**LikeFolio**

# What **We Do**

We use social media to predict and quantify shifts in consumer spending behavior

**LikeFolio analyzes social media & web data to accurately surface shifts in:**

- Consumer Spending Behavior
- Customer Happiness
- Purchase Intent
- Consumer Macro Trends

**Brand Mention Volume**

**Consumer Happiness**

**Purchase Intent**

# How We Do It

## 1 Ingest Social Media Posts

LikeFolio has a partnership with Twitter, giving us full access to the firehose both historically and real-time, to over 10,000 mentions per second.

Bryan @LivingBestLife332

The scale doesn't lie. It is time to get in shape! Gym or no gym! Decided to start working out at home. Just bought a peloton. Lets go!

## 2 Map to companies & Apply Scoring Metrics

LikeFolio has build and maintains a brand-to-company map that tells us every brand and product of each company we track. We use this to filter Twitter. Once mentions hit our system, we further analyze them for Sentiment and intent to purchase.
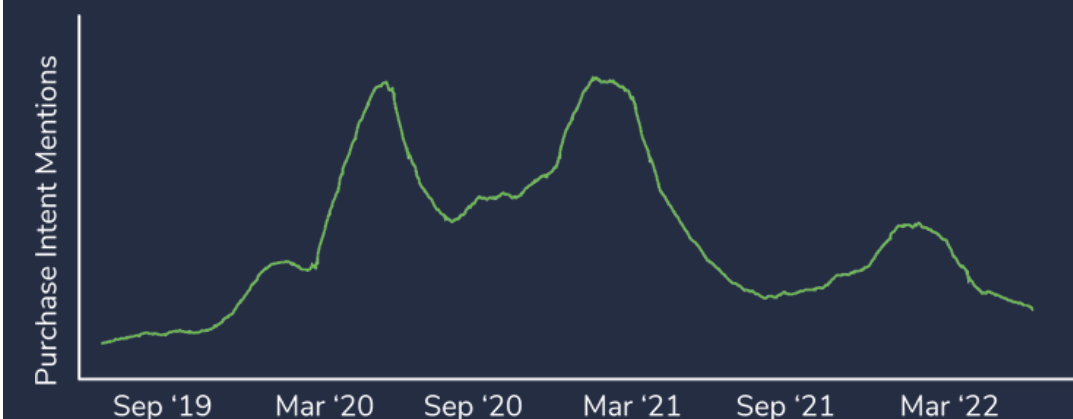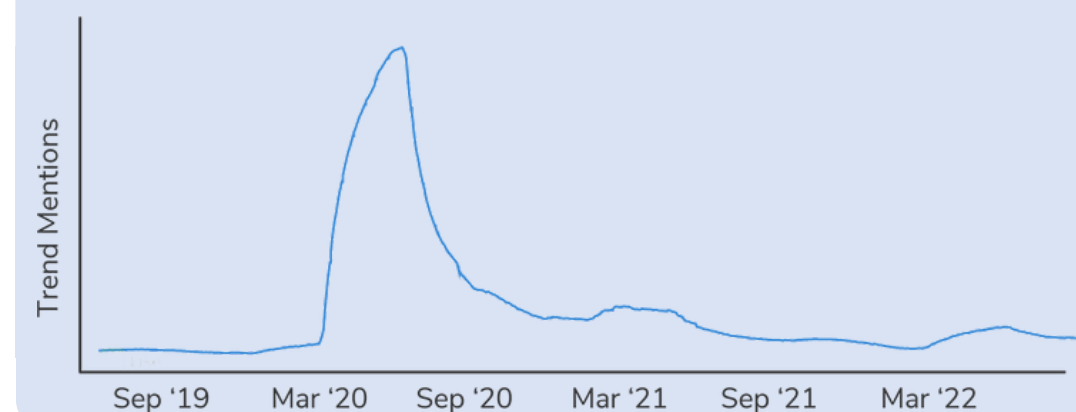
LIKEFOLIO ALGORITHM

