THE W REPORT

Disney + Roku > Netflix

2023-Q1

COMPANIES COVERED IN THIS REPORT

COMCAST Disney NETFLIX Roku

GO FOR THE W™

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Contents

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About wRatings

Basic economic theory shows that in a highly competitive market, returns will be driven down to essentially no economic profit as rivals imitate any known advantage. To achieve a durable advantage, executives must find ways to defy this very powerful force of competition.

At wRatings, we provide a proven, patented way to out-think and out-execute your rivals through our competitive research. Using zero-party (customer) data, we make visible what companies are doing that drives — or inhibits — revenue growth. Our predictive analytics and AI tools identify new opportunities where companies can invest to boost future growth.

We utilize our W-30 companies to continually study the impact of business frameworks on growth. The W Reports™ demonstrate the power of how our data helps executives make better decisions on how to grow their company.

To request a demo of our SaaS and gain access to our proprietary data, go to wRatings.com.

The W-30 Companies

Business Framework	VALUE	PREMIUM	CHALLENGER
Media/ Technology	Google facebook intel Microsoft	Disney	NETFLIX Roku twitter zoom
Food/ Retail	Domino's amazon Costco Wholesale	Starbucks Coffee lululemon	Beyond Meat Chick-fil-A crocs Tractor Supply Co
Industrial/ Transport	ExxonMobil Boeing Ford Southwest	John Deere ups Delta	WM Waste Management Tesla Uber
Home/ Finance	Johnson & Johnson Charles Schwab	Toll Brothers American Express	Zillow Square

See https://wRatings.com/w-30-companies for our most current coverage

Disney + Roku > Netflix

As preferences shift toward streaming TV, the battle for consumer dollars is well underway. As of March 2023, Nielsen says US consumers are split 66% linear and 34% streaming when watching TV. In this new ecosystem, who is best positioned to win? Which business framework best delivers on consumer expectations? What are consumers willing to pay for?

Slightly over a year ago in our ratings, new winners started to emerge. The days of cable TV gave way to streaming TV where consumers vote with their dollars and choose their channels. Today, our data shows that customers view cable providers like Comcast's Xfinity as commoditized; They're a utility now. Contrast that with Roku, where customers see them as simple and innovative for unlocking their TV into a new world of streaming.

But a new challenge is appearing: Pricing power has eroded substantially since 2020, from highs of over 12% to under 4%. This is well below the historic 4.4% for companies in our database. The reason for the downturn: Consumer expectations have shifted, and most media companies struggle to see or respond to them.

Based on our ratings, the real shift came in mid-2022. New world Netflix started to meet its customer expectations better than old world megastar Disney meet theirs. The gap for Disney remains manageable but the Netflix victory is inconsequential. As Disney's streaming business is losing both money & subscribers, a fresh viewpoint could be beneficial for the company.

Our data shows one way to swing more customers in Disney & Roku's favor: Join forces. This report details how consumers view streaming vs cable, and how a Disney + Roku combination leapfrogs them over Netflix.

	xfinity COMCAST	Disney	NETFLIX	ROKU
*No. of Win Factors	6	6	6	6
Mapped to No. of Customer Expectations	14	14	15	15
Assessment as of 2023-Q1	0 ↑ Meeting Expectations 2 ↔ Somewhat Meeting 12 ↓ Not Meeting	5 ↑ Meeting Expectations 5 ↔ Somewhat Meeting 4 ↓ Not Meeting	8 ↑ Meeting Expectations 3 ↔ Somewhat Meeting 4 ↓ Not Meeting	12 ↑ Meeting Expectations 3 ↔ Somewhat Meeting 0 ↓ Not Meeting
Net Promoter Score®	-21.4	26.2	36.6	54.6
Pricing Power	3.5%	3.8%	3.6%	3.5%

* Most companies typically state 3 to 8 growth strategies, which we map to needs from interviews with the company's customers.

Customer data collected during March 2023. Our benchmark database contains customer perception on 12 functional needs and 5 emotional needs, with typical averages of n=200 responses per company on a TTM basis. Threshold gaps for meeting, somewhat meeting and not meeting customers expectations come from our historical database collected since 1999.

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Growth Trends and Opportunities

We utilize four companies to evaluate two, non-mutually exclusive parts of the media ecosystem: access and content.

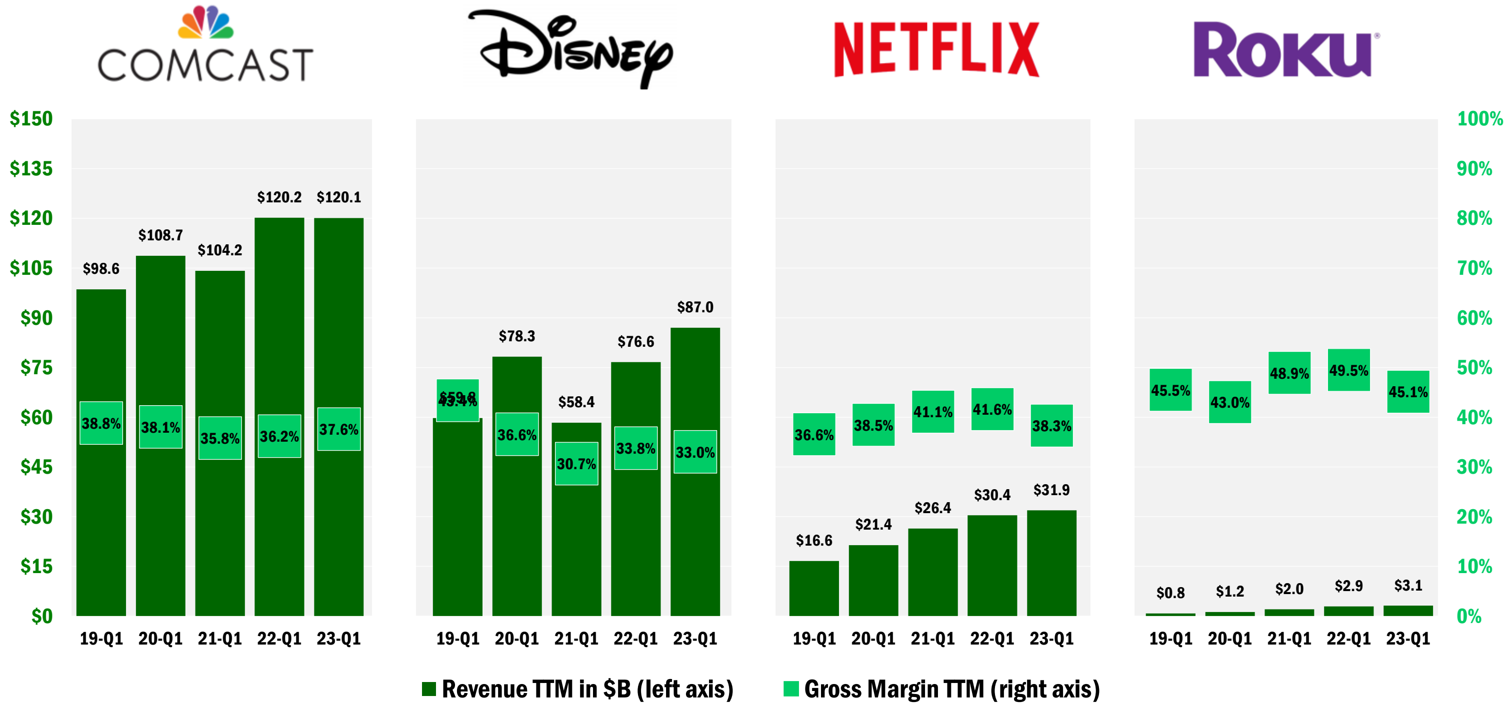
Comcast's Cable Communications segment generates ~52% of their revenues, while Roku generates a fraction of that. Disney's Media & Entertainment segment generates about two-thirds of its overall revenue, which is larger than all of Netflix. Growth for all has slowed considerably over the past year.

