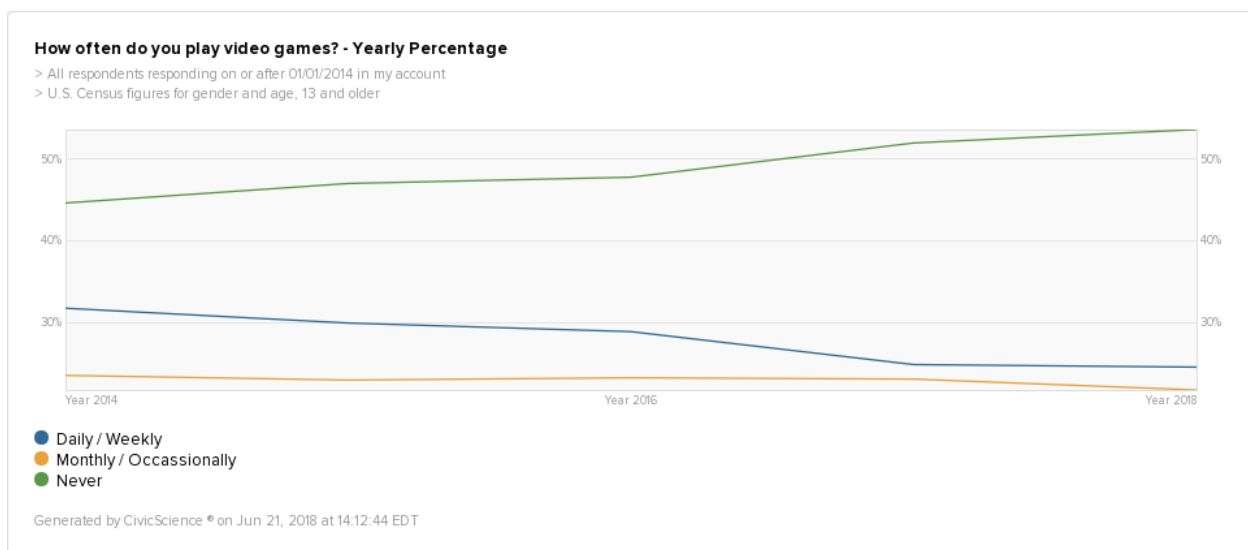
### **World Cup audiences may be down, but the value of individual viewers is only**

**getting better.** With the U.S. team a no-show this year, obviously Fox is feeling the impact in its ratings. But viewership of non-U.S. games among U.S. audiences is [up](#) substantially over 2014. More importantly, [according to our data](#), the audience is a marketer's dream: Gen Z, Millennial, Hispanic – and even more female than I would have guessed. We haven't seen any public numbers on YouTube viewership for the World Cup, but I'll bet you



a dollar they're crushing it. The incidence rate of YouTube viewership among World Cup fans is off the charts.

**The percentage of Americans who play video games has been declining even as younger people are growing more addicted.** We didn't discover this – video game sales have been dropping for a while, and companies like GameStop are paying the price. But the story isn't all bleak. Juggernauts like Fortnite, VR/AR, and disruptive gaming consoles seem to have stemmed the tide recently. We published an entire eBook on the



gaming space this week. If you don't want to [download it](#), let me know, and I can slip you a copy. I know people.

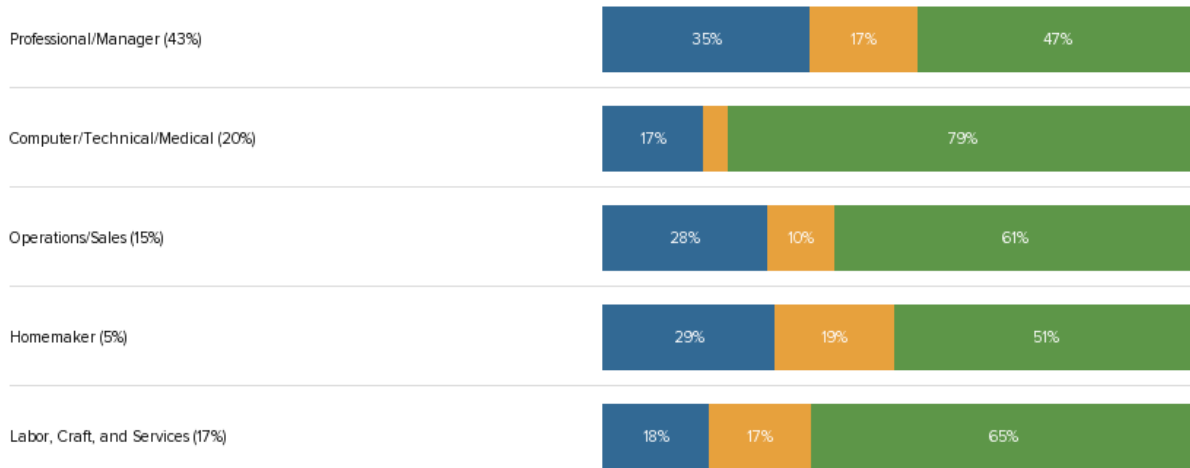
**Apparently, all of you have tattoos and never told me.** Seriously, [lots of good tat data here](#). About 1 in 4 U.S. adults has a tattoo (or more than one) and another 13% want one. Ok. Seems reasonable. Women are a whopping 50% more likely than Men to have a tattoo. Didn't know that. One-third of Gen Xers have one (and 25% of Millennials want one) – I'm ink-free but whatever. Here's the stat that made my day. When we looked at the results by job type, nobody had a higher rate of body ink than professionals and managers. You rebels, you.

### Which of these best describes your current occupation? compared with *Do you have any tattoos?*

> All respondents in my account

> Weighted according to U.S. Census figures for gender and age, 18 and older

#### Which of these best describes your current occupation?



#### Do you have any tattoos?

■ Yes ■ No, but I want one ■ No, and I'm not interested

455 responses. Significance:  $X^2_{(df=8)}=31.490, p<0.001$ , High Strength of Association ( $T=0.156$ )

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Friday was national Take Your Dog to Work Day, and I have the cutest dog in the world, [as evidenced by this article on our site](#), I don't care what anyone says. And Dog People are happier than Cat People. We also drink more vodka. And listen to more music. The numbers don't lie.

### Random (Totally) Stats of the Week

15% of people went to high school with someone who is now a celebrity;  
21% of people name their cars;  
16% of people have caught a foul ball at a baseball game;  
67% of people say they know how to identify poison ivy (B.S.);  
26% of people sometimes pretend to know a lot about something they know nothing about...

Talk to you again in July.

Hoping you're well.

JD



## Our Company is Crushing It (7/7/2018)

I hope you had an awesome holiday. I did, thanks for asking.

Partly because we had a monster second quarter.

I usually don't boast about business stuff – especially in this little email. I've done the entrepreneurship thing for too long. I know tomorrow might suck.

But right now, we're crushing it. We nearly doubled the business in 2017 and just blew last year's Q2 out of the water. I would tell you about our new customers but I can't. Big companies, it turns out, are real sticklers about people using their names or logos. It's the bane of my marketing existence.

We have almost all of the tech giants, most big TV networks, mobile carriers, health insurers, and banks. If you wear a smart device on your wrist, took a DNA test, or have a mobile banking account, there's a good chance we provide intel to the companies behind it. All from an old building in the humble (at least until Amazon HQ2 comes here) city of Pittsburgh.

We're going to start yelling our story from the rooftops, finally. We just hired one of the biggest PR firms – holy hell are good PR firms expensive – and have a few high-profile deals coming that you'll probably hear about whether I mention them or not. We're hiring more writers to publish more stuff, releasing an app, and hosting our first conference, all before the autumnal equinox. If all goes as planned, you'll be sick of hearing our name by Thanksgiving.

And that will be good. Because I won't have to use this email to brag ever again. You all seem to find much more joy in my stories of self-deprecation and misfortune.

I'll get back to that next week, I promise.

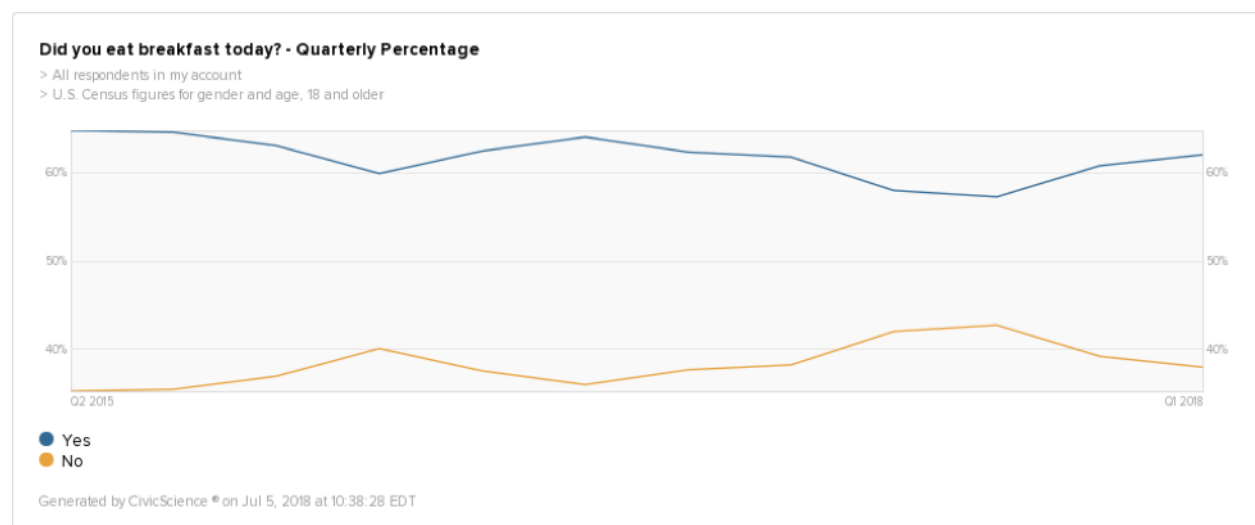
Here's what we're seeing right now:

**Harley-Davidson is in a spot of bother.** I'm a week late [sharing this](#) because I played hooky last weekend but Harley-Davidson has one helluva Trump-induced mess on its hands. Negative sentiment over HD's decision to move some production outside of the

U.S. outweighs positive sentiment by over 4:1. Almost all of the negatives come from current and/or prospective motorcycle owners. Tribalism is not to be trifled with right now.

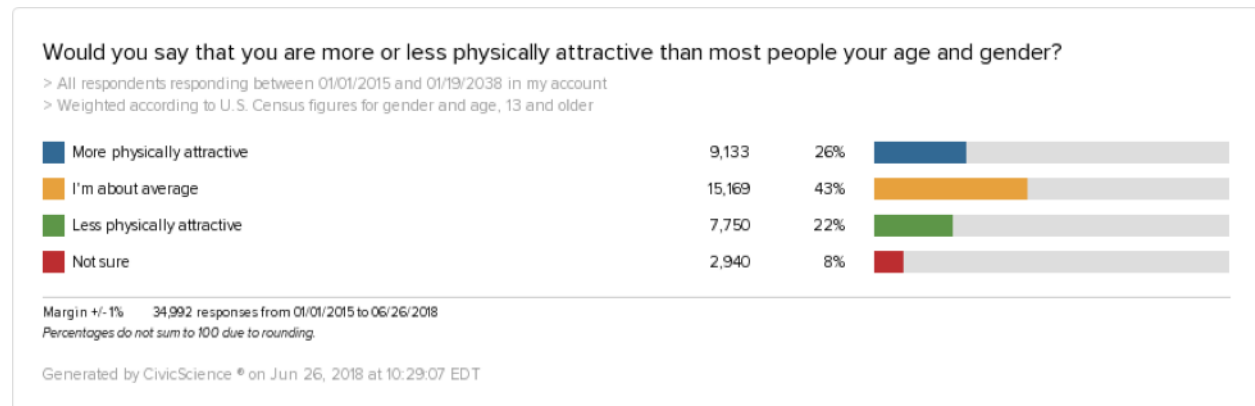
**In other week-old tribalism news, ABC's new Roseanne-less spinoff will be a fascinating Trump-era case study.** We looked at [audience interest for the \*Conners\*](#) and found some huge question marks. The likely viewership is substantially more likely to be comprised of Democrats than Republicans, a big reversal of what we saw for the original show. This could mean several things. Rs could boycott the show because of ABC's handling of the cancellation or Ds will flock to it as a means of support and solidarity. It's probably some combination of both. Whether that adds up to sustainable ratings is the biggest question mark of all.

**Trends in breakfast-eating make almost no sense to me.** I started obsessing about this when I pulled those [random stats about breakfast](#) a couple weeks back. The percentage of people who eat breakfast daily is in slight decline, though it rebounded over the past 6 months. But the numbers don't follow any obvious pattern, seasonal or otherwise. Women/men, whites/non-whites, rich/poor, all eat at similar rates. The only significant demographic differences are around age (old people eat more often) and education level (likelihood increases with education). The cool stuff was "psychographic." Breakfast eaters are more diligent financially, more socially-conscious, and – obviously – health conscious. There are interesting patterns in media habits, but I haven't decided if I want to share those yet. Still scratching my head...



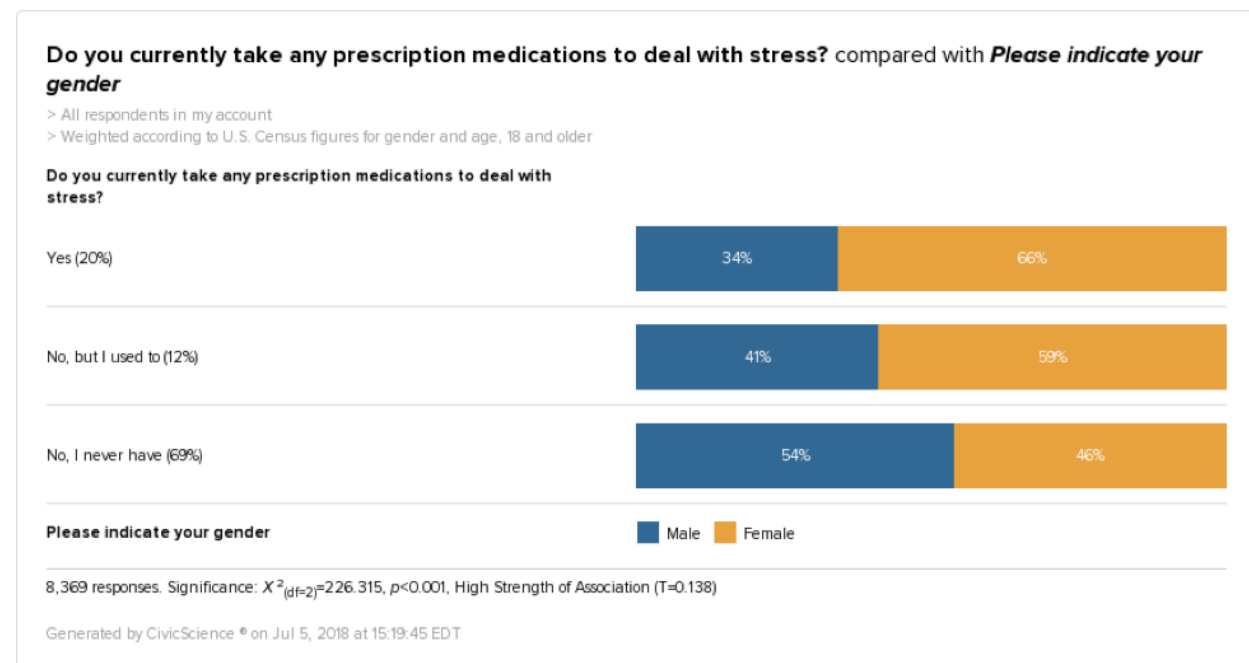
**Stunner: It's better to be tall and good-looking, for the most part.** [Tall people](#) are more likely than shorter people to earn higher incomes and achieve higher levels of

education. But they're also more likely to report higher levels of stress. Meanwhile, [people who think they're more attractive](#) than their peers attain higher job levels, live healthier lives and claim to be happier overall. Oh, and for good measure, tall people are more likely to think they're good-looking. Don't shoot the messenger if you're neither of those things. There are always outliers.