## 3 Aggregate Data

Track each metric in real-time, updated daily

### PTON Purchase Intent Mentions

Purchase Intent Mentions

Sep '19   Mar '20   Sep '20   Mar '21   Sep '21   Mar '22

### Working Out at Home Mentions

Trend Mentions

Sep '19   Mar '20   Sep '20   Mar '21   Sep '21   Mar '22

# LikeFolio
# Data Insights

## Social Media

### Quantify Brand Health
View mentions, consumer happiness, and purchase intent for any brand

### View changes over time
Zoom in to the brand level and see which brands are taking off or falling behind.

### Explore Consumer Trends
Hundreds of consumer macro trends mapped to the specific brands they impact.

### See WHY brands are doing well or struggling
See which brands are hitting on what is important to consumers, and what is driving consumer happiness

### Data Download
Every chart has a "CSV" button. Click it to download the data behind anything you see.

## Web Search & Traffic Data

### What are users searching for?
See what users search for, which websites they tend to end up at, and how that changes over time

### Confirm Consumer Trend changes
Combine social and web data to form a complete picture of consumer macro trends affecting your brand

### Competitor insights: Large and small
View changes in web traffic for all competitors

### Sector insights
Demographic and trend shifts confirmed across hundreds of websites and millions of searches
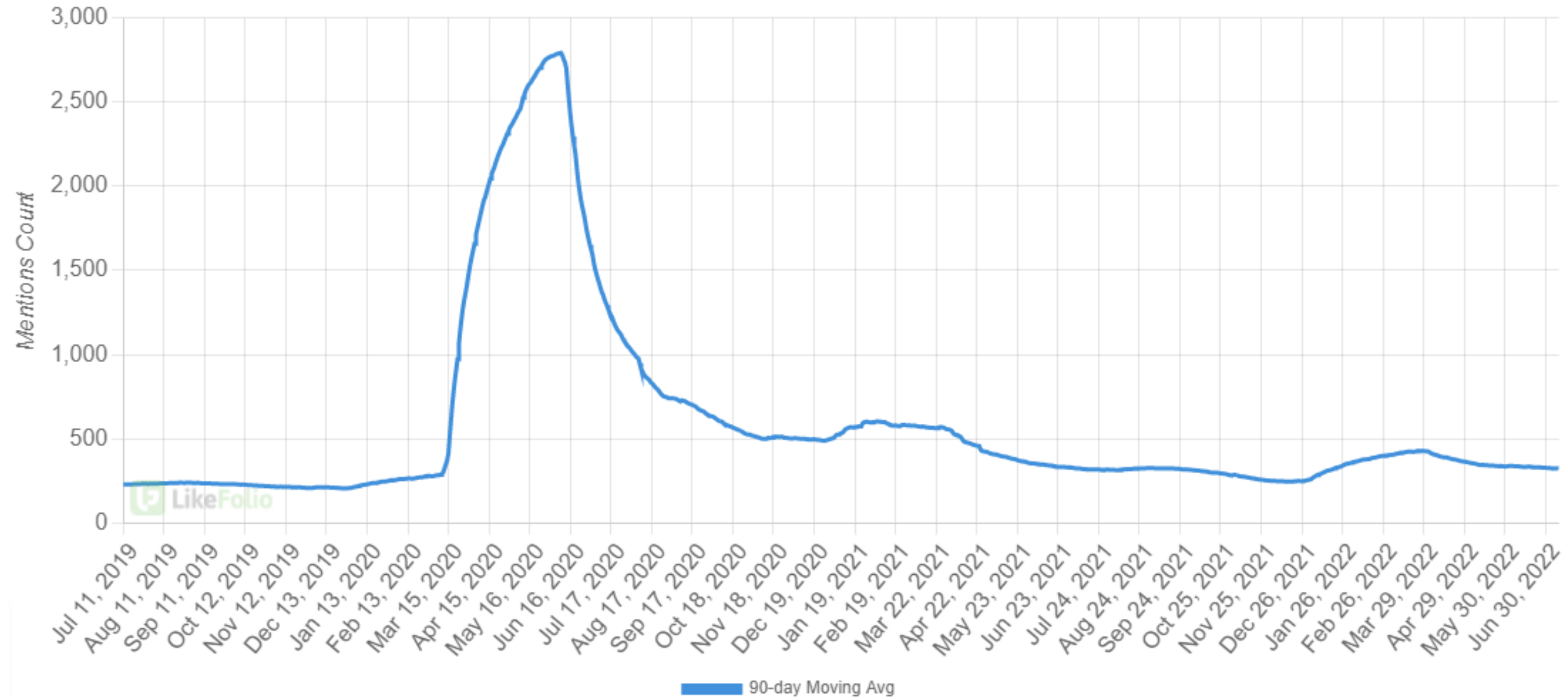
**Use Case Example: Peloton**
Mentions + Purchase Intent + Consumer Happiness
Screenshots taken from the Dashboard, July 2022