The growth challenge for each has some common themes: Consumers possess an increasing number of choices of how to view their entertainment, and their ability to switch within the ecosystem has never been easier. **Each company's business framework and how they deploy it to monetize and keep customers will be the key to unlocking growth and profits.**

In this report, we look at what each company says is their "why" customers select them. We then look at how customers view that company within each of those areas. **This analysis provides a forward-looking view of which companies are best positioned to win more customers and grow revenues.**

We can also envision how a combination of two companies – should their advantages be accretive -- would appear from a customer's point of view.

How we structure this report
Our goal is to measure how well a company is positioned for revenue growth in an objective, data-driven format using customer perception. First, we extract how companies say they compete and win from their investor presentations and other public materials. We then map each win factor to the relevant areas we collect from our customer panels. By measuring the gap between customer expectations and company performance, we assess their likelihood for success. Companies meeting expectations better than rivals are much more likely to win customers in the future and grow their revenues. For independent proof of our data's ability to measure success, see our top 25 Companies fund performance in the Appendix.



Revenue Growth TTM YoY

As of	Comcast	Disney	Netflix	Roku
20-Q1	10.3%	31.0%	28.8%	53.1%
21-Q1	-4.2%	-25.5%	23.3%	63.7%
22-Q1	15.4%	31.3%	15.2%	43.8%
23-Q1	-0.1%	13.5%	5.0%	7.2%

GM Change In Basis Points

As of	Comcast	Disney	Netflix	Roku
20-Q1	-77	-682	190	-247
21-Q1	-224	-592	263	588
22-Q1	37	314	52	57
23-Q1	142	-75	-332	-436

Source: The companies
All data is TTM reported as end of March each calendar year

Why Comcast Says They Win Customers

Comcast (CMCSA) is a global media and technology company operating in three core segments: Xfinity (Cable Communications) with 52% revenue, NBCUniversal (Media, Studios, Theme Parks) with 34% revenue and Sky (Telecom/Content in Europe) with 14% revenue. They also own the Philadelphia Flyers and the Wells Fargo Center in Philly.

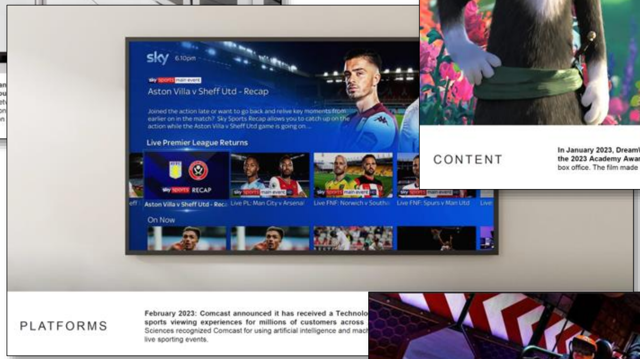
As most geographic areas are limited to two choices for fixed-line internet access (cable or phone), **Comcast's Xfinity operates much like a utility. The danger for utility-type companies is that most customers feel captive rather than vested. The latter enjoys customers that trust them; The former creates customers that want to escape.**

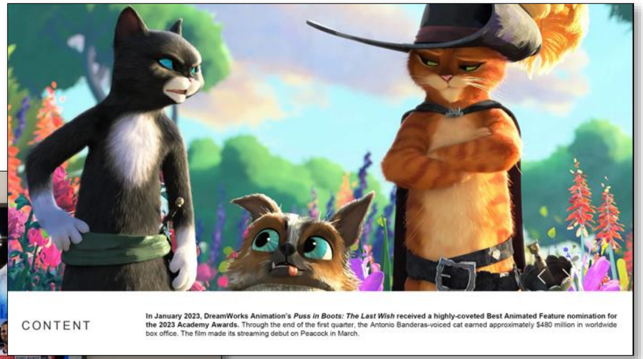
Captive customers also exist in other industries such as airlines in dominant hub cities and your PC's operating system. Our Competitive Profile for Comcast's Xfinity shows just how difficult it is for utility-type businesses to keep customers satisfied.

Comcast's NBCU segment operates similar to the Disney model by building strong brand identities and then generating revenue through them via multiple distribution channels (movies, theme parks, retail, etc.). The Peacock streaming channel is their recent entry into the direct-to-consumer market. Comcast owns 40% of the Hulu streaming channel with Disney owning the rest.

The ability for Comcast to bundle its Xfinity and NBCU segments may provide future competitive advantages, should they find ways to offer consumers superior benefits beyond accessibility.