**Almost everybody in America gets burned out by their job.** And, no surprise, [the rate of burnout is highest](#) among my fellow Gen Xers, who will forever have the short end of the stick. It's worth noting that the people who make the most money are the ones most likely to be burned out. Especially people in sales or ops. So, if you're in your 40s, making over a buck fifty, and waiting for a contract to get signed, take a bow. Then take a vacation. Or a Xanax.

**Even though women are just as likely as men to suffer from job burnout, they're much LESS likely to heed that vacation advice.** Disturbingly, working [women are much less likely](#) than working men to take all of their available vacation days in a given year. That stinks. Just another way that women [are getting a terrible deal](#). Oh, and this:



### **Some Random (Vacation) Stats of the Week**

- 35% of Americans will take a vacation out of town this summer
- 26% will use vacation days to get stuff done around the house
- 27% will be doing some kind of “staycation”
- 21% of Americans have been on a cruise vacation and plan to take one again
- 26% of people eat whatever they want **ONLY** on vacation
- 39% of working adults do at least some work while on vacation
- 41% of people think family vacations are more stressful than fun

Here’s hoping you have a stress-limited, work-limited, diet-unlimited vacation of your own planned this summer.

JD

## 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 ([Here's her most recent Penguins game](#). 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 [noticed a recurring theme](#) 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



## You're Drinking Coffee Right Now & Snapchat is Screwed (7/28/2018)

I picture all of you reading this on Saturday morning, a cup of coffee in hand, sitting at your kitchen table or in a lounge chair on your deck. Maybe you're still in bed, nursing a hangover, psyching yourself up for 8 hours of your kids' baseball or soccer games in the sweltering heat.

Yeah, I know. About one-third of you read this on Monday morning when you get to work. That's fine too. It's just not as fun to think about that. Over half of the weekly readers bank this thing before 11 am EST on Saturday.

One of my favorite weekend activities is reading all of your replies, dozens usually, often from people I've never met. I respond to everything, sometimes with a brief 'Thanks' or other times devolving into banter or debate about a provocative statement I've made. (No, restaurants should never, ever serve shrimp in a plated dish with the tails still on. So just stop.)

The biggest reason I haven't sold out and published this as a blog or through a larger publication (despite ample pressure to the contrary) is because of the pen pals I've made. A couple people even became some of our largest clients that way. They inquired about our business, unprompted. You can't buy B2B marketing like that nowadays. Trust me, I've tried.

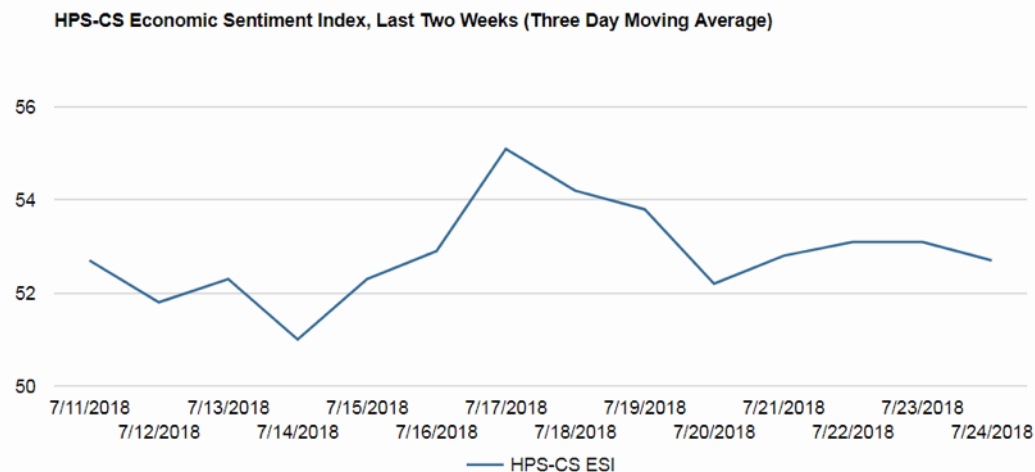
So please keep all of those emails coming. Send me ideas of new things to study or challenge me when you think I'm wrong. It's not always easy to come up with stimulating topics for all of you brainiacs and captains of industry every week. I'm burning through my best personal stories at a torrid pace. Help a brother out.

And enjoy that coffee.

Here's what we're seeing this week:

**Consumer confidence had a modest rebound and – I can't believe I'm saying this – it actually looks like Amazon Prime Day had something to do with it.** Our Economic Sentiment Index [yielded its highest reading](#) on Tuesday, July 17th as

consumers' confidence in their personal finances and major purchase decisions hit their peak. Could the build-up to Prime Day (July 16-17) have been so exciting that millions of people genuinely believed their financial lot would improve as a result? If so, it's just another indisputable sign of Amazon's power.

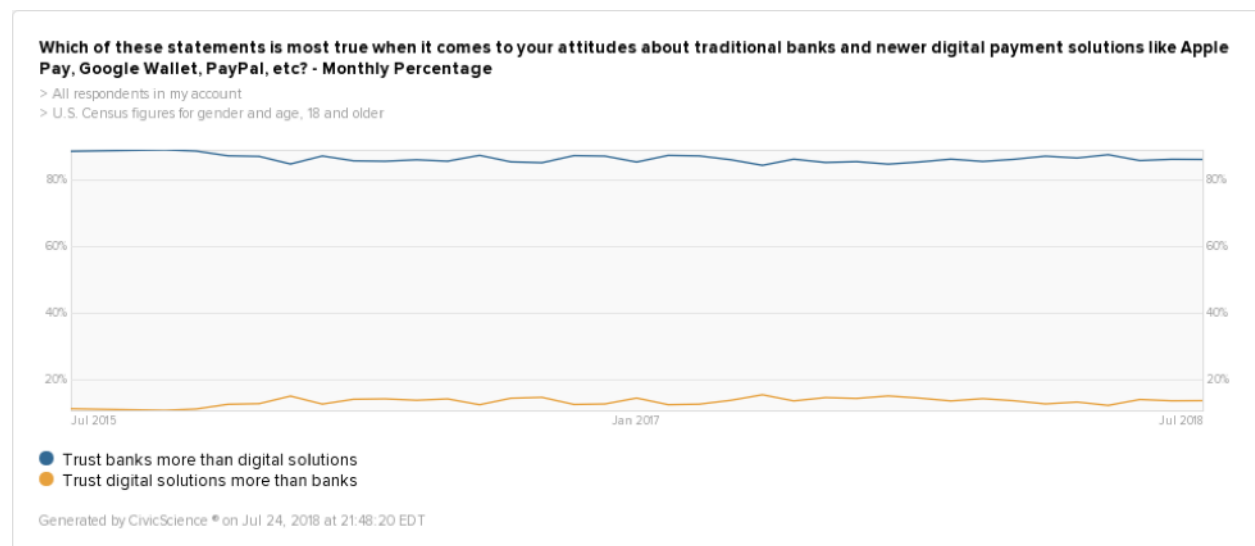


**And yet, Amazon may have botched Prime Day, relatively speaking.** In the days leading up to Amazon's annual holiday, 25% of U.S. adults told us they were planning to participate in the event (which, by the way, is more than enough to move national economic sentiment). Unfortunately, afterwards, [we found that as many as 47% of intended shoppers](#) either shopped less or gave up altogether because of the widespread technical glitches Amazon faced that day. Still, Amazon reported its biggest Prime Day yet, making you wonder how big it could have been. Just wait until next year, when they're building HQ2 in Pittsburgh...

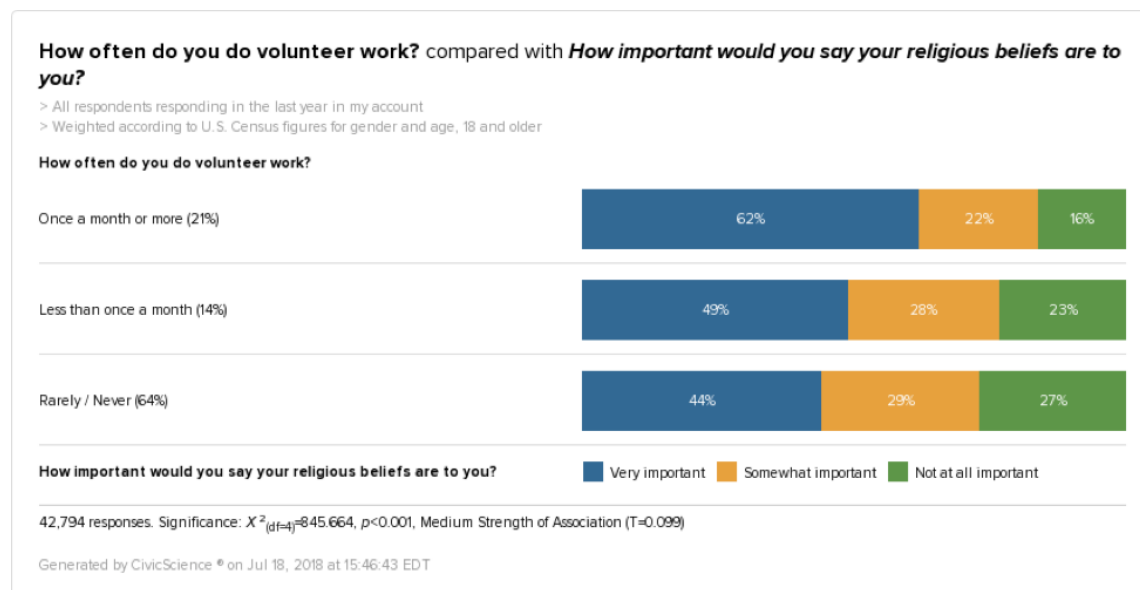
**I have a bad feeling about Snapchat's Q2 numbers.** Yes, I know they're technically called "Snap" now, but I'm getting old enough that people can't go changing their name willy-nilly and expect me to just follow along. I'm not referring to Google as "Alphabet" either. So, get off my lawn. Anyhoo, Snapchat's Q2 U.S. subscriber numbers [look pretty dreadful in our data](#) – almost as if they may have lost net daily active users. Some of the Wall St. pundits are more bullish, so maybe Snapchat made up the subscriber losses internationally. I'm not optimistic.

**Digital payment services are making basically zero progress at gaining consumer trust.** Check out the chart below, which either looks like an inspirational poster to a bank or a mortal EKG to a digital payment company. The numbers haven't moved in over three

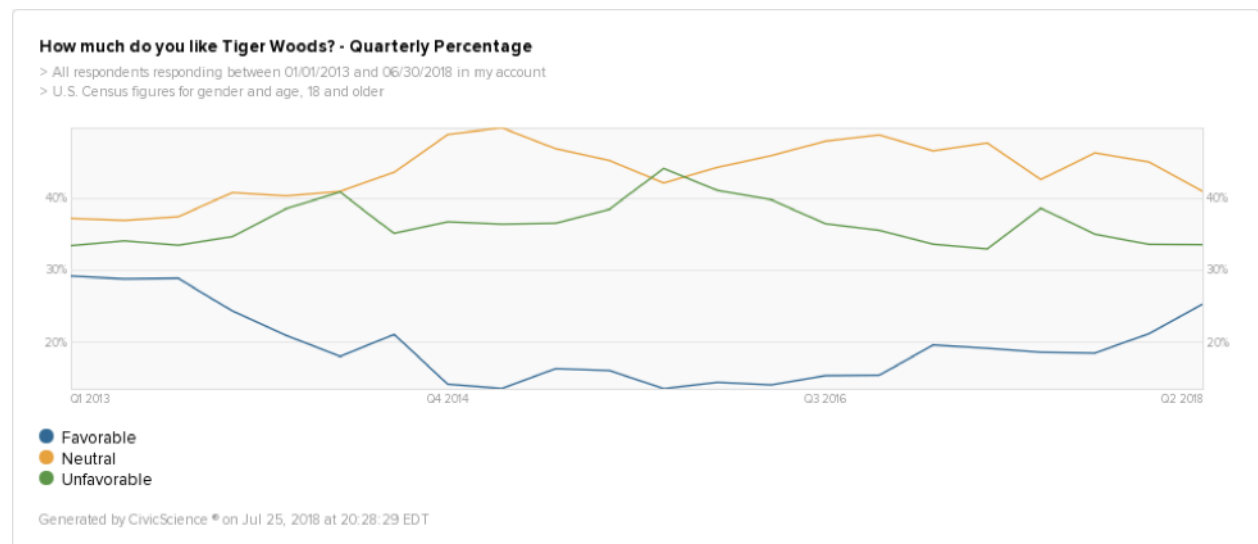
years. I don't think about it very much because the only thing I keep in my digital payment accounts is my fantasy football winnings. And I never win at fantasy football.



**Even if you're a selfish jerk, you should still volunteer for your own sake.** Just under 1 in 4 U.S. adults do volunteer work at least once a month or more, while 64% do none at all. That ratio is pretty sad. While you *should* get off your ass and help others because it's the right thing to do, you could also just do it for yourself. According to [an article we published this week](#), people who do regular volunteer work are significantly happier in life, happier in their jobs, and hold a generally higher self-image. It's also worth pointing out that almost nothing correlates more highly with volunteerism than the importance of someone's religious beliefs. Say what you want about organized religion – but people of faith do good works.



**People like Tiger Woods when he's winning (or getting closer).** Even before his near-epic-win at Carnoustie last weekend, public sentiment toward Tiger Woods was already climbing like a well-struck pitching wedge. While his net favorability still has a long way to go – especially among women – his positives are nearing levels we haven't seen since Q3 2013, which was, not coincidentally, the last time Tiger won a tournament. Americans love winners, often in spite of anything else.



## Random Stats of the Week

Final results from the most popular questions we shared last week:

- 20% of adults say being late for a meeting is a “power move” (Whatever, don’t be rude);
- 31% say they would sacrifice themselves to save a stranger;
- 35% can’t remember what all the light switches in their house do (+1);
- Only 58% of people swim with their heads underwater;
- 73% of couples hold hands in public;
- 25% of people have tried to solve a ‘cold case’ on their own;
- 72% passed their driver’s test on the first try;
- 48% say the top bed sheet should be tucked, 33% untucked, 11% say no top sheet at all;
- 45% say fireworks are overrated.

Those are about as random as it gets.

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 up to God. I was one demeaning comment away from shriveling up, handing him my office keys, and crawling back to my parents' house.