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# Working out at Home: Mentions Count
Consumer mentions of working out at home



90-day Moving Avg

March 2020 Covid surge made it clear that Peloton would be propelled by this trend.
But 2 years later, mentions of working out at home have almost returned to pre-covid levels

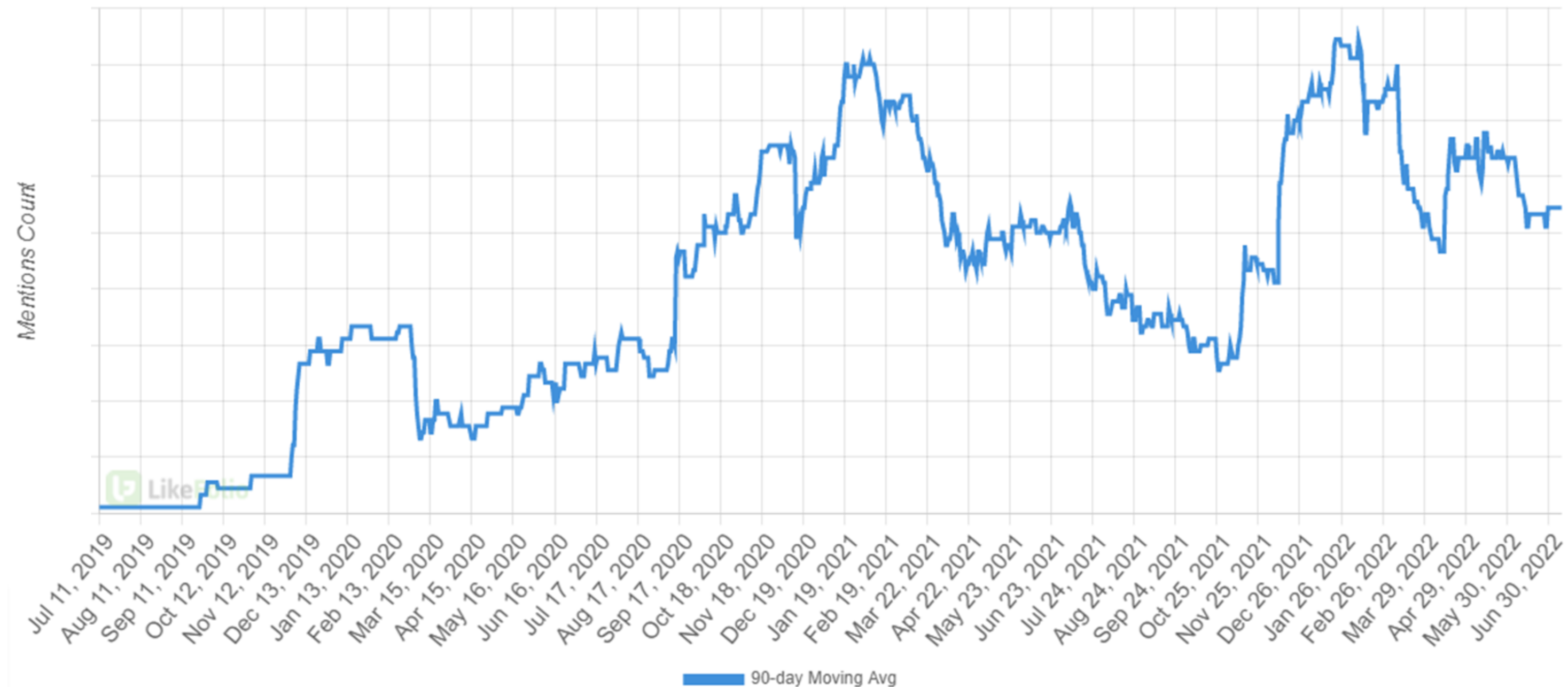LikeFolio