1st Quarter 2023 Results
April 27, 2023





Why Comcast Wins

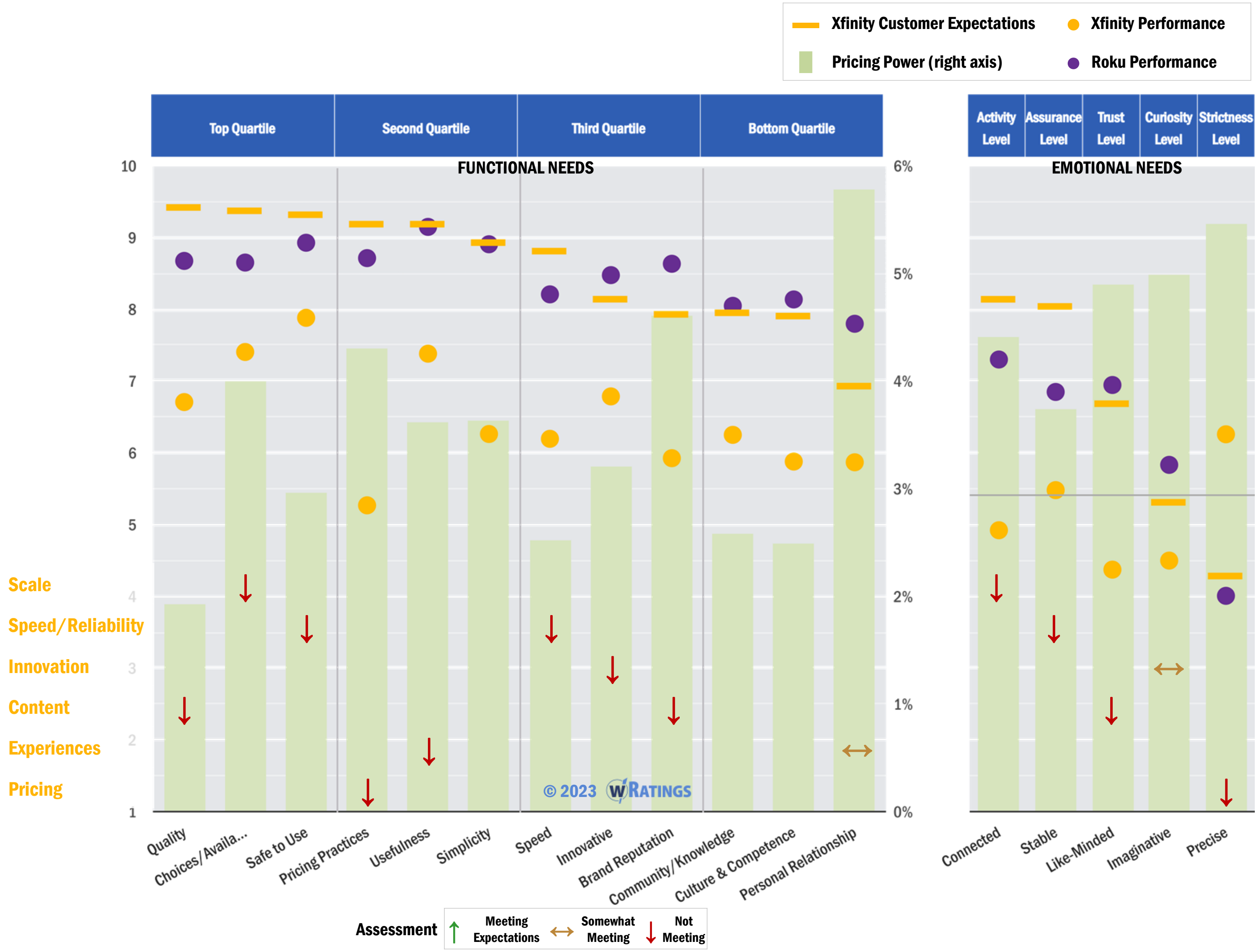
- Connectivity/Scale
- Speed/Reliability
- Platform Innovation
- Content Awards
- Experiences
- Pricing Practices

How Customers View Comcast's Xfinity

To assess Comcast's ability to win, we map each customer area to their expectations (yellow lines) and then measure how closely customers say the company meets them (yellow circles). For comparison, we include Roku customer data (in purple).

- **Connectivity/Scale.** Customers view Xfinity as generally available but not enough options/choices. Their lack of emotional connection is an opportunity to pull NBCU into an ecosystem bundle that delivers unique customer benefits.
- **Speed/Reliability.** This is a difficult area to excel since even a single instance of technical issues causes customers to be displeased. Customers would like to see Xfinity provide higher assurance levels, which means show them you care more.
- **Innovation** is a relatively strong area emotionally, indicating their Technology resonates with customers.
- **Content** for Xfinity customers likely lacks any realization about their NBCU relationship. Neither Comcast business enjoys the same brand reputation that Disney, Netflix or Roku occupies.
- **Experiences.** Similar to content, the absence of a cohesive, single brand impacts how customers view Universal themed events and parks. Customers do believe Xfinity has built a personal relationship with them, a positive for future growth.
- **Pricing Practices.** Unsurprisingly, customers don't like the lack of flexibility and pricing practices of Xfinity. This is a core result of customers feeling trapped and held captive.

Whereas most customers feel Xfinity holds them captive (low performance), Roku customers are quite satisfied. This illustrates the strong differences between streaming and cable customers today.



Why Disney Says They Win Customers

The Walt Disney Company (DIS) operates in two business segments: Media/Entertainment and Parks/Experiences.

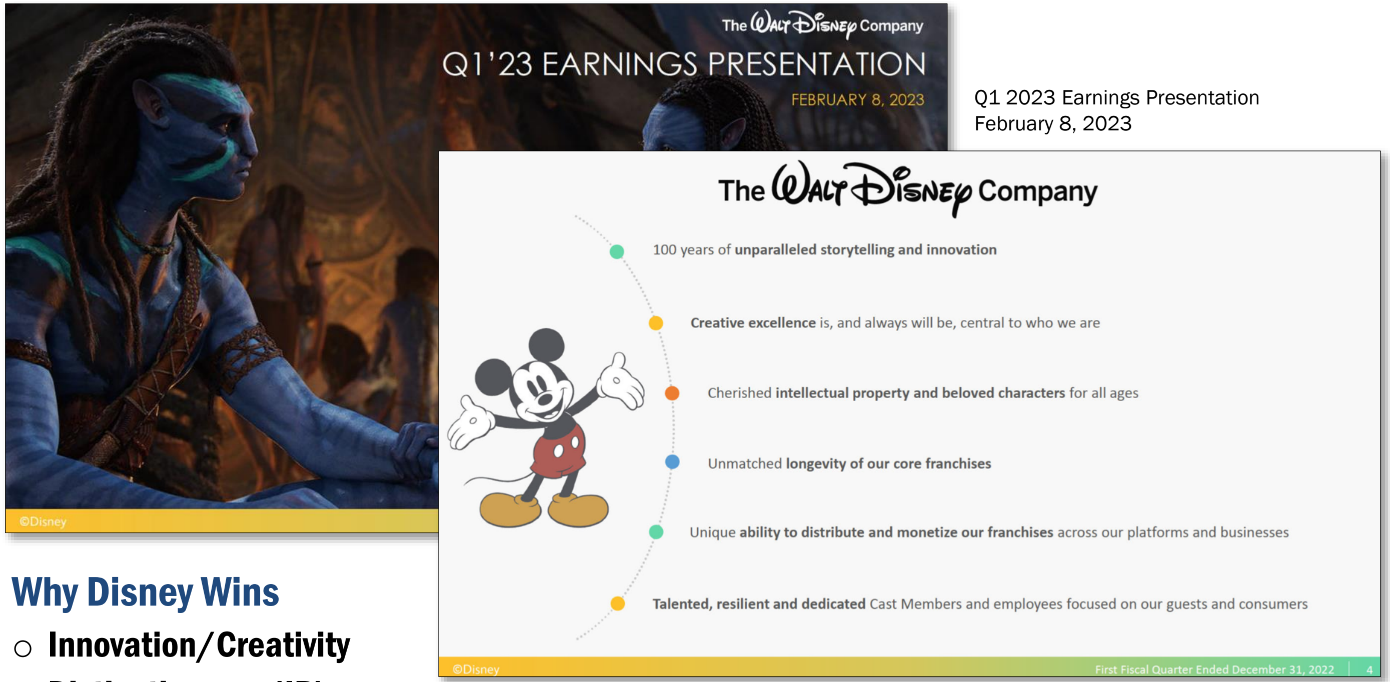
Decades ago, they pioneered a unique business framework that generates one of the strongest customer moats that lock-out competitors. They hire great talent and call them "imagineers." They build unique, beloved characters and register them as intellectual property for protection. Finally, they cover all channels of distribution so customers can experience them fully.