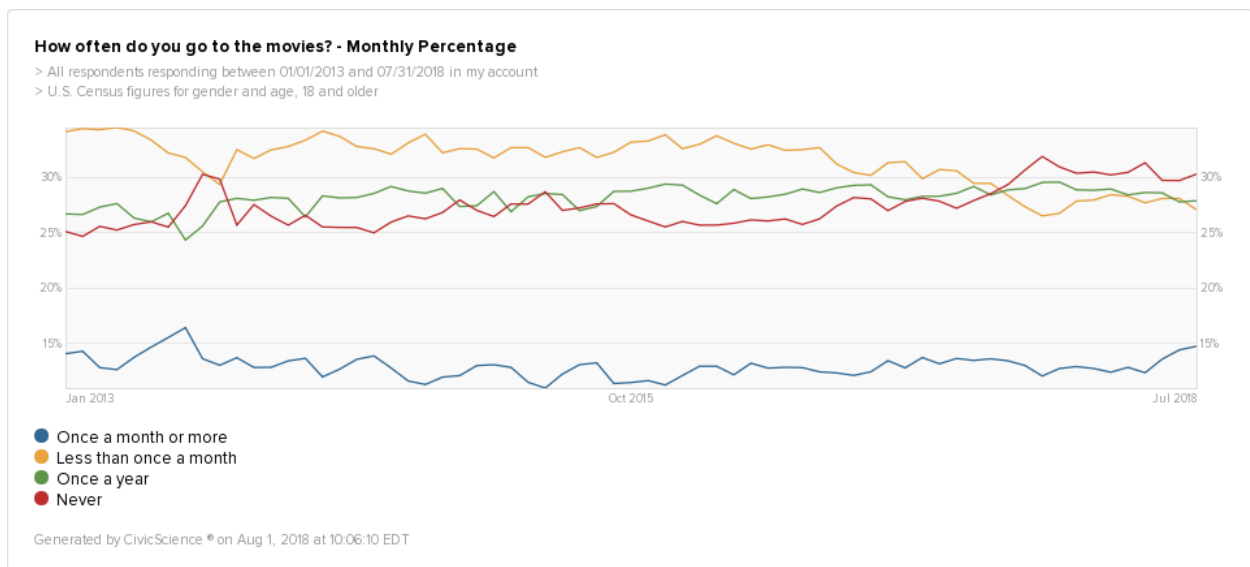
Eighteen years later, I still struggle to see myself as “the boss.” I sometimes forget that I can't just spout off a random idea because someone might interpret it as a directive, drop whatever they're doing, and launch a full-blown company initiative around it. I don't weigh in on product design because 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.

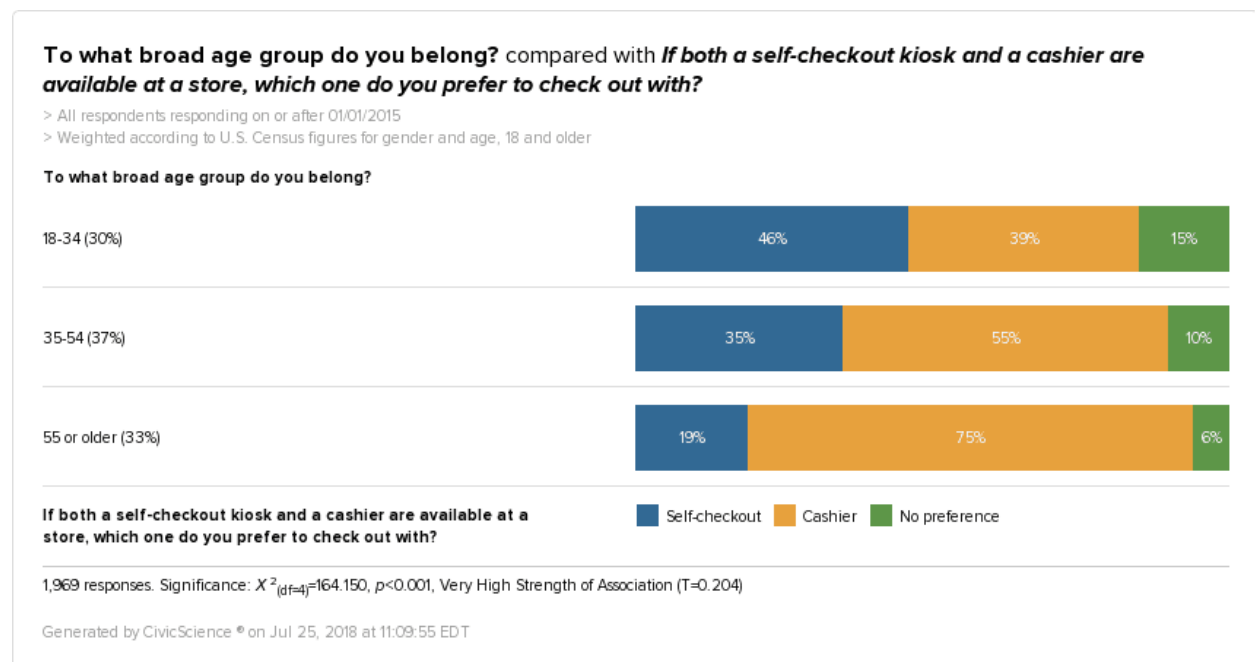


**Just don't spend too much time in the movie theater because it turns out that sunlight is really good for your soul.** Hopefully, that insight doesn't violate your sensibilities – seems like a no-brainer to me – but you can read [a bit of research I did](#) all by myself this week. Short story shorter, 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, whose 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?](#)
- [Is there anything wrong with 'working for the weekend'?](#)
- [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

## Hug a Reporter Today (8/11/2018)

Our fancy new PR firm took me on a tour of the fourth estate this week, getting me acquainted with some journalists we've never worked with before. More on that later.

First, I did [another Cheddar gig](#) from the NYSE – which has become little more than a live-action backdrop for TV. They did ring a bell once, but I'm not sure what else everyone was doing there.

Snap(chat) was announcing earnings that evening and my fellow talking heads and I pontificated on how messy the bloodbath would be. We've been on the hook for weeks, [foretelling](#) of Spiegel-and-Co's first quarterly user loss – even when [bigger names](#) said otherwise. But by Wednesday, nobody was reading happy tea leaves.

I spent the whole day in a state of guilty conflict: Rooting for a company to fail so we didn't get egg all over our face, while knowing that in the startup world, karma is a bitch. You should never wish ill on entrepreneurs, big or small. There's enough success out there for all of us.

But the prediction business is a perverse one. If it bleeds, it leads. Nobody cares when we rave about Amazon or Netflix. They only want to know who will suffer as a result. Why do you think local TV news is full of house fires and car wrecks? People are rubberneckers.

In the end, the best scenario played out for us – at least from a business + karma standpoint. Snap reported its first DAU loss, pretty much on the number we expected. But revenues out-performed, so the stock impact was humane, at least initially. I'm not optimistic long-term but at least I can go back to wishing them well for now.

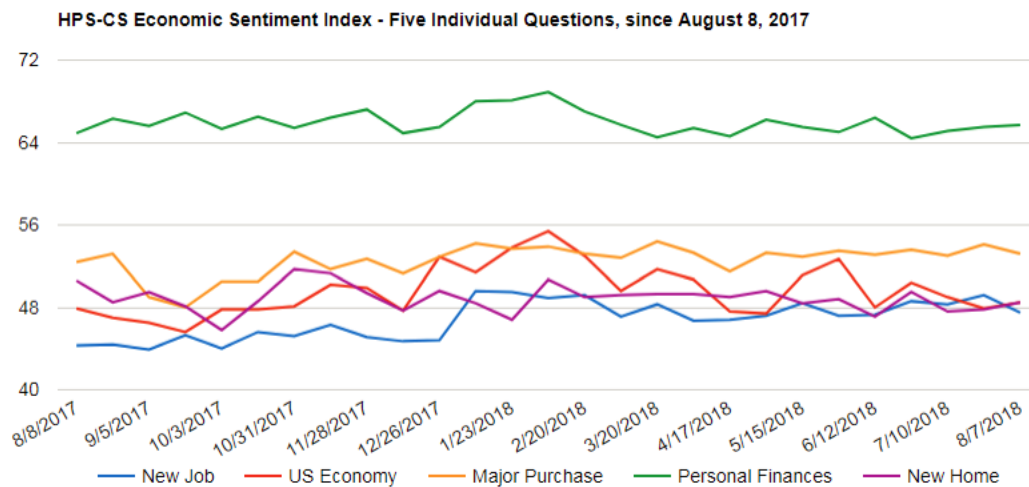
As for the reporters we met, they were all so thoughtful and professional. The “Fake News” hyperbole has convinced laypeople that there are armies of journalists all over the place, making shit up to advance some political agenda. Just like the 90% of scientists fabricating data about climate change for some reason. Ridiculous.

The journalists I know care – no, obsess – about the truth. Even when they're skeptical about our methodology and data, which admittedly gets on my nerves, I know it comes from a genuine desire to be accurate. Most of them aren't paid enough to be beholden to a hidden agenda. Or paid enough at all, really.

Anyway, hug a reporter today.

Here's what we're seeing this week:

**A seemingly-unprecedented thing happened to our consumer confidence numbers...nothing.** Even with a few daily jolts, our Economic Sentiment Index [barely budged](#) over the past two weeks – or basically the whole last month. We would have to go back to pre-Trump days to find this kind of consistency. But it also feels like a bit of a statistical mirage, with gains in one area of the economy off-setting declines in another. Still, after a long run of bi-weekly whiplash, a few weeks of boredom may not be a bad thing.



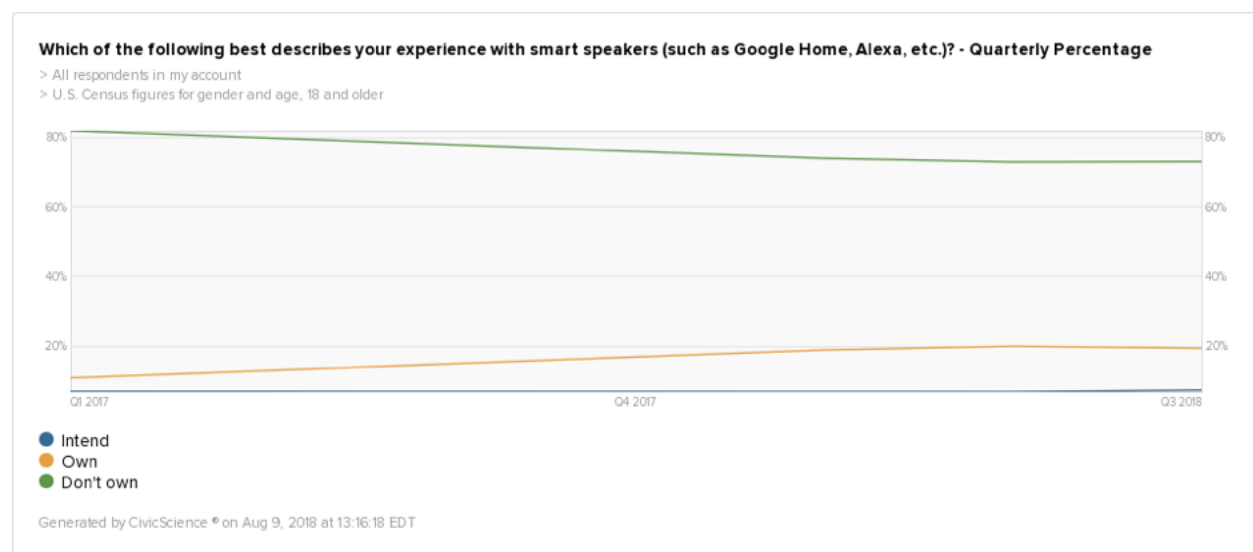
**Investor sentiment, on the other hand, is dragging.** In short, it seems that investors are more concerned than the average consumer about the impact of trade policies and tariffs, even in the face of solid economic fundamentals and a strong Q2 earnings season. If you geek out about this stuff – read what our [partners at PNC Bank have to say](#) – it's over my head.

### **Consumers might forgive companies who raise prices over tariff**

**implications.** Coca-Cola this week was one of the first companies to blame a pending price increase on recent tariffs. We ran a study to see how consumers would react, asking two questions to different but identically-constructed groups. We asked one group if they would buy less Coke products when they increase prices. We asked the other group if they would buy less when they increase prices “due to recent aluminum tariffs.” In short, consumers were half as likely to say they would buy less Coke products when the tariff

qualifier was included. It helps that a) Coke drinkers are less price sensitive than Pepsi drinkers AND b) they are also more likely to be Republican – implying that Rs are even willing to pay more for soft drinks if it validates their party’s economic policies.

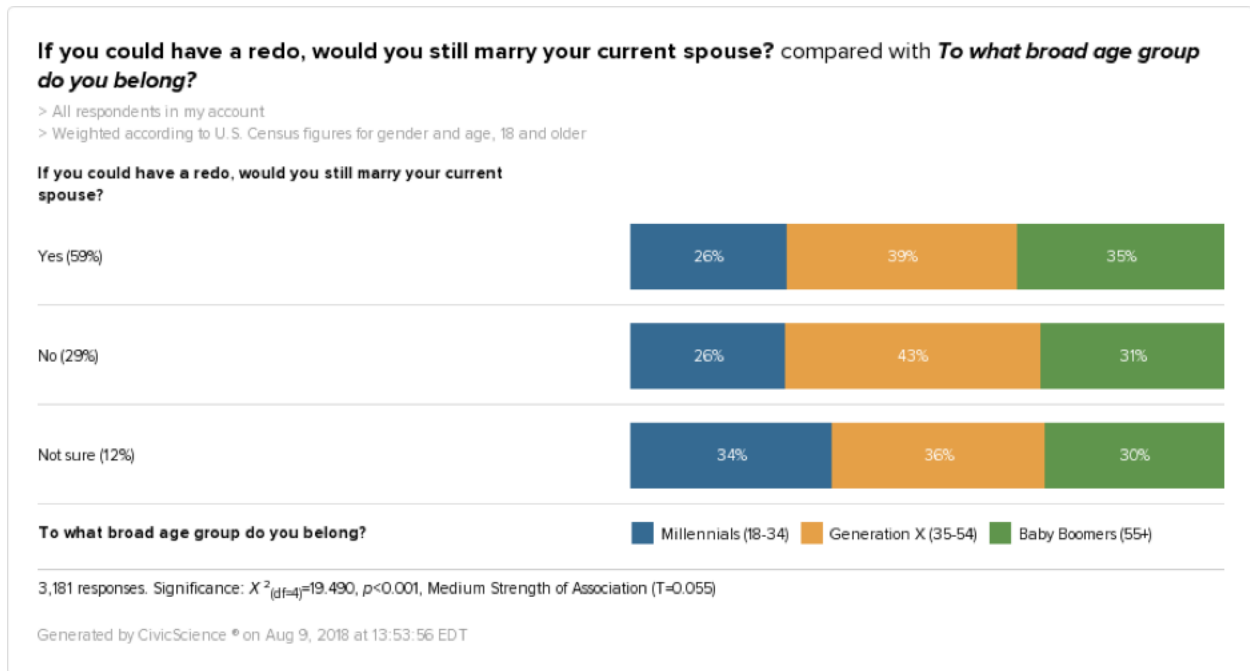
**The trendy smart speaker category seems to have hit a plateau.** I wouldn’t call Amazon Echo or Google Home “bleeding” at the moment, but they do have a scratch. After months of steady growth, particularly through Holiday 2017, category ownership hit a ceiling – incidentally, the same <20% adoption ceiling that’s plaguing Snapchat right now. We did see a tiny bump in the weekly numbers following Amazon Prime Day but not enough to move the needle. One troubling factoid is that the percentage of people who say, “I own one but don’t use it that much” (8%) has surpassed the percentage who say they “plan to buy one” (7%). Something needs to turn that tide.