# Consumer Purchase Intent Mentions
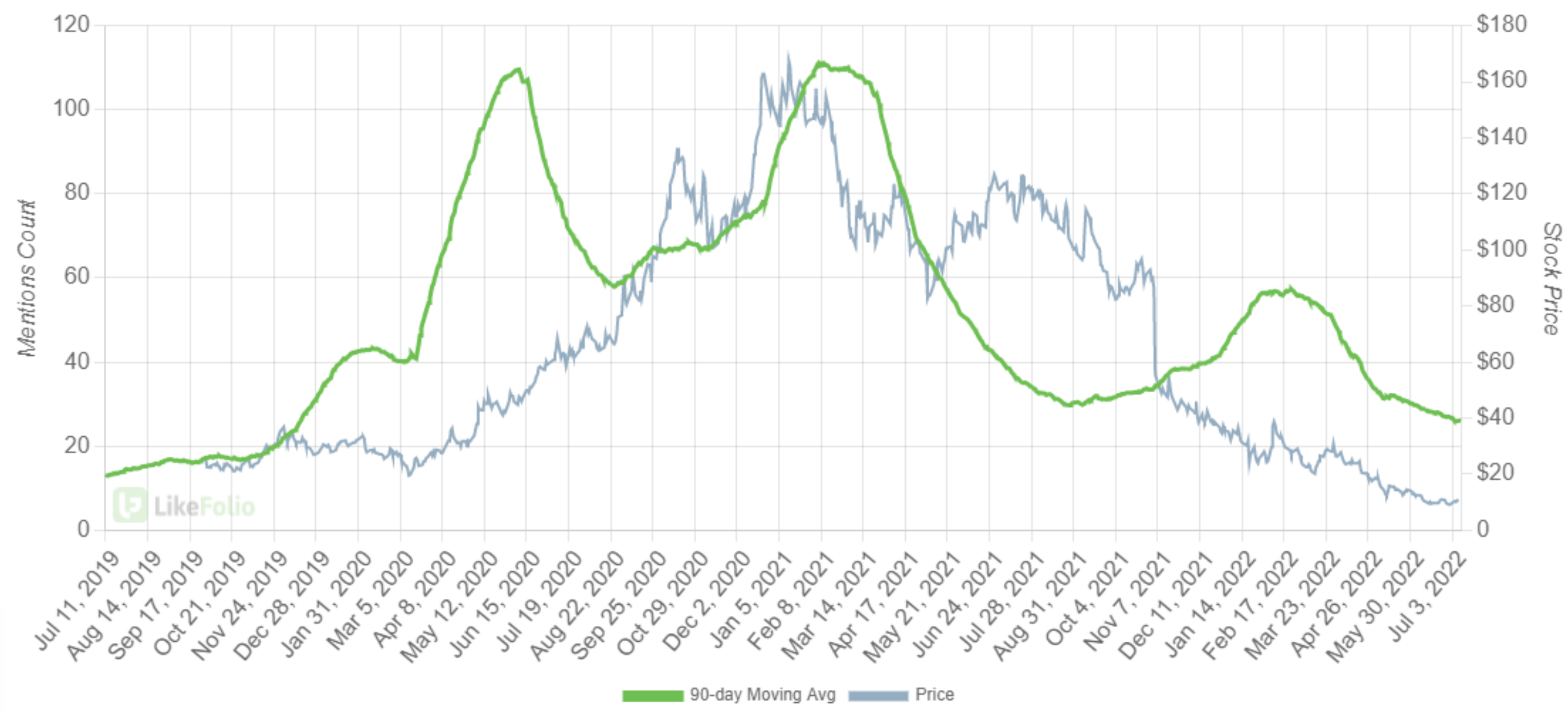
PELOTON®

PTON revenue and stock followed the Covid boom shown by purchase intent,
But then fell as "working out at home" and peloton demand both fell below pre-covid levels

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# "Cancelling Peloton": Mentions Count
Mentions of consumers cancelling their Peloton service