The Disney distribution channels – movies, TV, games, theme parks, cruise ships, toys, retail – provide the means to squeeze every revenue & profit dollar possible from each character.

To continue growing, Disney must boost its direct-to-consumer (DTC) capabilities to stream its content. Successfully tapping into the DTC market can unlock huge revenue opportunities for not only its beloved characters, but also programming from its dominant ESPN content for sports.

Disney+ lost 4 million subscribers in the last quarter, and the company is working on its ad-supported tier. The DTC subscription battle is well underway, with winners yet to be formed but plenty of competitors already in the game.

As consumers have more and more choices for content, the pricing power for Disney has eroded and sits at 3.8% versus 3.6% for Netflix. New strategies for Disney must be employed. Disney now plans to integrate Hulu into the Disney+ channel, indicating their move into more general entertainment in addition to their beloved characters approach.



Q1 2023 Earnings Presentation
February 8, 2023

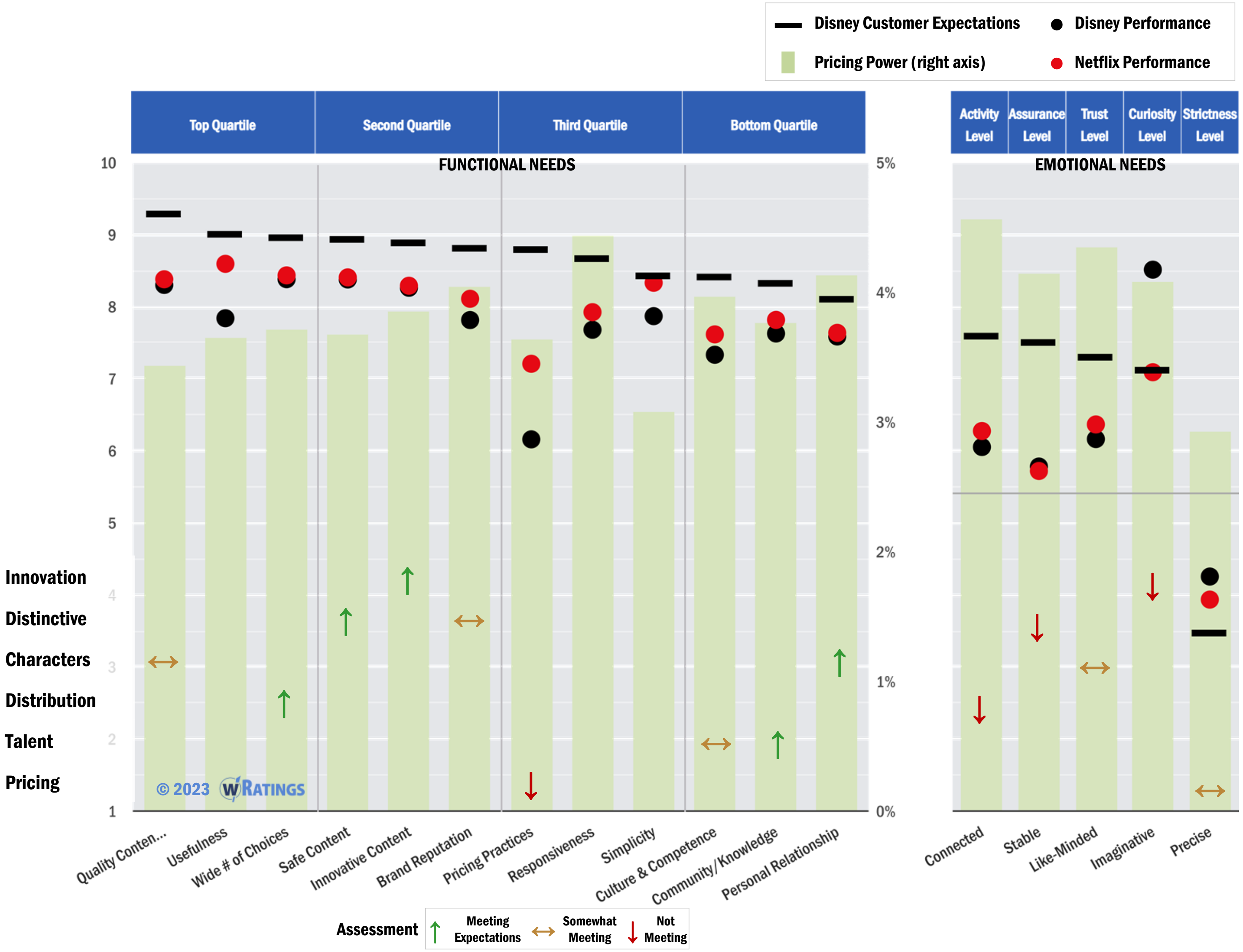
Why Disney Wins

- Innovation/Creativity
- Distinctiveness (IP)
- Beloved Characters
- Distribution Platforms
- Talent
- Pricing Plans

How Customers View Disney

To assess Disney's ability to win, we map each customer area to their expectations (black lines) and then measure how closely customers say the company meets them (black circles). We include Netflix (in red) customers for comparison.

- **Innovation/Creativity.** While customers do believe their content is innovative, Disney is overdelivering on its imaginative levels. This favors Disney creating more DTC capabilities, as customers want to see a more practical Disney that fits into their daily routines better.
- **Distinctiveness (IP).** The lack of stability in how Disney operates has impacted their reputation, although customers still believe their content is safe to consume.
- **Beloved Characters.** Customers continue to build personal relationships with the Disney characters, although customer trust levels are not as high as expected.
- **Distribution Platforms.** Customers love the choices available from Disney, although they would like see more ways to connect with them. This favors more DTC by Disney.
- **Talent.** Customers are only somewhat satisfied with Disney's culture, competence and community.
- **Pricing Plans.** As with most premium offerings, customers are not pleased with Disney prices. Disney could create more flexibility and pricing tiers by improving its DTC capabilities.



Why Netflix Says They Win Customers

Netflix (NFLX) operates as a single business segment in entertainment services. Customers subscribe to gain access to TV series, films and games from a large number of genres.

The company launched in 1998 initially as an online movie rental service delivering DVDs to subscriber homes with the promise of no late fees. As home internet with fast speeds became the norm, the company shifted out of delivery and into streaming its library of content.

As we see in its 2002 annual report, the Netflix promise to customers has notoriously not changed much at all. They are in the business of delivering great entertainment direct to your home. They offer convenience and selection all at a great value. As of the end of December 2022, pricing ranged from $1 to $26 per month.

Their brand is highly visible and virtually synonymous with a stay-at-home evening: Netflix and chill. A key growth strategy has been their strong commitment to deliver Netflix Originals content, which they own exclusively. To better compete with other brands, the company has shifted to include licensed content.

Today, Netflix focuses on getting consumers to choose them in their moments of free time, or what they call "winning moments of truth." This requires continual improvement of not just content, but the technology to find and engage with it.

Whereas rivals like Disney focus on multiple channels of distribution, Netflix is "all in" on streaming where they plan to succeed by "getting a bit better, a bit faster" every month.