**Most college grads would go back in time and change their major if they could.** There’s way too much [awesome stuff in this article](#) for me to do it justice here. Just read it. Some of my favorite factoids: People who majored in health & medicine were the most likely to have been pushed into it by their parents. People with degrees in art & humanities were the least likely to find a job in their field. The largest percentage of people who don’t like their major chose it because they were undecided and had to pick something. Anyway, check it out.

**Almost 1/3rd of married people would not marry their current spouse if they could do it all over again and yikes, Tara, I swear it was not my idea to pose that question.** 29% of U.S. adults – [57% of whom are women](#) – say they would like a do-over

on the marriage front. Gen Xers are the most likely to want a redo, by the way. What's the best way to tell if someone is in a regretted marriage? See if they go on dates with each other. People who say they still go on dates with their spouse are over 2X LESS likely to say they want a do-over.



## Random (Chicken) Stats of the Week

- 59% of people say the chicken came before the egg (41%)
- 59% of people prefer chicken fingers over chicken nuggets (41%)
- 59% of chicken eaters prefer the breast, 21% the drumstick, 20% the thigh
- What's with the 59% number?
- 33% of chicken wing eaters prefer Medium, 31% Mild, 29% Hot, 6% Insane
- 44% of chicken wing eaters prefer the drums/legs, 28% flats/wings, 27% both
- 62% of chicken wing eaters prefer ranch, 38% blue cheese

Give me hot or insane drums/legs with blue cheese, please.

Hoping you're well.

JD



## Being a Middle School Girl Is the Worst (8/18/2018)

My youngest daughter is starting middle school next week and I'm not okay with it.

Time flies.

Sure, those of you who dropped your kids off at college this week will tell me I don't know the half of it. And you're right. But the 40% I do know is still hard to swallow.

It's not that I wish she was a toddler again or anything. I love that we can watch Marvel movies together. I can swear in front of her and trust that she'll only repeat it appropriately. She makes perfect crème brûlée from scratch. I don't miss diapers.

But middle school is a game-changer. According to our data, 41% of adult women say they hated middle school, versus only 16% who loved it. I didn't grow up around girls, so I had no idea until our older daughter left elementary school how awful it would be. Then, I started reading about it (Untangled by Lisa Damour was my life jacket if you're ever in the same boat).

Boys are clueless, borderline-Neanderthal creatures and their obliviousness is like a shield. I was — and still am — one of them. Boys have it easy, relatively.

Girls, though, are insightful and affected. And they can be mean — holy cow, can they be mean. They use friendship as a weapon. And social media is the bayonet.

We won't allow Noelle to have a phone or social media until she's 13, which puts her in the minority. It won't protect her. She's a girl with the last name Dick, as if middle school isn't torture enough.

Her sister survived and heads off to high school this year with wind in her sails. But it wasn't a cake-walk, by any stretch.

So, I want to pause time in the worst way. I recently overheard someone refer to August as "the Sunday of months" and I immediately wished I had thought of that because it's spot-

on. Maybe sending your baby girl off to middle school is like the end of Christmas break. You know that a few months of nasty weather and dark days are on the way.

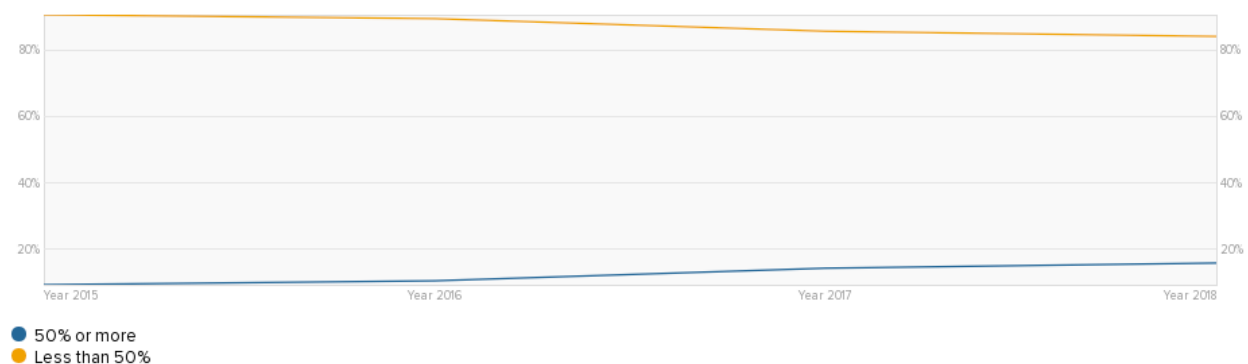
Fortunately, another summer will be here before we know it. Time flies, indeed.

Here's what we're seeing right now:

**While we're on the subject, back-to-school shopping is shifting online at a much slower pace than other areas of retail.** Perhaps it's a popular family outing or the kids just like to touch and wear their new backpacks before buying them. But [in-store back-to-school shopping](#) is still boss by a safe margin. Incidentally, over 40% of back-to-school shoppers hadn't even started shopping before this week. 30% had completed all of it. Count us in the majority.

**What percentage of your back-to-school shopping do you intend to do online this year? - Yearly Percentage**

> All respondents in segment United States (includes PR) in my account  
> Weighted according to U.S. Census figures for gender and age, 13 and older

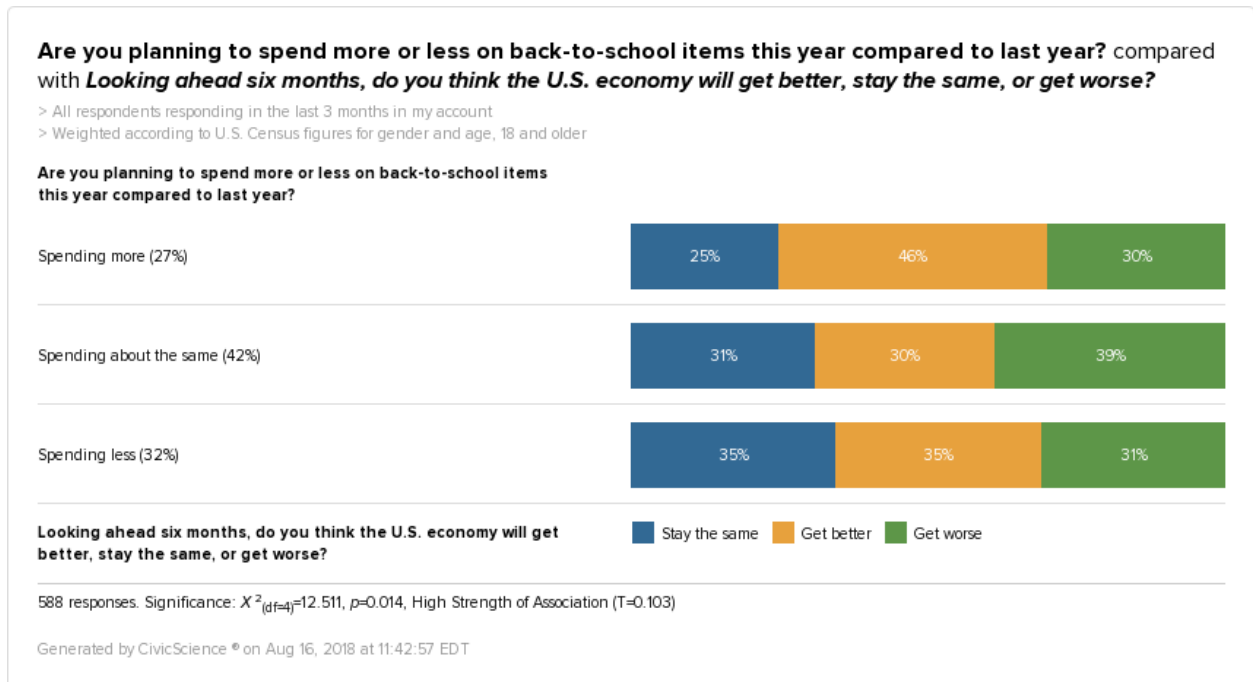


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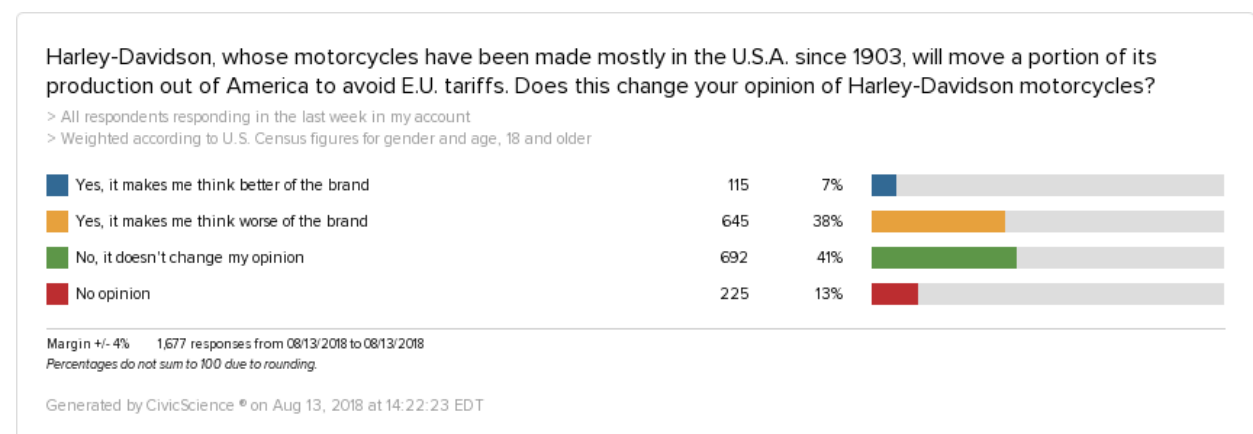
**In more back-to-school news (can you tell I'm obsessed?), consumer confidence should be a harbinger of a healthy retail season this year.** Naturally, people with a more positive outlook for the U.S. economy expect to spend more this year than last. Since we know economic sentiment has been improved comfortably over last year...well, you can do the math.

**People in the U.S. Northeast are the best tipplers — those in the West are the worst.** Hey, don't shoot the messenger, Left-Coasters. [The numbers don't lie](#). Also, Millennials are the heaviest tipplers AND the most likely to not tip at all — though the latter is a tiny percentage. Most people vary their tips based on service but nearly 1 in 4 give the same percent every time. Oh, and 49% of consumers (and even more Millennials) believe

tipping should be rendered obsolete, replaced by better wages for workers. That Danny-Meyer-led trend could catch on — at least until we replace everyone with kiosks and robots.



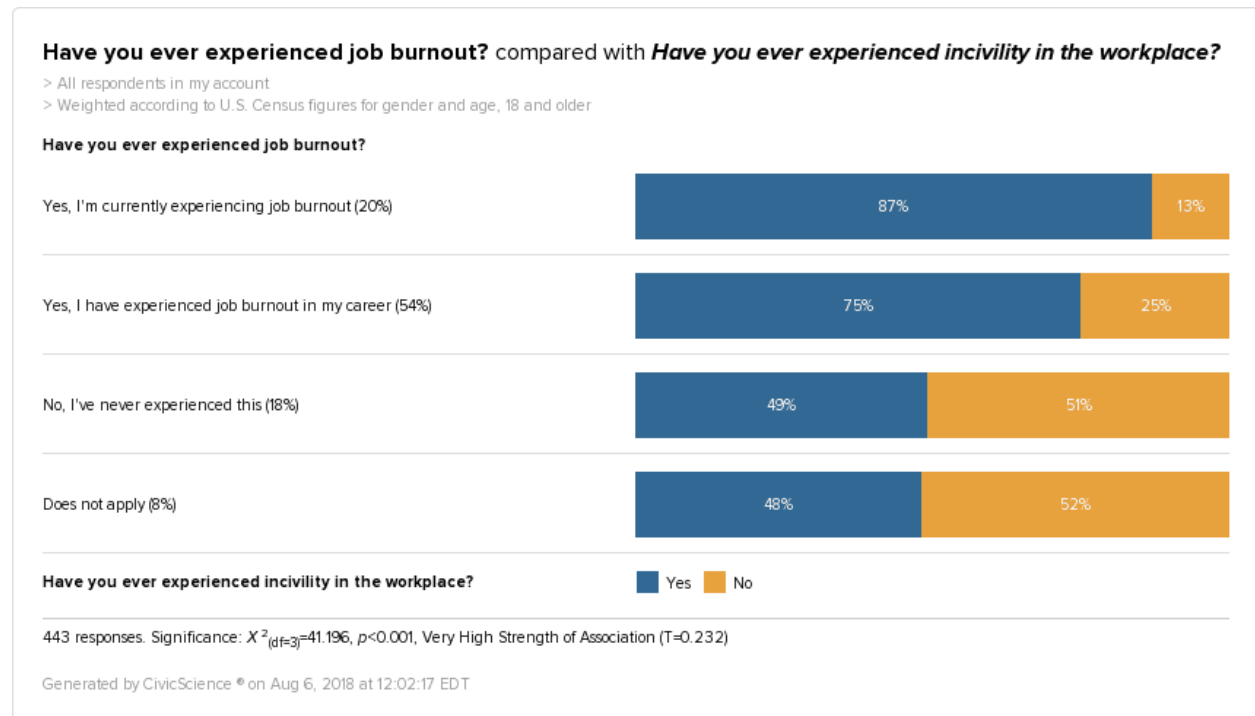
**The President's attack on Harley Davidson last weekend didn't move the needle — because he already moved it.** We wrote about [declining consumer sentiment](#) toward Harley Davidson in late June, after news (and resulting tweets from the Prez) of their decision to move some manufacturing overseas. 38% of U.S. adults said the move worsened their opinion of the brand. We re-ran the question on Monday morning after Trump again fired shots at Harley. Almost uncannily, the numbers were exactly the same. The Trump-Tribe had already made up its mind.





**Vegan and vegetarian products still have a lot of room to grow.** My one kid is a “pescatarian,” meaning the only meat she eats is fish. The other kid is allergic to fish and nuts, so planning a menu around our house is basically the bane of my existence. We go vegetarian from time to time — putting us in [the 25-30% of Americans](#) who would — at least sometimes — cook or order vegetarian/vegan. That’s a far cry from the mere 5% who eat vegetarian/vegan ALL the time, suggesting there might be a larger market opportunity than my bacon-loving self would have ever thought.

**Somehow over 1/3rd of people have never worked with assholes.** We ran [an interesting study](#) this week, asking people whether they’ve ever experienced “incivility” in the workplace. 65% of U.S. adults said ‘yes’ and 35% said ‘no.’ Women were more likely than men to say ‘yes’ — they were also more likely to say that the incivility was from another woman. People in computer/technical/medical fields were by far the most likely to experience incivility at work. The least surprising stat of all: People who face incivility in the workplace are leaps and bounds more likely to be experiencing job burnout. Nobody wants to work with jerks.



