



Gems of Knowledge

As yet another round of quarterly corporate earnings announcements comes to an end, we once again put our ears to the ground and provide a selection of our favourite quotes from company management.



It's Showtime

"WWE Raw is sports entertainment, which is right in the sweet spot of our sports business. Think of this as 52 weeks of live programming every week - every year. It feeds our desire to expand our live event programming. But most importantly, fans love it." Ted Sarandos, Co-CEO, Netflix.

Music is Life

"Q4 is a very strong quarter. Monthly active users up 28 million to 602 million. Subscriber growth continued to be above our historical trend and outperformed forecast." Paul Vogel, CFO, Spotify.



Millennial Magic I

"Coach delivered another standout quarter as our team continues to fuel brand desire by bringing expressive luxury to life. Overall, the success of these campaigns helped to support the acquisition of approximately 1.5 million new customers in North America, including a growing number of Gen Z and millennials." Joanne Crevoiserat, CEO, Tapestry.

Millennial Magic II

US Card member spending grew at 7% this quarter. We continue to see growth across all generations and age cohorts with Millennials and Gen Z customers again driving growth within this segment. Their spending was up 15% this quarter." Christophe Le Caillec, CFO, American Express.





Hey Mickey!



“Our Experiences business posted strong Q1 results primarily driven by our performance at Shanghai and Hong Kong theme parks. Every one of our parks was profitable in Q1, giving us an incredibly solid foundation to build upon as we invest significantly to turbocharge growth in this business.”
Robert Iger, CEO & Director, Disney.

Perfect Storm

“We have unsuccessfully tried to resume sailing in the Red Sea. Before returning again, we have to be absolutely certain that passage is safe. Even if we're still sailing around Africa a year from now, there will still be over capacity and pressure on prices.” Vincent Clerc, CEO, A.P. Møller – Mærsk.



Prancing Horse

“Our strong business performance in 2023 was sustained by a surprisingly strong personalisation uptick mainly driven by paints, liveries and the use of carbon.” Benedetto Vigna, CEO, Ferrari.

Taylor Who?

“And who could forget Taylor Swift, who chose an all-American Ralph Lauren look for the cover of Time magazine as their 2023 Person of the Year. These activations helped to fuel our strongest quarter of new consumer acquisition and brand affinity since the pandemic.” Patrice Jean Louis Louvet, CEO, Ralph Lauren.





Only in America



“We advanced our commitment to culinary innovation, a competitive strength of Shake Shack, including white truffle burgers, top-selling spicy fries and a return of bourbon bacon jam.” Randall Garutti, CEO, Shake Shack.

We’re about to enter ‘burrito season.’ Seriously.

“For the quarter, sales grew 15% to \$2.5 billion driven by an 8.4% comp. I’m thrilled to see the progress we are beginning to make, and continuing this momentum is critical as we approach our peak burrito season in mid-March. Our food is real and so are we!” Brian Niccol, CEO, Chipotle Mexican Grill.



ResMed

Interesting...

“Around 6 months ago, there was a thought among some in the market that patients on GLP-1 medications would be less likely to start positive airway pressure therapy. So now we have real-world data and real-world evidence at scale. Our analysis of over 529,000 patients with GLP-1 prescriptions shows that not only is there not a reduction in the propensity to start positive airway pressure therapy, it is the exact opposite.” Michael Farrell, CEO, ResMed.

And just in case anyone needs reminding

“AI is the most important technology that has come in the last 50 years.” Lisa SU, CEO, Advanced Micro Devices.

Accelerated computing and GenAI have hit their tipping points. Demand is surging worldwide across companies, industries, and nations.” Jensen Huang, CEO & Founder, Nvidia.