Netflix Annual Report 2002

MERCHANDISING MAGIC.

The result of these trends is a market that we currently dominate with a highly visible brand presence. It is also a market that we believe will continue to mature, along with our Company. To ensure that we take advantage of this momentum, we are continually developing our understanding of how people browse and select movies.

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ENTERTAINMENT: CONVENIENCE, SELECTION, AND VALUE.

At Netflix, we are in the business of delivering great movies. Plain and simple. Our subscribers never go to the video store on a Saturday night to rent a movie—or make a return trip to avoid a late fee. Instead, Netflix offers our subscribers direct home delivery of their
pular subscription package, they
month.

NETFLIX®

LAUNCHED IN 1998, NETFLIX IS THE WORLD'S LARGEST ONLINE MOVIE RENTAL SERVICE, PROVIDING MORE THAN ONE MILLION SUBSCRIBERS WITH ACCESS TO A COMPREHENSIVE LIBRARY OF MORE THAN 14,500 DVD TITLES, WITH GENERALLY NEXT-DAY DELIVERY TO MOST SUBSCRIBERS, AND NO LATE FEES. THE COMPANY ALSO PROVIDES BACKGROUND INFORMATION ON DVD RELEASES, INCLUDING CRITIC REVIEWS, MEMBER REVIEWS AND RATINGS, AND PERSONALIZED MOVIE RECOMMENDATIONS. NETFLIX'S SHARES TRADE ON THE NASDAQ STOCK MARKET UNDER THE SYMBOL "NFLX." FOR MORE INFORMATION, VISIT WWW.NETFLIX.COM.

Netflix Annual Report 2002

Netflix Annual Report 2002

Why Netflix Wins

- Brand Visibility/Culture
- Convenience
- Selection/Originals
- Value/Pricing Plans
- Moments of Truth/Free Time
- Engagement/Relationship

	Netflix Originals (Branded)		2nd Run movies & TV shows
Type of content	Owned	Licensed	Licensed
Examples	*Stranger Things, Dave Chappelle, Ingobernable, Bird Box, Dark, Sacred Games, Big Mouth, Bridgerton, Nailed It!, The Irishman, The Witcher, The Queen's Gambit*	*Ozark* (MRC), *Orange is the New Black* (Lionsgate), *Narcos* (Gaumont), *The Crown* (Sony), *13 Reasons Why* (Paramount)	*Shameless* (Showtime), *How to Get Away with Murder* (ABC), *Grey's Anatomy* (Disney), *The Godfather* (Paramount)

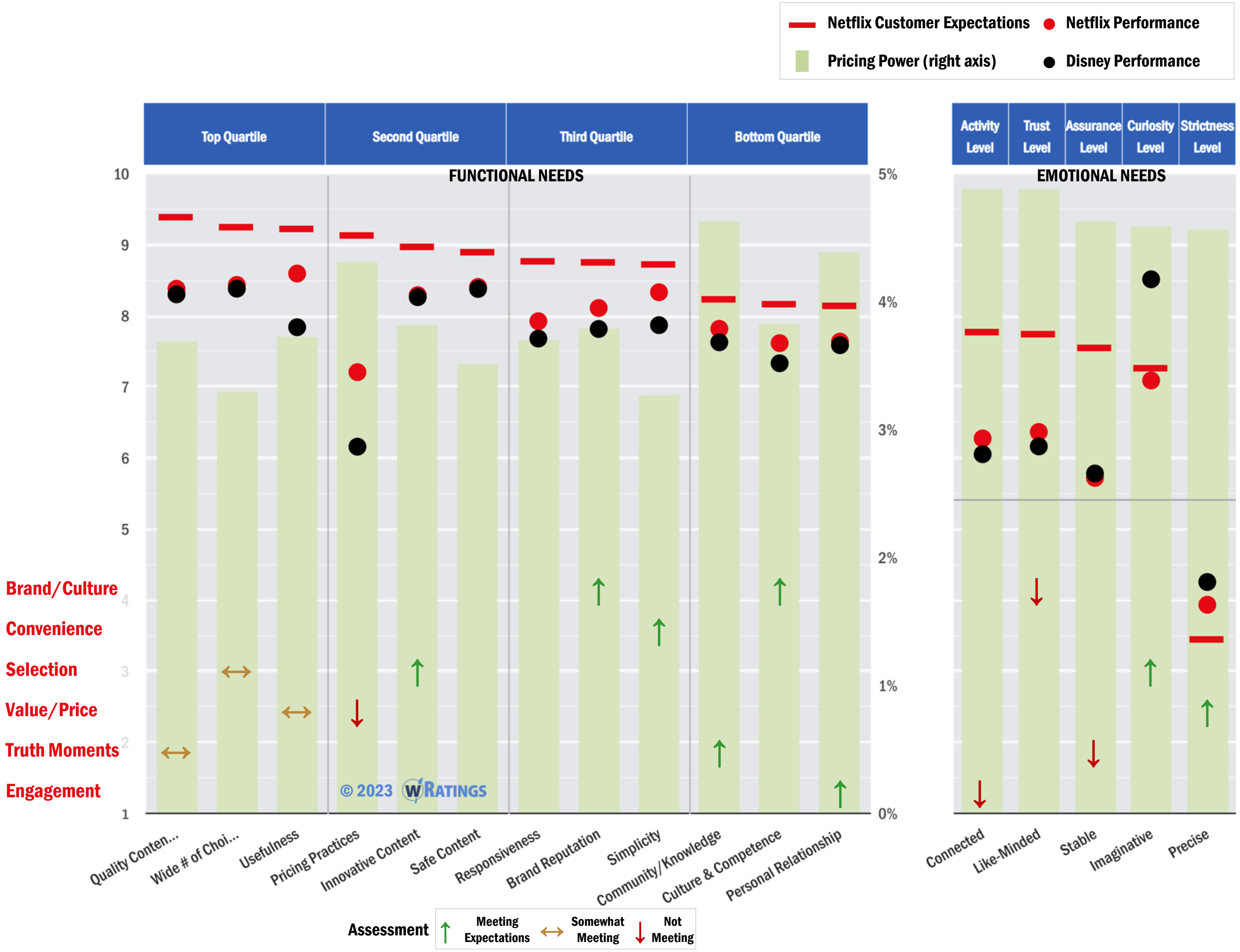
Overview of Content Accounting
July 2022

How Customers View Netflix

To assess Netflix's ability to win, we map each customer area to their expectations (red lines) and then measure how closely customers say the company meets them (red circles). We include Disney customers (in black) for comparison.

- **Brand Visibility/Culture.** Famous for its Culture deck, customers still think highly of the Netflix brand and competence levels. Trust levels are not high, the customers believe the company is not thinking as much like them as in the past.
- **Convenience.** Customers love the simplicity of Netflix, but also fear the company changing too much as stability is lagging.
- **Selection/Originals.** Customers view Netflix Originals as being strongly innovative, but would like to see more choices.
- **Value/Pricing Plans.** Customers appreciate the flexibility Netflix is offering them in their pricing plans, even if they don't much appreciate the actual price. Customers view Disney's pricing as even worse than Netflix.
- **Moments of Truth.** In their moments of truth, customers relying on the Netflix community for guidance is working very well. But customers are looking for Netflix to maintain greater consistency and higher quality content.
- **Engagement/Relationship.** While customers do believe Netflix has built a personalized relationship with them, they would prefer the company find better ways to emotionally connect with them.