### **Some Random (Facial) Stats of the Week**

- 39% of people prefer beards to mustaches (22%) — 39% prefer no facial hair at all
- 45% of men prefer beards, 23% mustaches, 32% nothing
- 32% of women prefer beards, 21% mustaches, 46% nothing
- 34% of women “always” wear makeup, even away from work or social events
- 19% of women use eyelash extensions, false eyelashes, or both
- 6% of Americans have had or would consider having a facelift
- An equal 6% of Americans have had or would consider having Botox injections

You're all beautiful just the way you are.

Hoping you're well.

JD



## We Just Killed Tribalism (8/25/2018)

I'm done using the word "tribalism." It won't be easy. Hardly a week goes by that I don't mention it in this email. I say it 100X more in speeches, client meetings, and daily life. It's everywhere, affecting everything.

It hasn't reached the echelon of over-worn-buzzword yet but it's getting there. That's not what bothers me.

What's unsettling is how the t-word has become a catch-all rationalization for the worst of our behavior. It's the Voldemort – the trend-that-shall-not-be-named – of today's socio-political-economic-cultural landscape.

Last week, the Catholic League [authored a statement](#) to "debunk" the report of systemic child abuse by priests in Pennsylvania. Among their key arguments? That most of "the youngsters" weren't, in fact, raped because "rape" requires actual penetration to occur. Also – which the Catholic League called "the greatest lie of them all" – that many of the priests weren't pedophiles because "pedophilia" requires that the victim is prepubescent. Who knew?

For starters, who still uses the word youngsters? Golly-gee, Mrs. Cleaver. That alone disqualifies them from having a valid viewpoint on the world. The Catholic League can go to hell.

More horrifying is the fact that so many people – [even media types](#) – seized and shared the CL's statement. It provided the drop of acrylic they needed to paint the mainstream media as biased and politically-motivated. It didn't matter what they were arguing FOR, only who they were arguing AGAINST. Your tribe can never be 100% right. My tribe can never be 100% wrong.

Welcome to America 2018.

It's not about right or wrong. It's about my team winning and your team losing. Some days they play offense, other days they play defense. No blood, no foul. Don't hate the player, hate the game. [Insert sports metaphor here.]

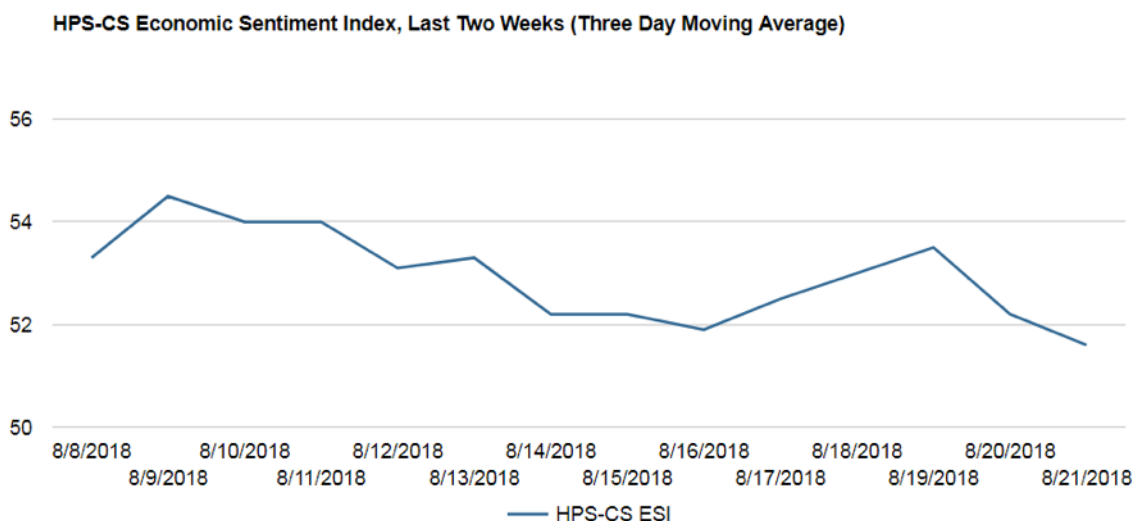
So, goodbye, t-word. Be gone from our vocabulary. The more we say it, the more we validate it. Let's call it what it is – moral and intellectual relativism, driven by our desire to beat the other team at any cost. It sucks.

And it's not how we're supposed to be.

*Climbs down from soapbox...*

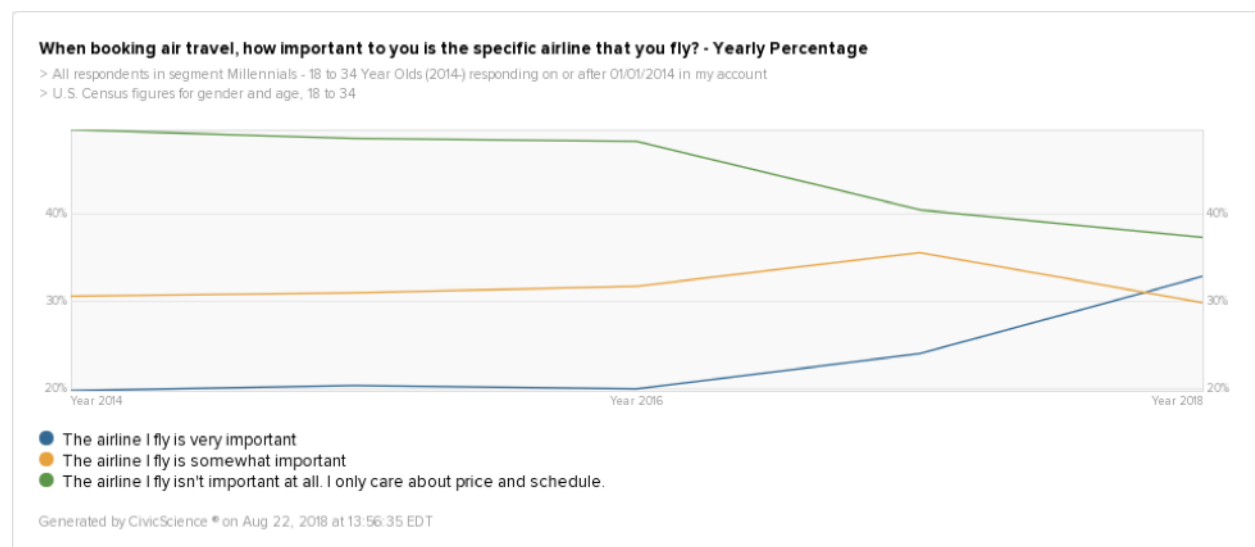
Here's what we're seeing this week:

**Consumer confidence has been eerily stable over the past six weeks.** I'm so used to seeing our index bounce all over the place from one reading to the next; but [this recent run of same-ness](#) almost feels ominous, like everyone is just waiting for the next unexpected twist. Even our three-day average has barely budged – at least until Tuesday (i.e. Michael Cohen Bombshell Day). Maybe that was the inevitable twist. Or maybe it won't mean a damn thing.



**The ripple effects of the NFL's declining fanbase will hit the fantasy football market this year.** This always seemed like a “when” not an “if” question. And now we know. The [composition of fantasy sports players](#) in our database has been changing, with fewer and fewer NFL fans among the segment. For sure, there is still a huge population of rabid NFL fans and fantasy football nuts – count me among them. But it definitely feels like we're on the downward side of the mountain.

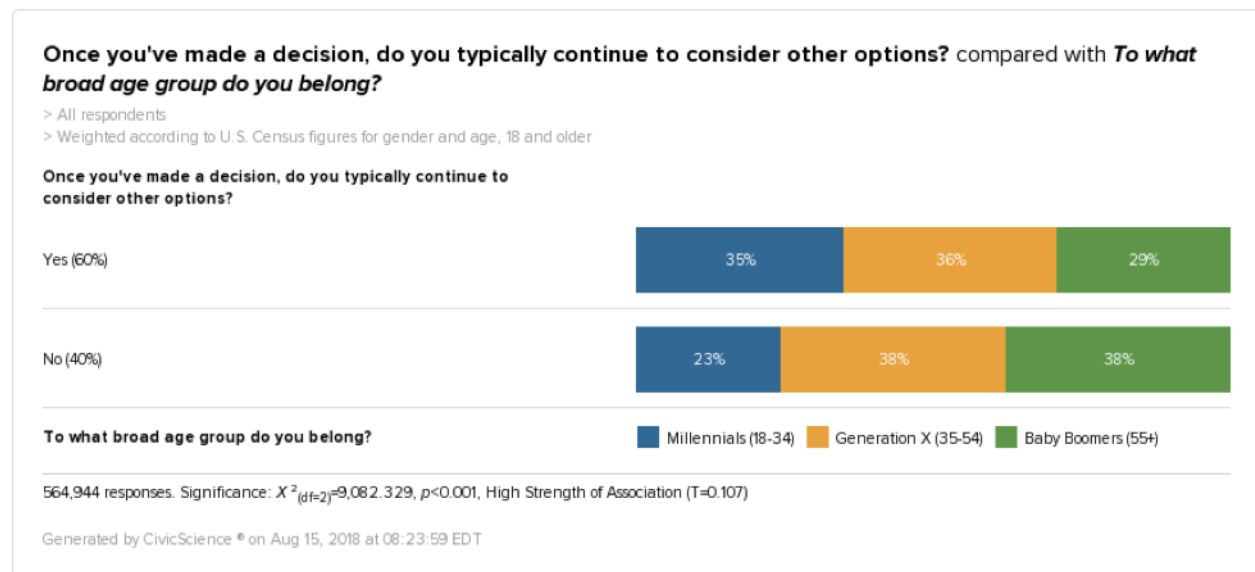
**As Millennials move further into adulthood, it could shake up the airline and OTA industries.** Check out the chart below. Over the past two years, we've seen a meteoric rise in airline brand-centricity and a decline in price centricity among 18-to-34-year-old Americans. The rising tides of consumer confidence had a lot to do with it but Millennials are far-outpacing the rest of the population. As they travel more often, travel for business, or travel with kids, they are placing a higher value on the airline they choose. This could have a big impact not only on which airlines these Millennials fly but where they buy their tickets. Expedia and Kayak, beware.



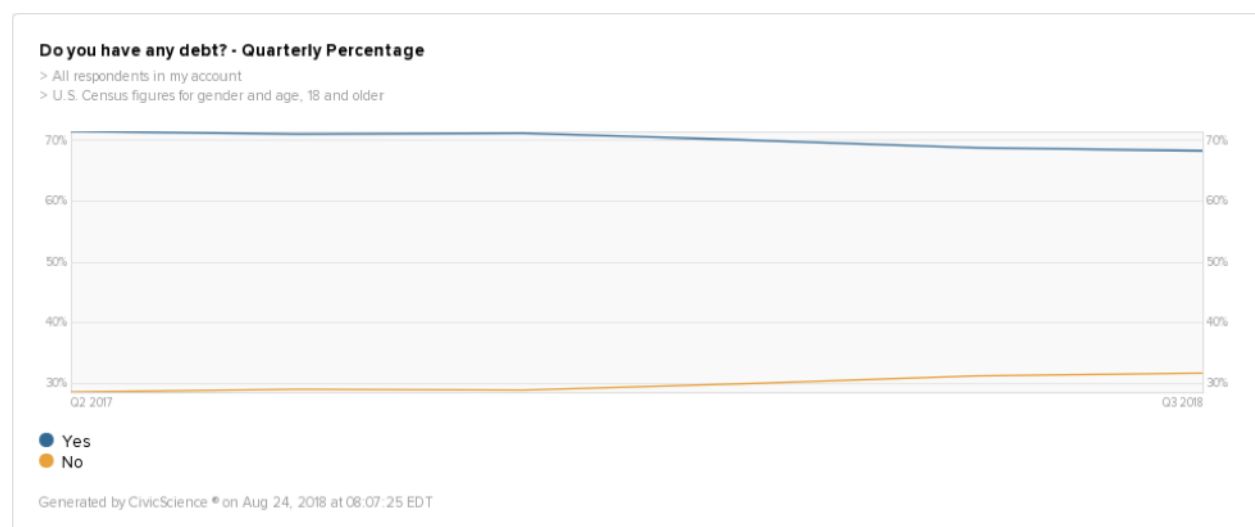
**You can tell a lot about somebody based on which Emmy-nominated TV shows they watch.** As part of a bigger research project we're doing, we delved into some of the more [predictive characteristics](#) of audiences for the biggest shows on TV right now, from *GoT* to *SNL*. A few worthy findings: Rich people watch *The Crown*, music-lovers watch *SNL*, and people who are in therapy watch *This Is Us*. Social outcasts – like me, apparently – don't watch any of them.

**Men are more decisive than women but also more likely to doubt the decisions they've made.** This is [one of the most interesting pieces of research I've seen](#) from our team in recent memory. We analyzed how different types of people make and reevaluate their decisions, and the insights were fascinating (behold, the half-million-person sample size). Among many thought-provoking nuggets, Millennials are much less likely than prior generations to be resolute in their decisions. Fear of better options or FOMO, per the cool kids, has a major influence on their psyche. But it also contributes to significantly higher

rates of stress. Women, meanwhile, are more likely to stress about a decision they have to make but much quicker to move on once they've made it. I wish...



**Ending things on a positive note, the percentage of Americans who report carrying some form of debt has been declining since 2017.** It's only a 3% drop, but it's non-trivial for something that has otherwise barely moved since we started tracking it. Gen Xers, those with a college degree, and parents are the most likely to have debt. Credit card debt is the most common, followed by mortgage loans, auto loans, student loans, and home equity. But it appears that at least some Americans are using their tax refunds and economic tailwinds to climb out of debt altogether.



## Some of Our Most Responded-To Questions of the Past Few Weeks

Many of you have told me how much you enjoy these, so I'll make sure they're part of the rotation. Here are the latest ones (*just click to answer them and see the results*):

- [Do you have a strong distaste for any of your friend's partners?](#)
- [Do you think election days should be federal holidays?](#)
- [Do you do the bulk of your spouse/partner's laundry?](#)
- [Do you have any friendships you've been meaning to revive?](#)
- [Have you ever had an incompetent landlord?](#)
- [Is it rare for you to have uninterrupted silence?](#)
- [Do you wish you could still go to a video rental store to browse new releases?](#)
- [Do you consider being outspoken a good or bad thing?](#)

Have fun with those!

Hoping you're well.

JD



## I'm Sorry You Get So Many Emails (9/1/2018)

I really don't envy all of you VIPs. How many emails, LinkedIn messages, and phone calls do you get from people trying to sell you something every day? It must be awful.

At least a dozen people hit me up on an average business day and I'm nobody compared to you. I used to respond to all of them – for karma's sake – but now I'm drowning.

It's particularly annoying when people do zero homework about me or my business. Do most CEOs oversee software outsourcing, HR services, and trade magazine ads? If they do, I'm a total slacker because I don't do any of that here.

Or these:

- The lead-gen gurus asking me to connect them with the best person in my company to discuss their services. If you're that awesome at sales, shouldn't you be able to do that on your own?
- The survey panel companies selling access to their network of paid panelists. We not only compete with you – we actively disparage your methodology. It's literally front-and-center on our homepage.

Two years ago, I banished cold-calling at our company. At best, it had an extremely low probability of success. At worst, it was doing inestimable damage to our brand by getting on people's nerves. If you want to make sure I NEVER buy your shit, call my cell phone over and over again. I don't care if you're peddling half-priced Hamilton tickets. You're dead to me.