Mentions Count

90-day Moving Avg

Jul 11, 2019 · Aug 11, 2019 · Sep 11, 2019 · Oct 12, 2019 · Nov 12, 2019 · Dec 13, 2019 · Jan 13, 2020 · Feb 13, 2020 · Mar 15, 2020 · Apr 15, 2020 · May 16, 2020 · Jun 16, 2020 · Jul 17, 2020 · Aug 17, 2020 · Sep 17, 2020 · Oct 18, 2020 · Nov 18, 2020 · Dec 19, 2020 · Jan 19, 2021 · Feb 19, 2021 · Mar 22, 2021 · Apr 22, 2021 · May 23, 2021 · Jun 23, 2021 · Jul 24, 2021 · Aug 24, 2021 · Sep 24, 2021 · Oct 25, 2021 · Nov 25, 2021 · Dec 26, 2021 · Jan 26, 2022 · Feb 26, 2022 · Mar 29, 2022 · Apr 29, 2022 · May 30, 2022 · Jun 30, 2022

Unfortunately the surge in new customers was outmatched by the increase in customers cancelling service.

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# Consumer Happiness Mentions

**P PELOTON**®



Legend: Percent Positive — Negative Mentions — Positive Mentions
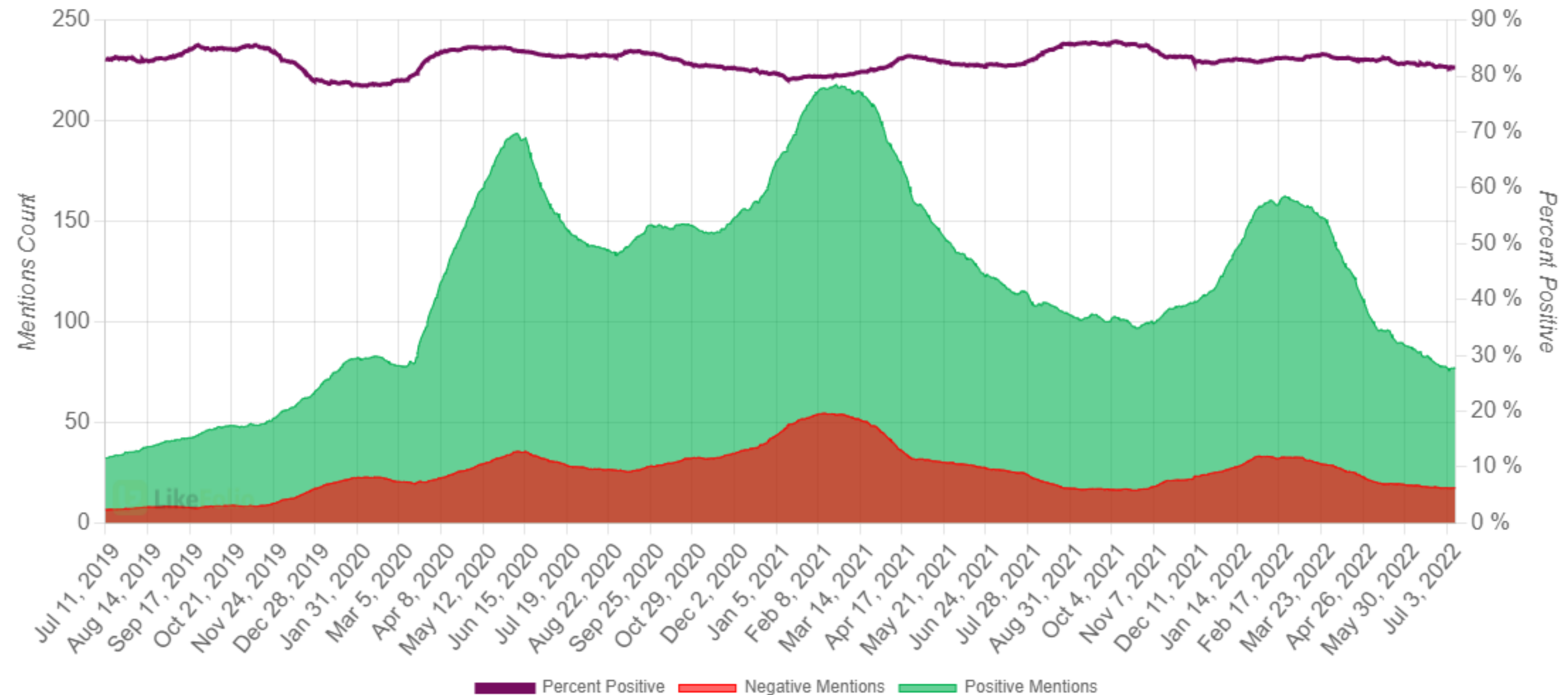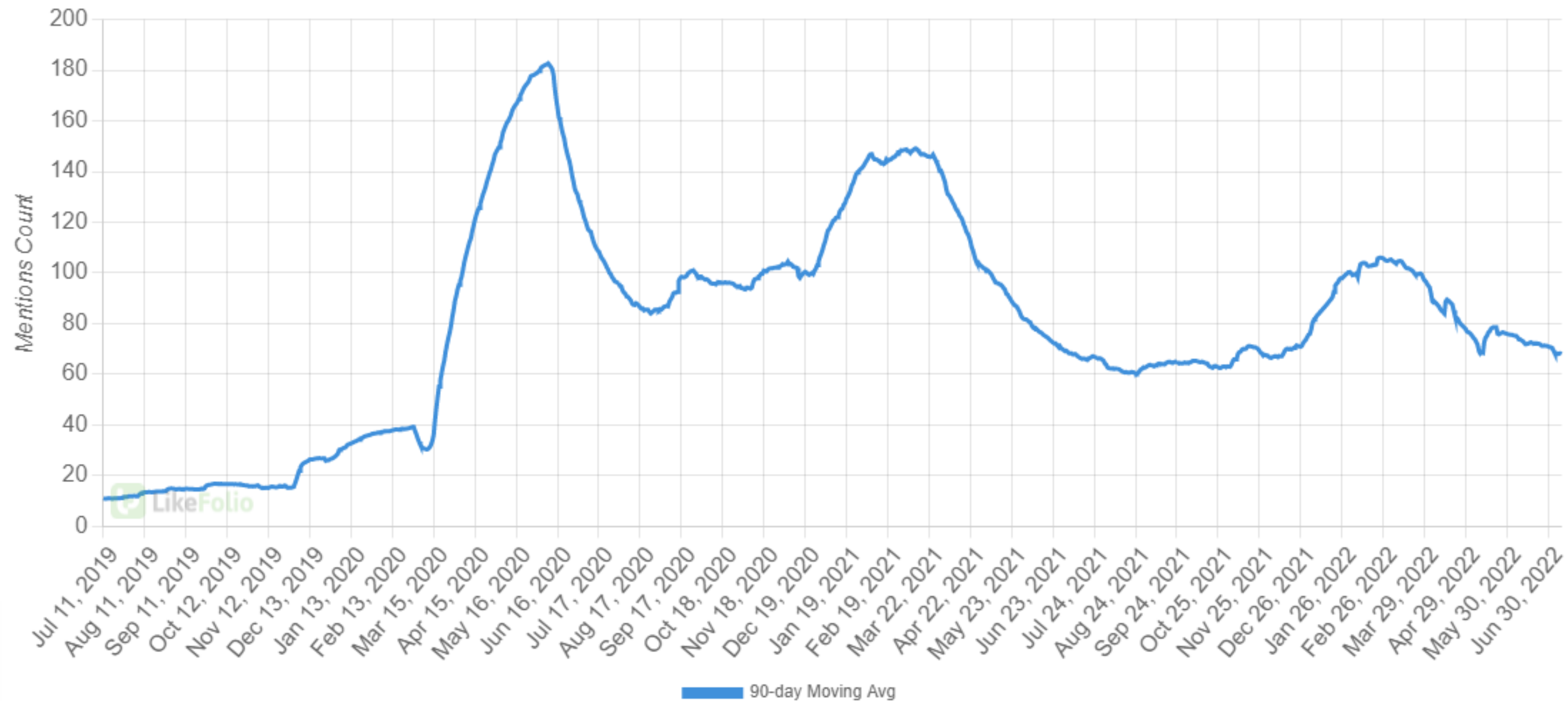
Happiness was high and steady the entire cycle, at 78-85%
Peloton retained a core group of happy users, but failed in 2021 to turn that into new users
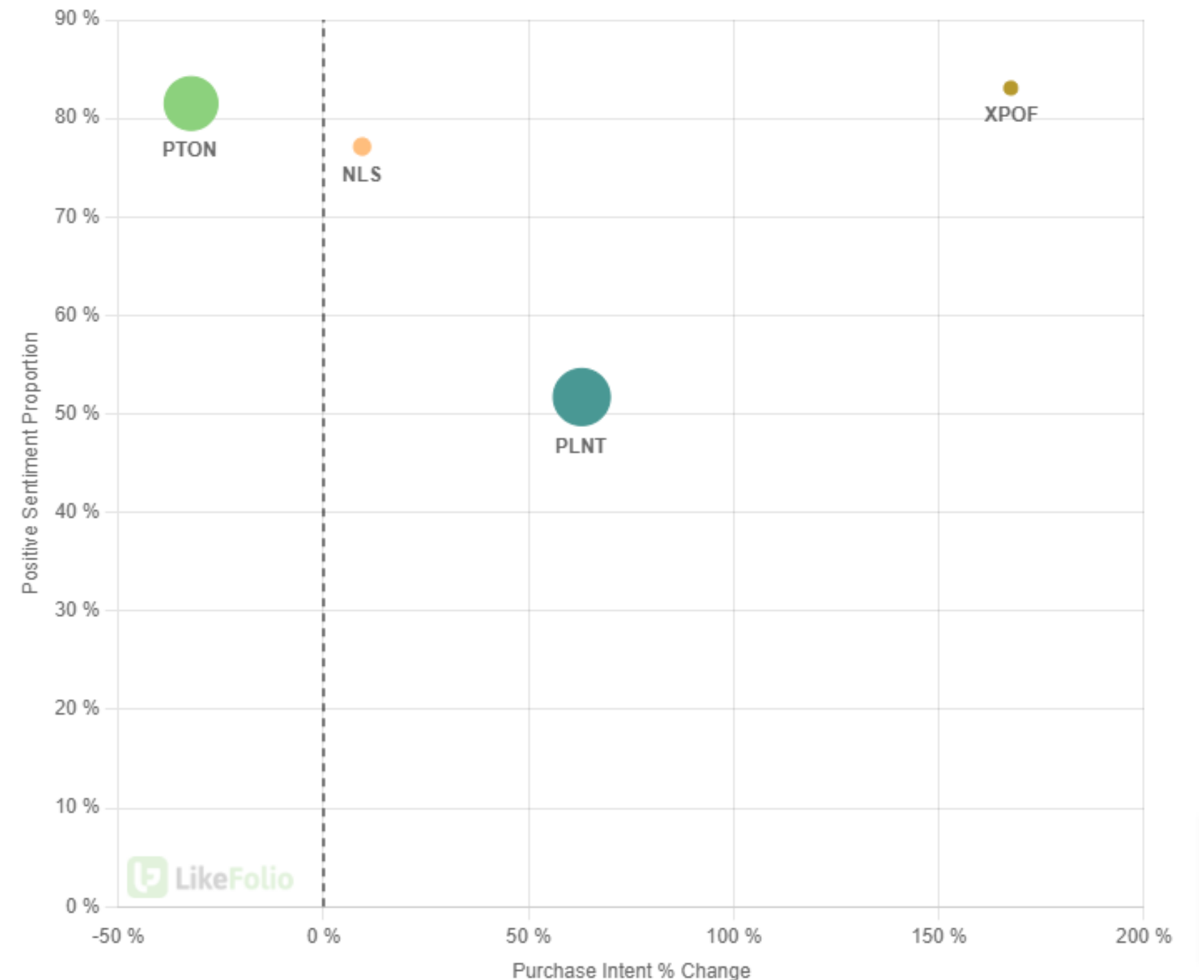
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# Peloton App Usage: Mentions Count
Mentions of consumers using the Peloton app



90-day Moving Avg

App usage held much stronger than purchase of new equipment.
This suggests the best road to recovery may be through the app and ARR it provides.

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# Fitness Competitive Landscape:

- Add any companies to this scatter plot
- in the dashboard.
- X-axis is YoY purchase intent
- Y-axis is consumer happiness
- Dot size represents mention volume
- Note that PTON is the worst versus competition in purchase intent but has very happy customers. XPOF is currently the name to watch in this space.



This is the first of our comparison tools, with more to come including a custom chart builder and screener with automatic alerts.

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