Although customers see Netflix meeting their expectations across most all functional needs, **Netflix needs to explore ways to emotionally bond more with customers to drive engagement.**



Why Roku Says They Win Customers

Roku (ROKU) pioneered streaming to the TV, and based on streaming hours, is the leading platform in the US, Canada and Mexico.

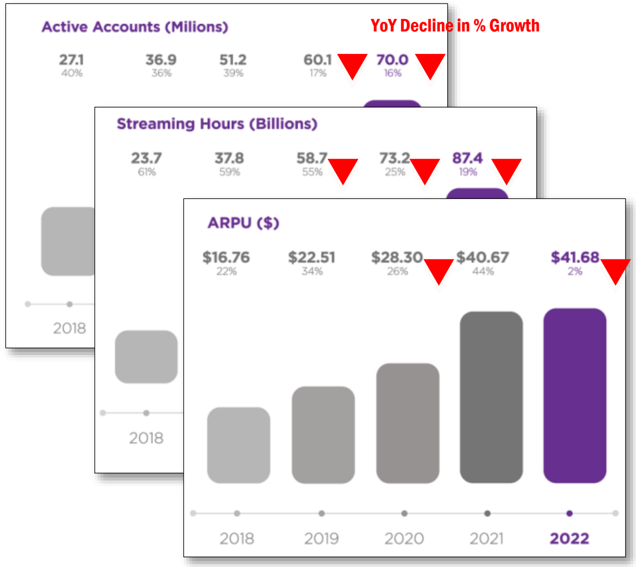
Roku occupies an enviable spot in the streaming ecosystem where they are the entry point for consumers. According to the company, 50% of all 2023 Super Bowl streaming took place on Roku. Monetizing that leading position as the home screen for streaming TV is critical to Roku's future success.

The Roku ecosystem consists of several parts starting with consumers and extending to retailers, content publishers, advertisers and smart TV manufacturers. They report revenues by platform (Roku OS with its Channel Store) and devices (streaming players, TV, audio and smart home). In 2022, the platform segment generated ~87% of its revenue.

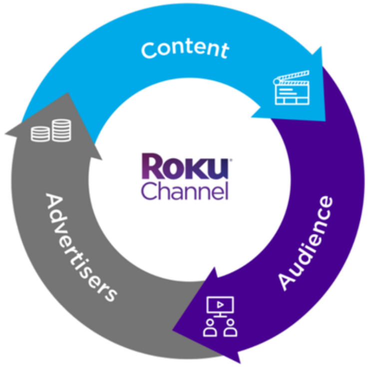
Their business model for growth is straight-forward: Add more active accounts, increase the hours of content streamed, and monetize consumer activity within their platform.

The challenge for Roku today is that in all three areas, growth slowed not just in 2022, but in at least two of the last three years. Yet, despite slowing growth and being in one of the most highly competitive markets, consumers absolutely love Roku.

Many ways exist to re-energize growth: International expansion, more OS licensing to TV manufacturers, and selling more Roku TVs and other branded devices. Regardless of which growth areas the company selects, the Roku experience is well-liked by its customers.



4Q22 Roku Shareholder Letter
February 15, 2023



The Roku Channel Flywheel

Roku Q12021 Shareholder Letter
May 6, 2021

Why Roku Wins

- **Access to Streaming**
- **Affordable Streaming**
- **Wide Range of Content**
- **Easy-to-Use**
- **Universal Search**
- **Channel Engagement**

Roku 10-k 2022
February 16, 2023

Roku Sports experience

How Customers View Roku

To assess Roku's ability to win, we map each customer area to their expectations (purple lines) and then measure how closely customers say the company meets them (purple circles). We include Xfinity customers (in yellow) for comparison.

- **Access to Streaming.** The Roku brand is best known to customers for its innovative ability to convert any TV into a streaming device.
- **Affordable Streaming.** For a small, one-time fee of a Roku device, customers can add/delete channels to stream for free or pay as part of a subscription.
- **Wide Range of Content.** Roku offers customers a selection of choices that are considered of quality. This is the only area where Roku is not fully meeting customer expectations, although they are very close.
- **Easy-to-Use.** The user interface provides customers with a simple, safe way to access streaming channels.
- **Universal Search.** One of the most powerful features is Roku's ability to search and find content that a user desires to watch, even if the user does not have the access to the channel already. This network effect connects users with potentially new channels not considered to download previously.
- **Channel Engagement.** Roku's direct relationship with its users provides a rich set of data to know what they want in terms of channels, content and purchases/subscriptions. This allows customers to believe Roku "thinks" like them, promoting a high degree of trust.

Moat Framework & Revenue Growth

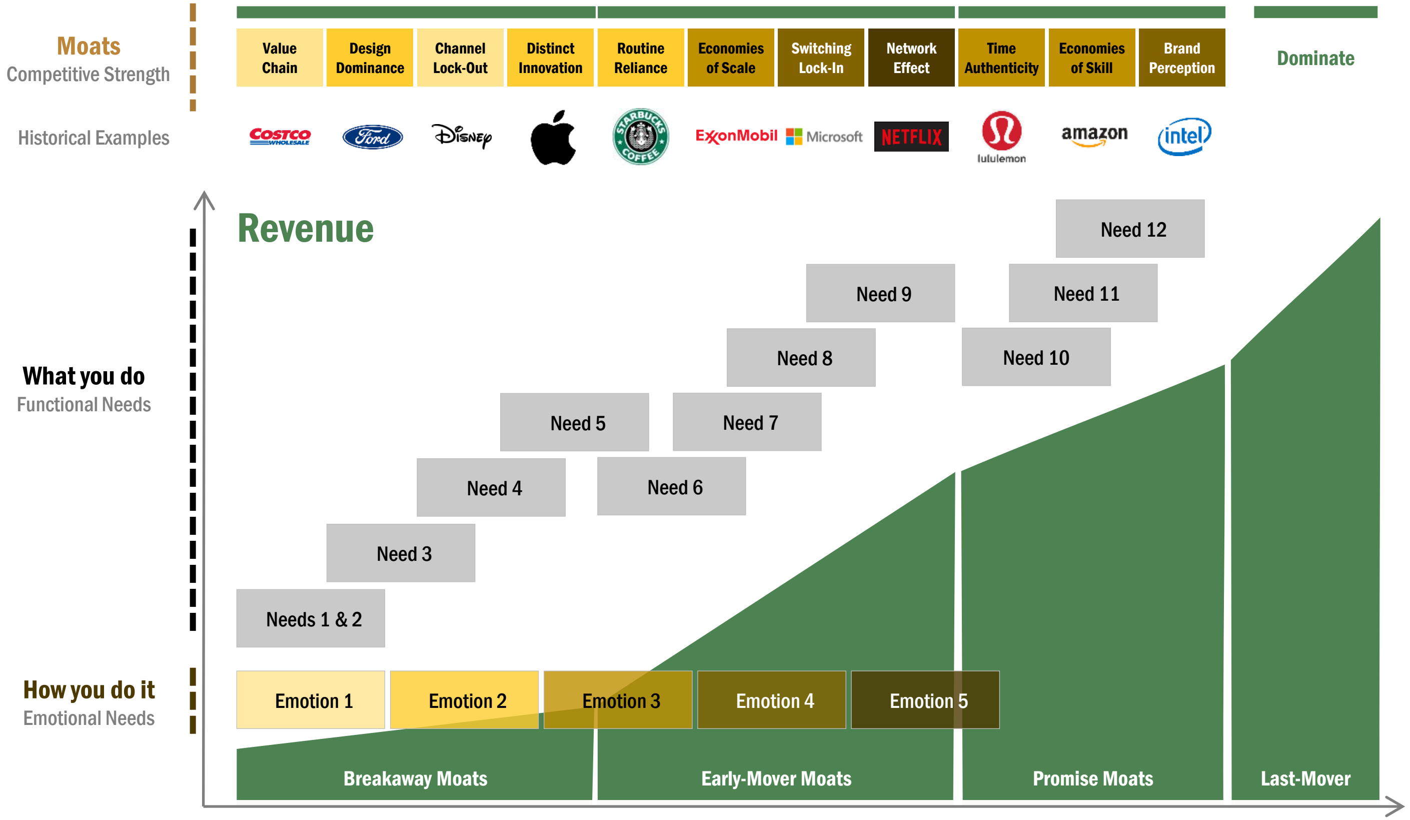
Similar to castles of the past, companies must build moats around their customers to keep rivals from taking them away. Most discussion about moats in business refer to economic moats, where a company's advantages are seen (or not) in their financials. Our moats refer to customer moats, which are the precursors to and continuation of economic moats.