To all of my client-side friends, I apologize for my fellow vendors and business-starters. Most of us believe deeply in our capabilities and genuinely think you would be better off with them. Nobody likes being a pest or having emails ignored but payroll and sales quotas need to be met. Investors need to be satisfied. I know that's not your problem. Sadly, there's just no better way.

For now, I'll just keep writing this email every week and hoping something piques your interest. I'll take your call, I promise.

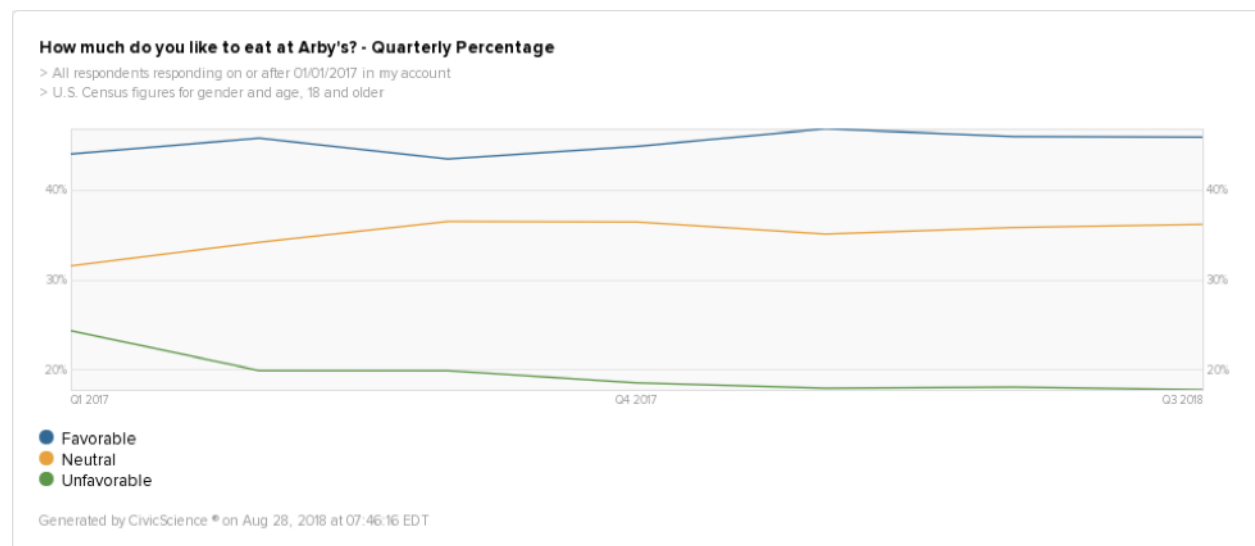
Especially if you have cheap Hamilton tickets.



Here's what we're seeing this week:

**The idea that Google is rigging search results for political reasons is asinine, just stop.** We have so much data to explain why left-leaning content might percolate to the top of search rankings, it would take me three Saturdays to write about it. Just know that most Americans are not right-leaning, relatively speaking. The right-leaners only tend to vote more regularly and organize better – and use the internet less. You know Google is too smart to let politics get in the way of the rocket ship they've built.

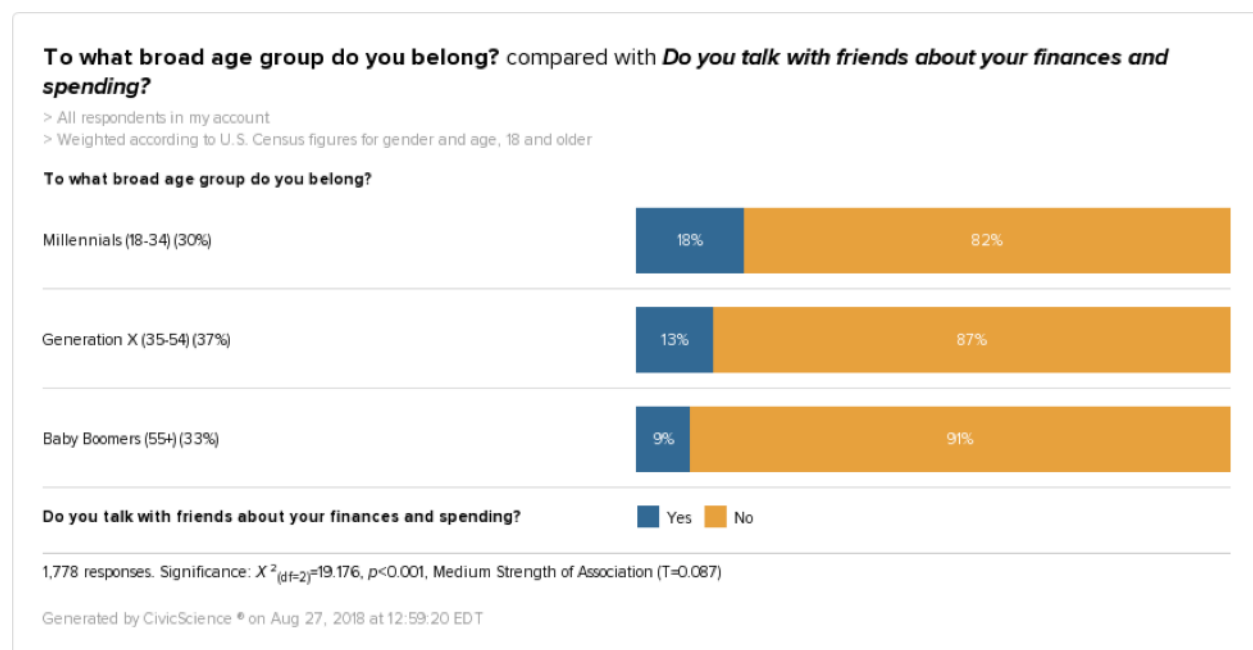
**One company that's smarter than you realize is Arby's.** It wasn't long ago that the only time I heard Arby's name was when Jon Stewart skewered them regularly on *The Daily Show*. And, when they went public with their Ving-Rhames-voiced "We Have the Meats" campaign, most people laughed it off. Then the company rattled off 25 straight quarters of same-store-sales growth. Did they win over a ton of new fans? Maybe a little. But they definitely locked down the fans they do have and steadily chipped away at the stigma surrounding the brand. One thing that's certain in our brand data today: It's more important to NOT be disliked than to be loved. Love is fickle. Hate is forever. (PS– Arby's gyro is killer. PPS– No, they're not a client.)



**Don't jump to any conclusions about Amazon's initial success with Whole Foods, at least yet.** Bloomberg published a provocative [article](#) this week citing data that Whole Foods is stealing foot traffic from Trader Joe's and others. Our data seems to confirm that. But we also think [the results](#) have been more mixed. While favorability toward the brand has indeed climbed in the past several months, so too has negative sentiment. It seems

that new people are walking into Whole Foods but not everyone loves it when they do. Does that matter? See: Arby's.

**Millennials are more likely than past generations to talk about money with their friends.** One interesting outcome of the social media age could be that younger people are just more comfortable sharing everything. Millennials are over twice as likely as Boomers to talk finances with their peers. It's still a small group, but it could unlock new opportunities for banks and investment firms to harness the evangelism of their happiest customers. Incidentally, [the same study](#) found that 19% of married couples don't talk about money with each other. That's a disaster waiting to happen.



**News Flash: People are much more likely to like their boss if they're paid well.** When your team starts publishing a string of studies about [unkindness in the workplace](#) and [asshole bosses](#), it does make you a little paranoid, I must admit. The good news is that 58% of people (more here, I hope) like their direct manager "a lot." The bad news is 42% don't. Women are more likely to dislike their boss, as are Baby Boomers. People in operations or sales gigs have the least favorable opinion of their managers. And, in the least-surprising-data-ever department, the higher income people make, the more they dig their manager. Money can buy admiration.

**Minimalism is an important emerging trend to watch.** You should [read this little study](#) for yourself – or just take my word for it – but over 1 in 3 U.S. adults either currently

consider themselves a minimalist (10%) or aspire to be one (25%). This is particularly true among women and Millennials, driven largely by environmental and economic concerns. Given that those are the two biggest and most important consumer groups in our country right now, I probably should have made this the first topic of this email, not the last.



## Some Random Labor Day Stats

- 63% of people consider summer to be over after Labor Day;
- 44% say the best part of Labor Day is the extra day off;
- 21% say the best part of Labor Day is the short work week after;
- 26% of people did some binge-watching last Labor Day weekend;
- 60% of people say they're ready for it to be fall.

Whatever you're doing this weekend, I hope it's awesome.

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.

**Do you belong to any websites or online panels where you regularly answer surveys for rewards or fun? compared with *Colin Kaepernick was chosen as a face of Nike's 30th Anniversary 'Just Do It' campaign. Do you support Nike's decision to choose him?***

> All respondents in my account

> Weighted according to U.S. Census figures for gender and age, 18 and older

**Do you belong to any websites or online panels where you regularly answer surveys for rewards or fun?**

Yes I currently belong to one or more (14%)



No, I currently do not (86%)



**Colin Kaepernick was chosen as a face of Nike's 30th Anniversary 'Just Do It' campaign. Do you support Nike's decision to choose him?**

■ Yes ■ No ■ No opinion

1,380 responses. Significance:  $\chi^2$  (df=2)=10.128,  $p=0.006$ , Medium Strength of Association (T=0.072)

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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.

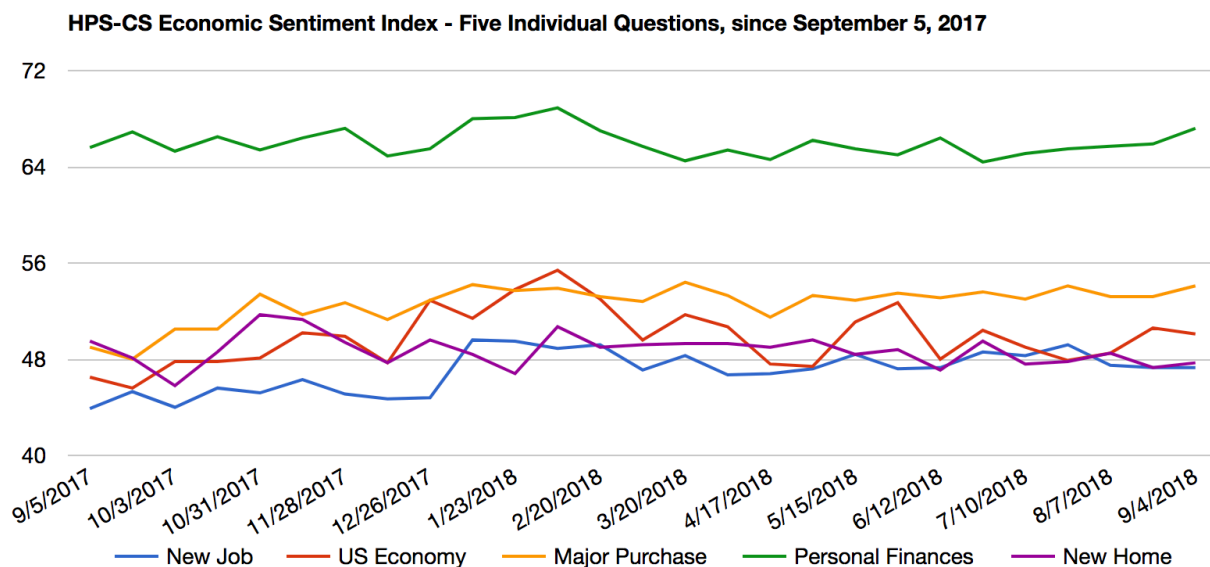
Sorry to go all inside-baseball on you. But that's how the sausage is made.

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 [reached its highest point](#) 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 [I've told you a million times](#) 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.

**To what broad age group do you belong?** compared with **When it comes to trying or considering new technology products, which of these would you say is most true about you?**

> All respondents in my account

> Weighted according to U. S. Census figures for gender and age, 18 and older

**To what broad age group do you belong?**

Millennials (18-34) (30%)



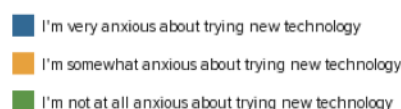
Generation X (35-54) (37%)



Baby Boomers (55+) (33%)



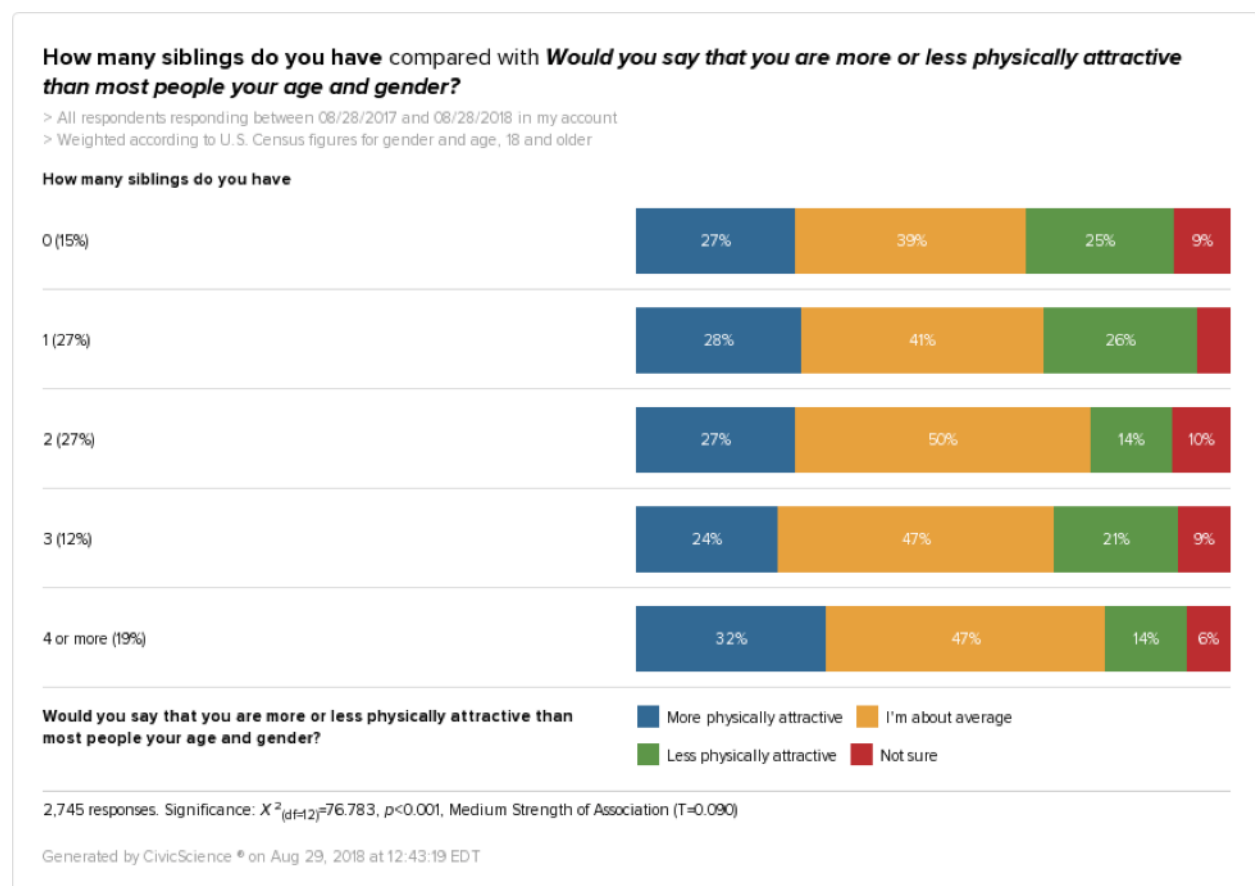
**When it comes to trying or considering new technology products, which of these would you say is most true about you?**



2,080 responses. Significance:  $\chi^2_{(df=4)}=8.616, p=0.071$

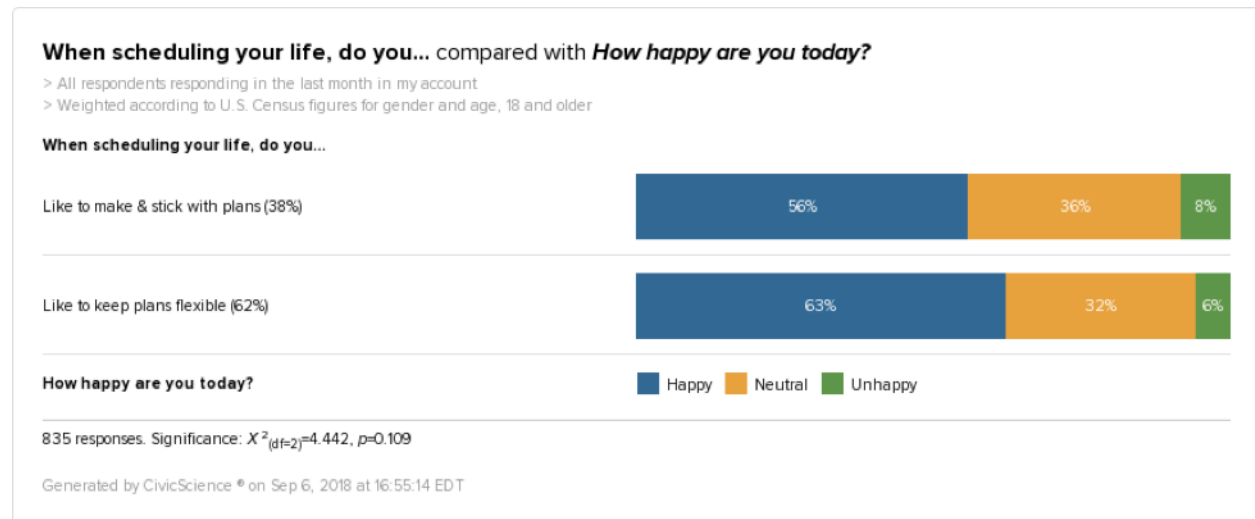
**And no, we don't think Nike is going to suffer long-term over any kind of boycott but it's too early to be sure.** Our friends at the [NPD Group](#) would tell you that 66% of Nike buyers are under 35 and 45% are under 25. Then there are Gen X athleisure moms. Sound like a bunch of Trump supporters? 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.

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

Hoping you're well.

JD





## Generation X Will Save the World, Or Steal It (9/15/2018)

When I was broke in college, I would walk into fast food joints and tell them they forgot an item from my drive-thru order. They just handed me whatever I wanted, every time, without fail.

Was it stealing? Yes. And I'll answer to St. Peter for it someday. But I needed to eat.

Tara and I used to set all of our clocks ahead to convince our kids it was later, so they would go to bed and we could watch primetime Steeler games in peace. Worked like a charm.

Was it lying? *Of course.* But it's the Steelers.

And those aren't even [the most conniving stories](#) I have.

Gaming the system may not be a uniquely-Gen X proclivity but my 40-to-50-something sisters and brothers are the masters. We were latchkey kids, told we would amount to nothing, victims of divorce rates never seen before or since. We had to find our own way. Nobody taught us much respect for the rules.

If you've never read Neil Howe and William Strauss, [you must](#). They coined the term Millennial but don't hold that against them. They also discovered that generations follow a consistent four-archetype pattern, where each cohort is a predictable byproduct of its predecessors. It's uncanny.

Generation X is the archetype of pragmatics, revolutionaries, and entrepreneurs. George Washington and JD Rockefeller, long ago. Bezos and Hastings, today. The shrewdest of people who broke the rules and altered the future.

Conventional wisdom says that Millennials are today's disrupters, the cord-cutters.

But are they? Our data say otherwise.

Gen Xers revolted against the cable bundle first, because we pay the bills and we know a rip-off when we see it. Many Millennials will never know the tether of a cord.

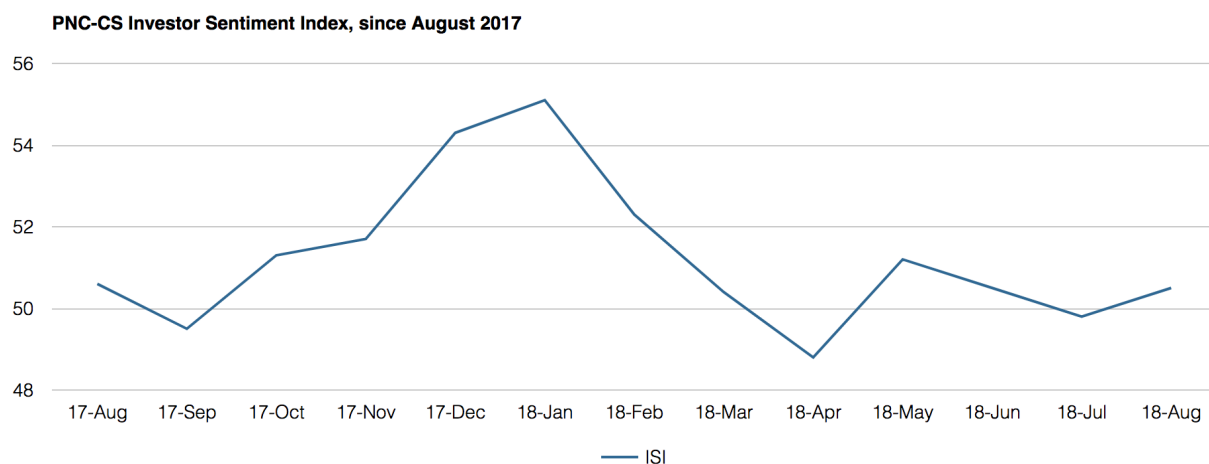
Millennials may have put the nail in malls and video stores but Gen X built the coffins. We stopped feeding our kids high-fructose corn syrup and Pop-Tarts; instead, hummus and kale chips. Millennials will only know a world where that's doctrine.

Marketers are obsessed with Millennials and Baby Boomers, as they should be. They dwarf Gen X in size. Boomers are blowing every last penny on their way out the door and Millennials will have unprecedented spending capacity one day.

But don't sleep on Gen X. What we lack in numbers, we make up in cunning and resourcefulness. If the world undergoes titanic changes in the next decade – and it will – expect Xers to drive it. Mark my word.

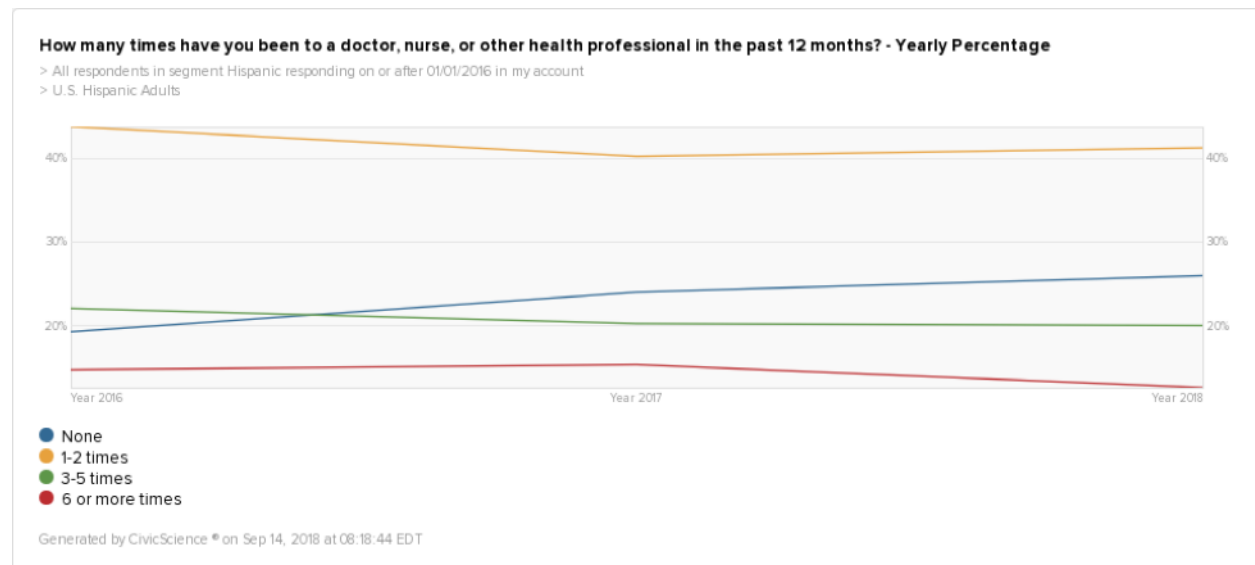
Here's what we're seeing right now:

**Investor confidence jumped a bit in August.** It was the first our index stopped sliding in a couple months but still far from the high watermark in January. The smart people at [PNC did a much better job of explaining why](#) than I ever could. Something about wage growth and tight labor markets.



**U.S. Hispanics are even afraid to go to the doctor.** I read horrible stories yesterday about Hispanic families in the Carolinas who weren't going to hurricane shelters, for fear of being deported or separated. If that doesn't bother you, I don't know what to say. We saw changing consumer behavior among Hispanics immediately after the 2016 election – they largely withdrew for a period of time – but it appears to be affecting healthcare too. Overall, doctor visits among U.S. Hispanic adults are way down, while the number who say they haven't visited a doctor at all are way up, at a rate nearly 40% higher than the general

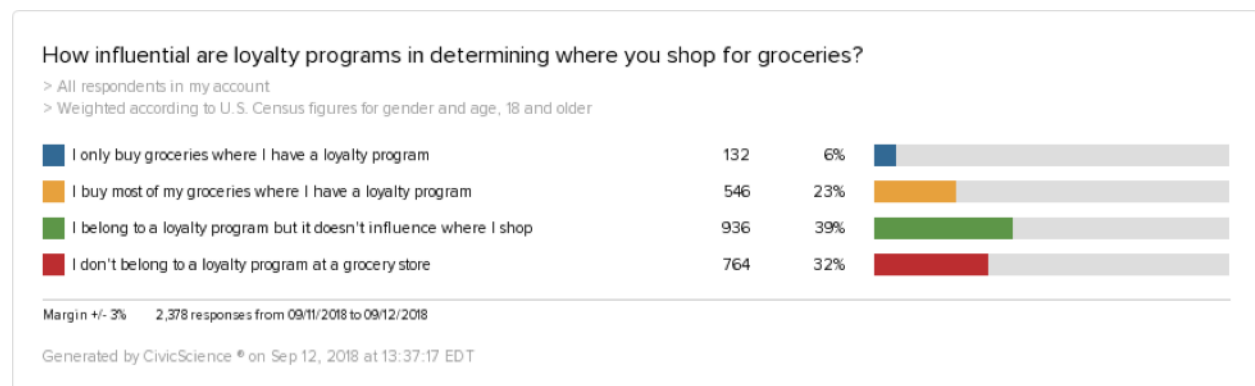
population. Maybe they're all just getting super-healthy all of a sudden, you say? Umm... no.



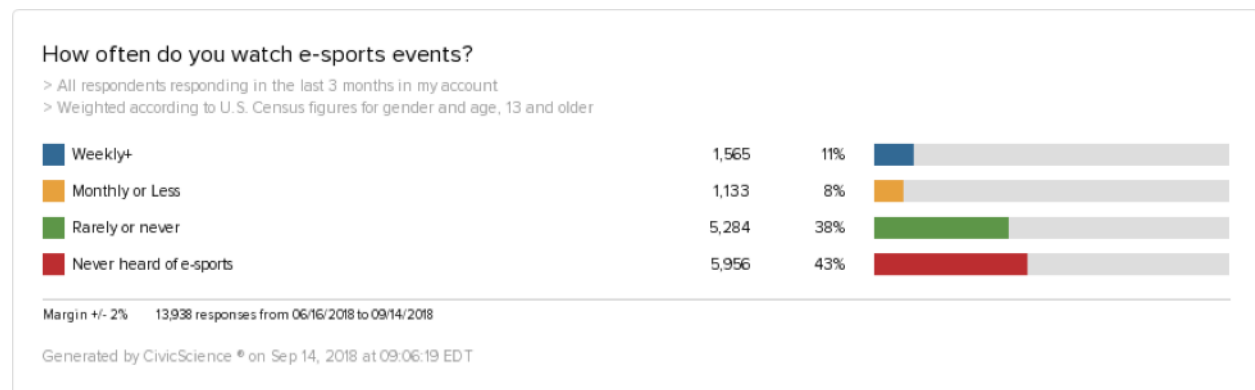
## Even on their phones, people still prefer retailers' websites over mobile

**apps.** Nobody reading this will be shocked to hear that mobile retail is on the rise. Duh. But [it's interesting to see](#) how much the use of retailer-specific apps is increasing. 43% of U.S. consumers say they have at least one retailer app installed on their smartphone. Most interesting to me is that even among people who have installed a retailer's app on their phone, the majority still say they use the retailer's mobile site more frequently when shopping. Sounds like a user experience problem to me.

**Loyalty programs – at least in grocery retail – don't necessarily breed loyalty.** A friend asked me to look into this topic and the results weren't what I expected. In short, well over half of people who have a loyalty program from a grocer DON'T let it influence where they shop. That said, Millennials are much more likely to only shop where they have a loyalty incentive. Maybe that means the trend will grow over time. Or maybe it will reverse as Millennials' price sensitivity decreases with age (and rising income).



**People like to watch other people play video games and I was apparently a huge trendsetter in college 20 years ago.** Over 11% of Americans aged 13+ watch eSports on a daily or weekly basis, up from 8% just a year ago. That number jumps to 22% among Gen Z. I can't even estimate the number of hours (millions?) I spent watching my fraternity brothers play "Madden" (after I invariably lost) back in the day. I was really ahead of the curve. Incidentally, eSports' viewership is off the charts among Hispanics, perhaps due to the fact that they're afraid to leave the house, even to see the doctor. Sorry, that whole thing pisses me off, if you can't tell.



## Some Random (Dancing) Stats of the Week

- 34% of Americans say they don't dance, 66% do
- 44% of people don't like to dance, meaning 10% do it anyway (+1)
- 31% of people have danced for fun in the past month
- 35% of people have taken a dance class at some point in their life
- 11% say they have a signature dance move
- Best 80s Dance Movie: "Dirty Dancing" 41%, "Footloose" 24%

I hope you get to dance for fun this weekend. Unless you hate it, then I hope you don't.

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.