In two different studies (2001-2005 and 2005-2015), we examined 135,000+ customer interviews to determine what the most financially successful companies did to meet expectations better than their industry rivals. **We found 11 patterns – moats – in the data that show how companies progress through stages to meet specific customer needs and build momentum**.

Executives can borrow ideas that meet those needs from other companies outside their industry and adapt them to build moats to out-smart and out-execute rivals.

Progression to revenue growth typically occurs over four stages:

- **Breakaway:** Between 80% to 90% of all companies get stuck in the first two moats as they fluctuate between performance and price promises. Don't think outside the box, create a new one.
- **Early-Mover:** Out-think and out-execute rivals by setting up new rules that rivals struggle to follow.
- **Promise:** Using the power of consistency over time, generate barriers for customers to use in their buying decision factors.
- **Last-Mover:** Never let rivals say they are "the same"; Constantly defend and repeat growth moats to avoid reversion to the mean on your financials.



Progression to Revenue Growth

How Disney + Roku Looks to Customers

Moat Profiles rearrange customer data into stages of revenue growth progression to see the best opportunities for growth.

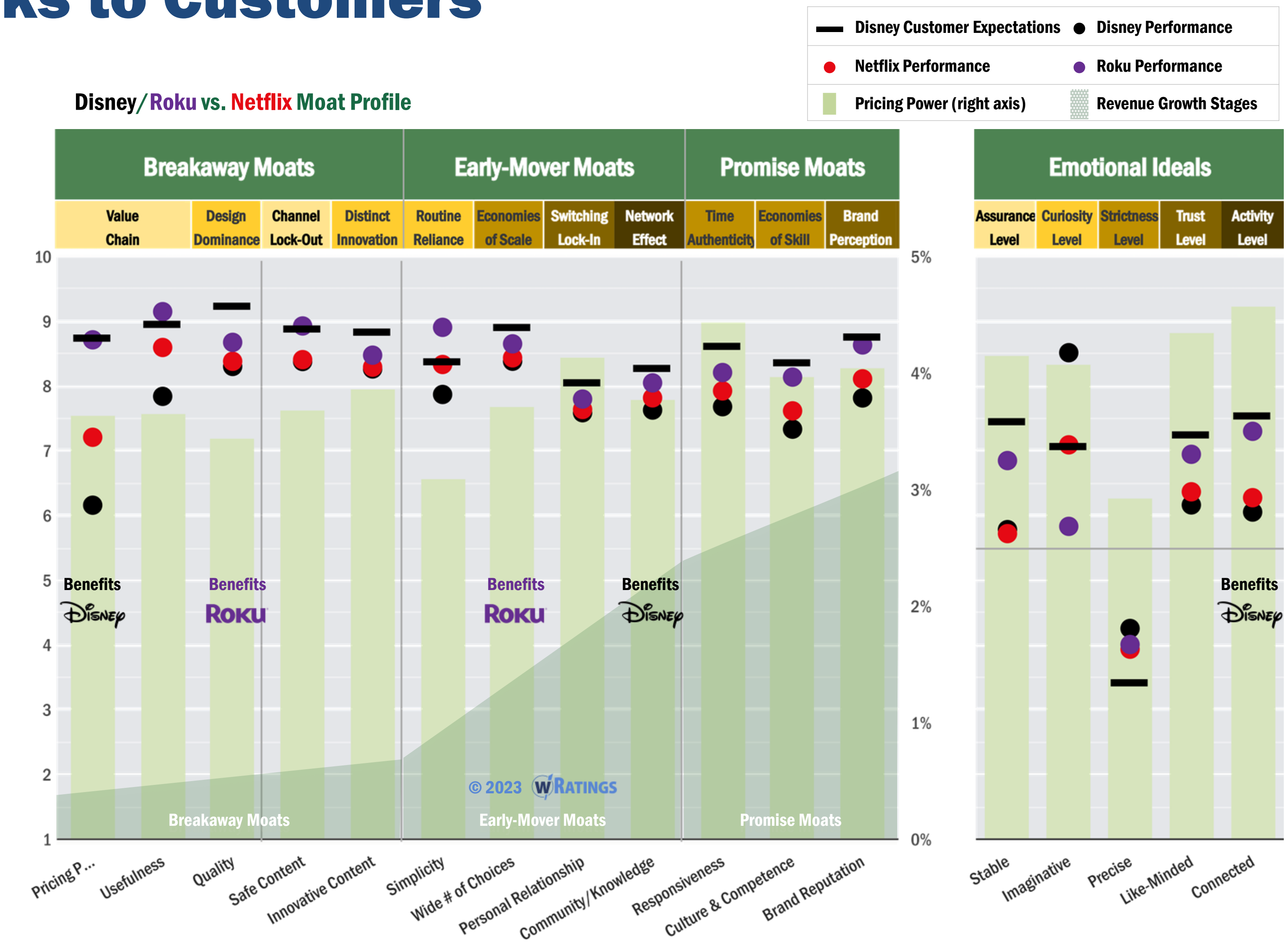
From solely a customer perspective, a Disney/Roku combination provides an easy way for Disney to leapfrog Netflix and for Roku to scale their business to compete with Amazon, Google and others. No need to change Roku at all; Just buy, learn and help each other grow.

The key reasons for Roku to join efforts with Disney:

- Should Roku choose to integrate any parts of Hulu or Disney contents into its free Roku Channel, customers gain access to higher quality content and more choices to watch for free.
- Ability to compete with much larger firms in the device and OS licensing space such as Amazon Fire, Apple TV and Google Android TV/Chromecast.
- Ability to scale internationally using the Disney brand name as an entry point to gain initial users.

The key reasons for Disney to join efforts with Roku:

- Provides a way for users to experience any of the Disney beloved characters in a free way, whether through ads, the Roku Channel, new/future branded channels, etc. A free pricing tier expands the offerings w/o diminishing the premium brand aspect of Disney characters.
- Gain access to extensive user knowledge and data regarding content, purchase preferences, ad supported viewing, etc.
- Leapfrog the Disney DTC distribution capabilities into the next performance tier to better compete with Netflix, Amazon, Google and others.



Appendix

The Power of wRatings

Our Business Framework: We Help Executives Win

Using our customer expectations, **we make revenue growth visible so executives can set the new rules of competition in their markets.**

To drive financial improvement for our clients, we make a series of fixed investments in tools, benchmark databases and predictive analytics. Using our proprietary algorithms and patented methods, we build forward-looking views of where companies can create compelling value for their customers.

In May 2002, our research was highlighted as the cover article in *Harvard Business Review*. We are a partner to the *Drucker Institute* to score the best managed companies, which is published in the *Wall Street Journal* every December.

CEOs/Executive Teams and PE Firms/Hedge Funds gain real-time access to our research & analytics through our fully automated SaaS (Software-as-a-Service).

Since January 1st, 2015, one private fund has invested in the top 25 companies from our rankings, and the fund has out-performed the S&P 500, Russell 1000 and Russell 2500 on a consistent basis.

FIXED INVESTMENTS

SaaS (Software-as-a-Service)

Patents, Analytics & Predictive Power

Benchmark Database

LEVERAGED BY

Online Panels & Business Members

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Reports, Indexes & Events

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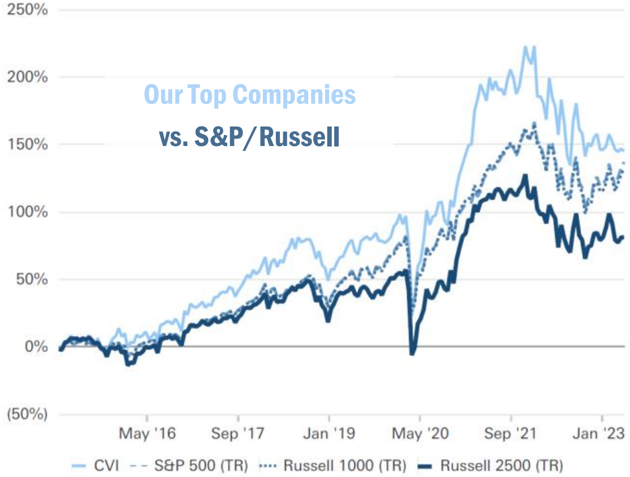
CEOs & Executive Teams

PE Firms & Hedge Funds

Companies scoring the highest in our ratings out-perform the S&P 500, Russell 1000 and Russell 2500

Our Top Companies	S&P 500 (Total Return)	Russell 1000 (Total Return)	Russell 2500 (Total Return)
145.0%	136.9%	131.7%	81.2%



Source: Concentus Wealth Advisors, May 1st, 2023

Our Portfolio of Winners (sample from 450+ companies)

While we work with organizations from all sectors of the global economy and have conducted research in 40+ countries and 15+ languages, we are not industry experts in anything but one area: revenue growth.

Since the late 1990's, we've been measuring customer expectations and how well companies and their rivals meet them. We also measure how much pricing power each company possesses, and which customer areas each company can improve to capture the most pricing power.

We especially value our executive relationships, where many have worked with us at multiple stops during their careers. This is a clear sign that our system not only works, but is an integral part of an executive's playbook to success.

Consumer Goods

Brown-Forman
Coca-Cola
Coors
Estee Lauder
Johnson & Johnson
Kellogg
Lexmark
Nike

Finance/Insurance

Aflac
Equifax
GE Healthcare
GEICO
MasterCard
Northwestern Mutual

Home & Travel

AirTran Airlines
Allied Waste/Republic
Builders FirstSource
Carnival Cruises
FedEx
Sikorsky Aircraft
The UPS Store

Media & Advertising

Anthony Robbins Co.
BBDO
ESPN

Telecom

AT&T / Cingular
Verizon

Retail/Food

Aramark
Burger King
Chili's
Dollar Tree
Men's Wearhouse
OfficeMax
Performance Food
PetSmart
Rite-Aid
Walmart

PE & Hedge Funds

Concinnity Group
CVC Capital
Diamondback
Mantle Ridge

Tech/Consulting

Cymer
Drucker Institute
Google
i2 Technologies
IBM
Oracle
SAP

Industrial/Materials

ADAMA
DLF Seeds
Finning/Caterpillar
Shrieve Chemical
Syngenta
Univar
Vixxo/FM Facility

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Breaking Away: It's A New Way of Thinking

We help companies leapfrog their rivals by infusing a completely new way of attacking customer value.

Rather than copying what your competitors are doing (or trying to do), we introduce a superior way to grow your revenue by introducing the only true competitor you have: What customers expect.

We measure customer expectations based on not only what they want you to do, but how they want to feel when you do it. Emotions drive customers off their status quo and create pricing power, two of the most critical aspects to revenue growth.

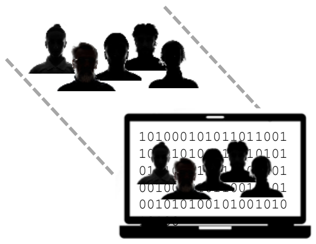
By setting the new rules of competition, you force rivals to continually play catch-up to your market position.

Your only true competitor is what customers expect.

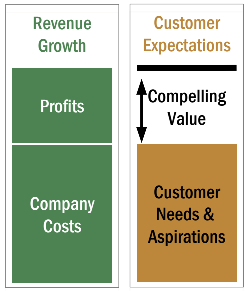
Be the one to set expectations by making the rules.

Steps to Revenue Growth

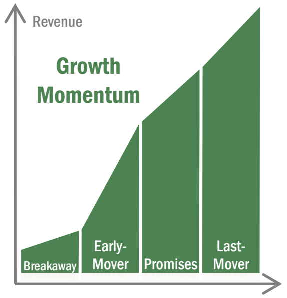
1 Build a digital twin of your customers (zero-party data)



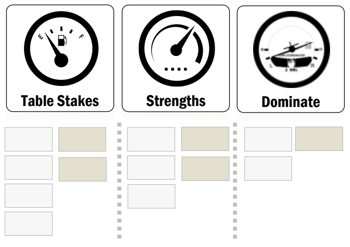
2 Find the customer ideal, compelling value & pricing power



3 Sequence initiatives to accelerate revenue growth



4 Create investment buckets to save costs & grow revenue



Winning Factors

THE W™ REPORT