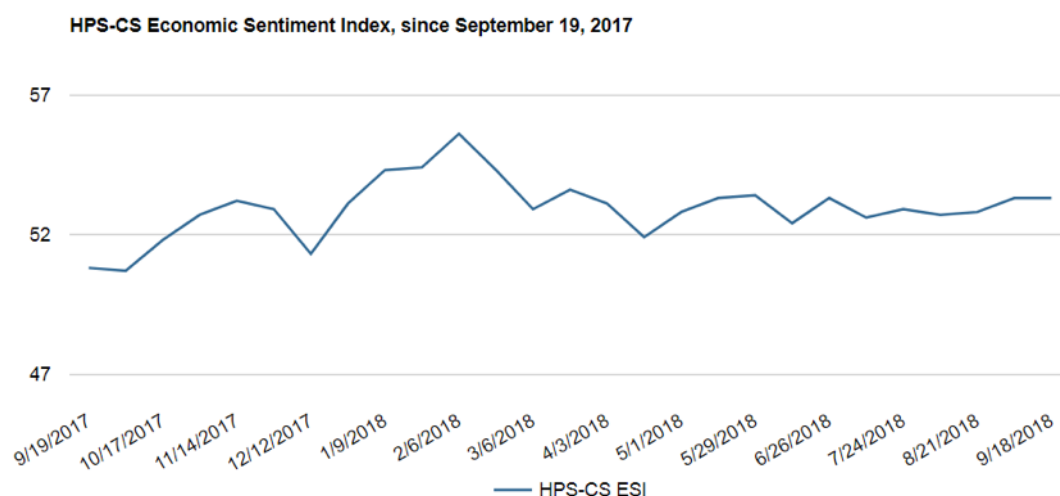
The idea of failing doesn't scare me. The idea of all those people thinking I failed *them* terrifies the living shit out of me. It's in the back of my mind every day and every insomnia-laden night.

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.

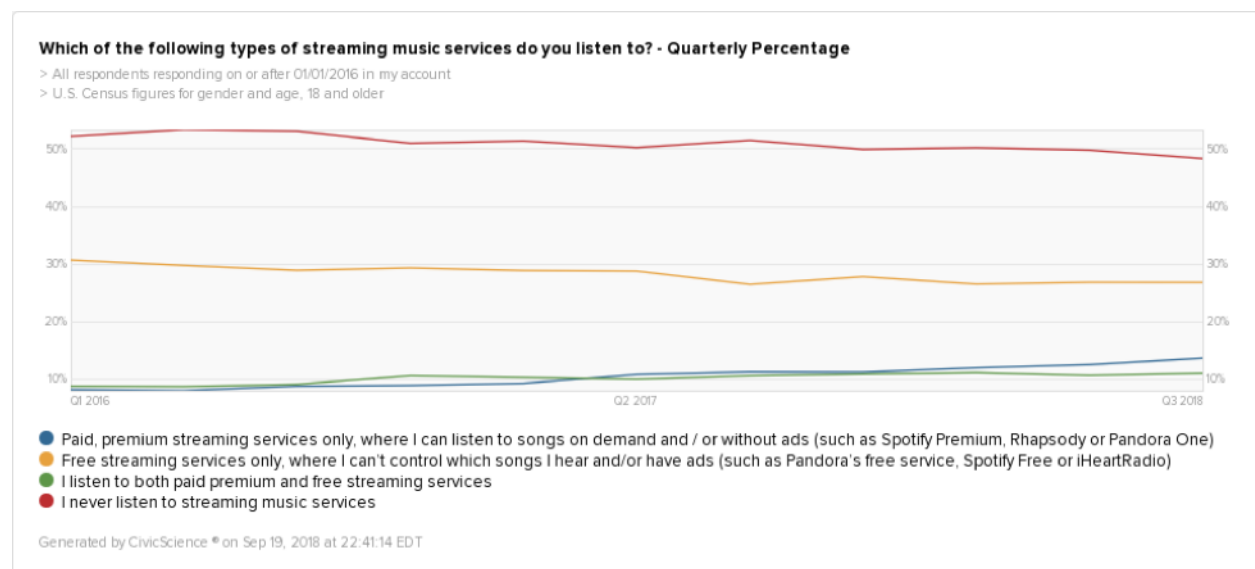


**Widespread student debt is shaking up the housing market.** There's a cute little narrative that says Millennials are renting apartments instead of buying homes because they like to be more urban and more mobile, with a smaller carbon footprint or whatever.

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



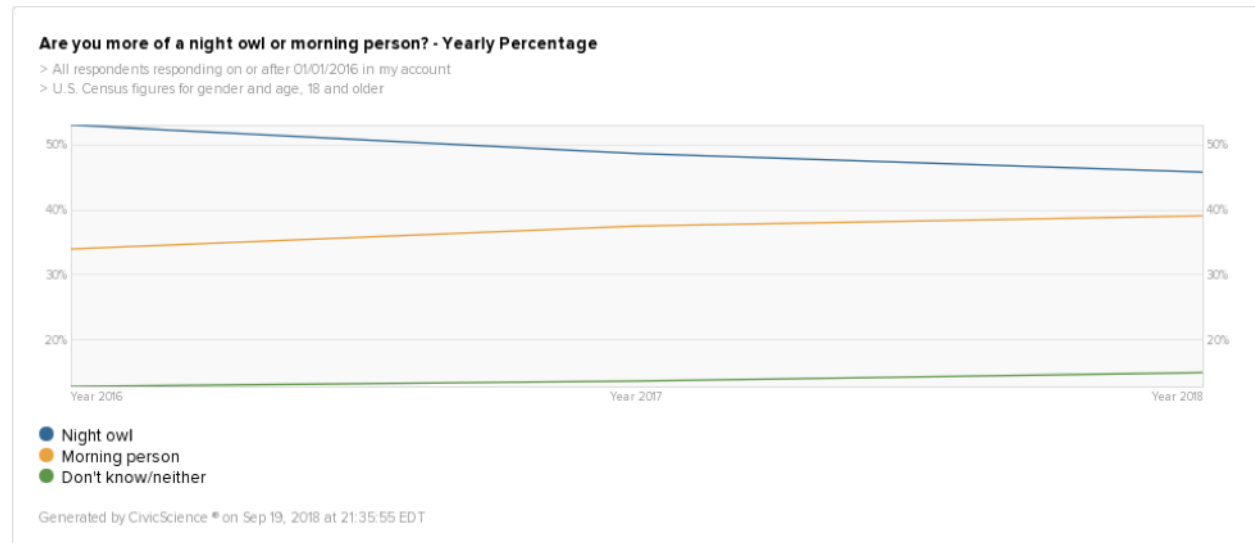
losing share as a result. So is broadcast radio, but you already knew that because you haven't been asleep for 20 years.

### **Meanwhile, personal budgeting apps like Mint are still waiting to go**

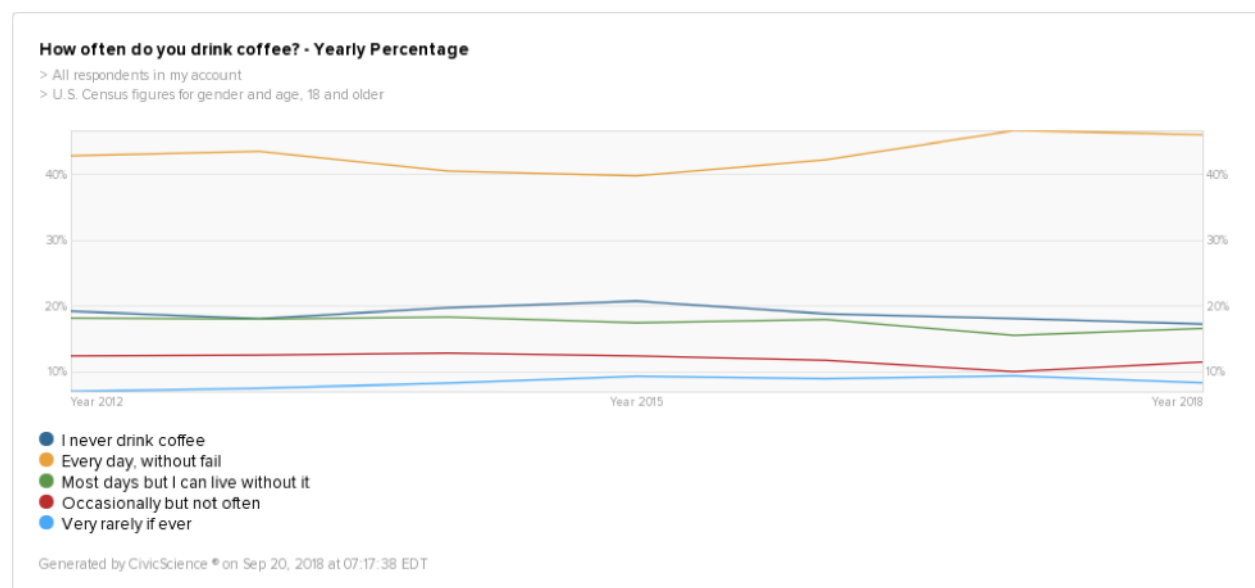
**mainstream.** Get used to me talking a lot about our new model for studying and predicting new product/tech adoption, which we're unveiling at a conference next month. Personal finance apps like Mint or Acorns, for example, are [mired in a low stage of adoption](#) (about 6%) with only another 6% in 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?
- Is it rude to bring a bottle of wine you brought to a party back home with you if it was unopened?
- 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.'

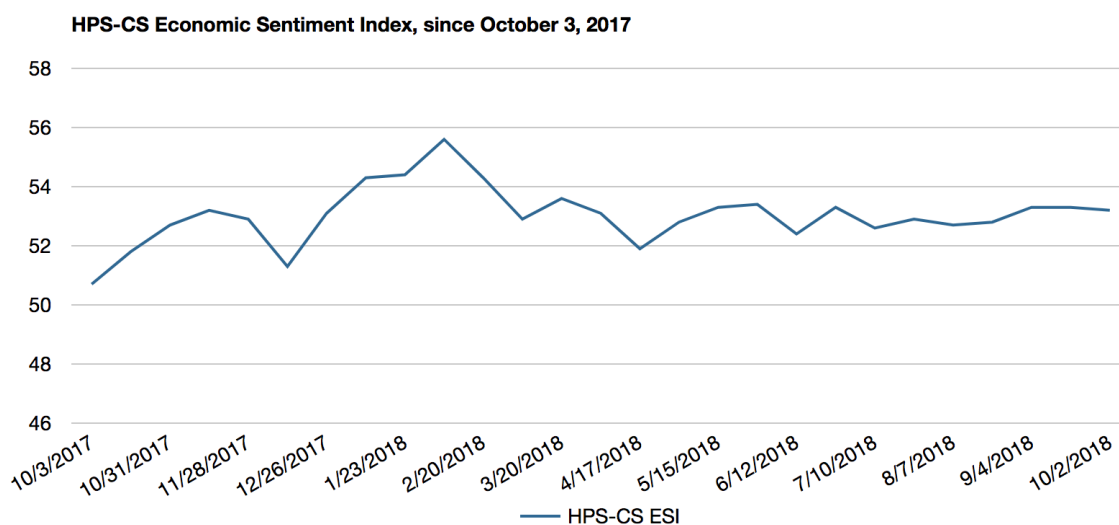
If you read this email regularly, you know we don't touch things like the Kavanaugh controversy. I have no idea who's telling the truth and who isn't – and like I always tell you, we're in the truth business.

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:

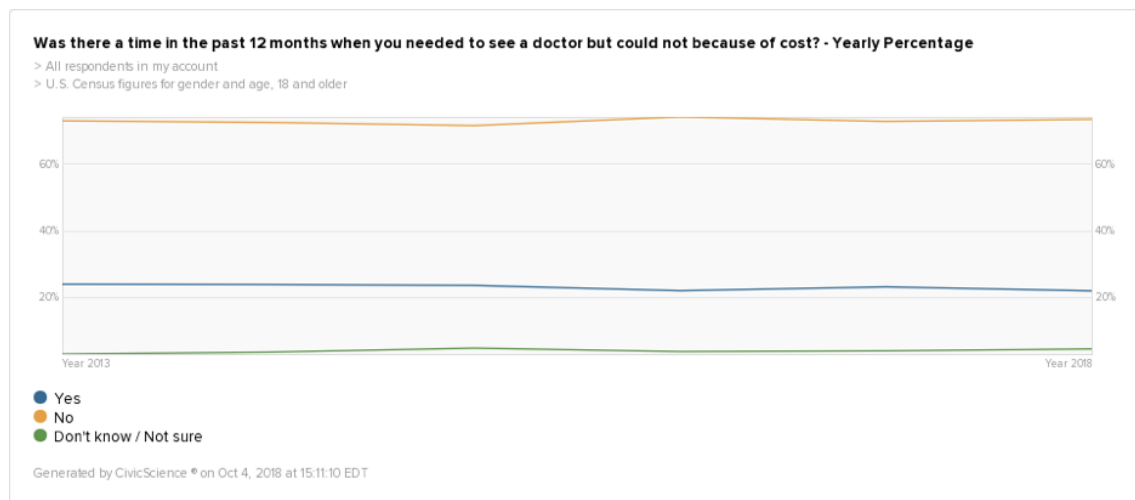
**Consumer confidence stayed eerily flat again.** For the second consecutive reading, our Economic Sentiment Index barely budged, continuing a period of stagnancy unprecedented since we began measuring it 8 years ago. We saw subtle nuances if you care to [read the details](#). There's just something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



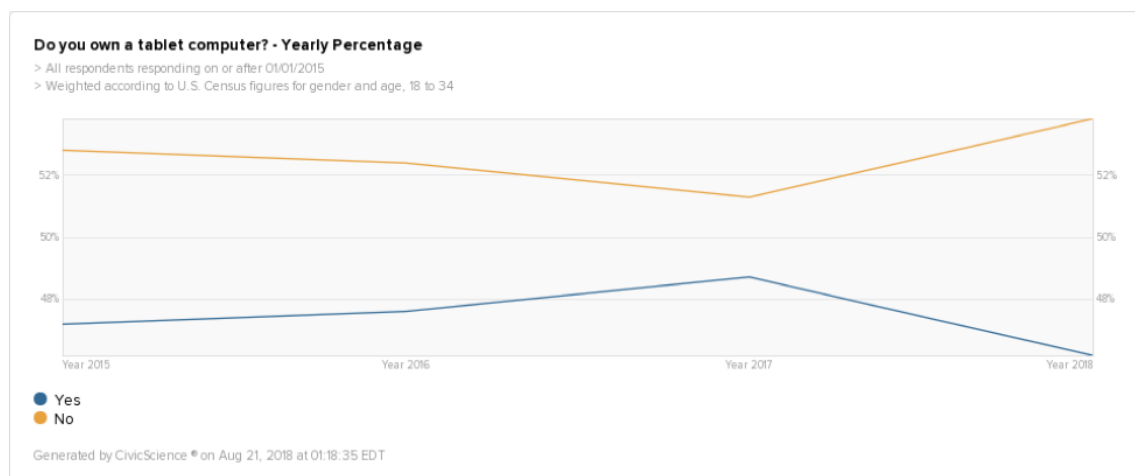
**CBD has the potential to be a formidable niche product category.** I wasn't hip enough to know much about CBD until I read my way through [a short study we did this week](#). Apparently, it's marijuana oil that doesn't get you high. Doesn't that sound appealing? It must to some people because our new 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 [largest correlations](#) were 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):

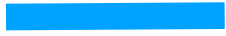
- [Are you good at keeping in touch with old friends?](#)
- [Have you ever contested a ticket in traffic court?](#)
- [Did you talk about the Kavanaugh / Ford hearings with your friends?](#)
- [Do you think more stores should be dog-friendly?](#)
- [Are you good at killing houseplants or keeping them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

Enjoy!

Hoping you’re well.

JD

# CONTACT US



contact@civiscience.com

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