

AI Global

Global Sector Trends on Generative AI

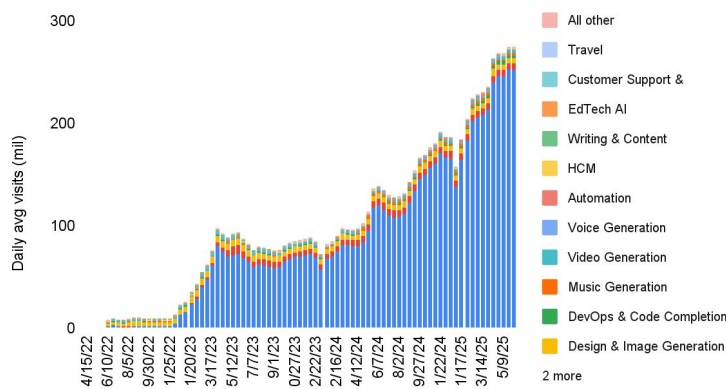
Data ending 6/6/25

INVESTOR INTELLIGENCE HEATMAP

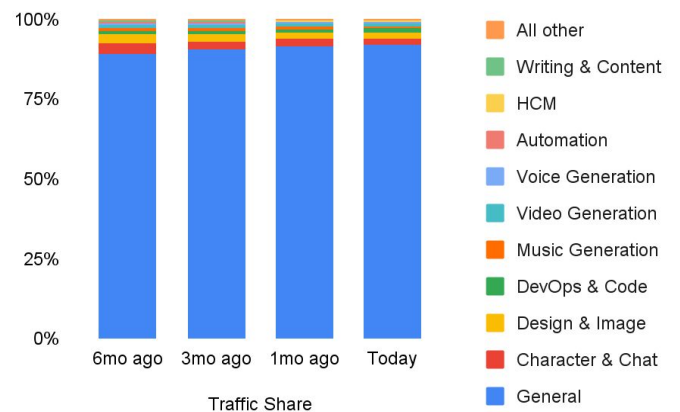
Generative AI Sites by Category

12wk Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6
General	-8%	4%	14%	18%	23%	25%	55%	46%	34%	22%	23%	21%
Character & Chat	18%	8%	-1%	4%	-1%	-5%	-7%	-5%	1%	-2%	-1%	-5%
Design & Image Generation	-10%	-4%	-1%	2%	8%	2%	12%	28%	2%	-6%	-11%	-8%
DevOps & Code Completion	56%	74%	83%	74%	73%	99%	127%	108%	105%	76%	66%	41%
Music Generation	-3%	-7%	-6%	-3%	-5%	-1%	-4%	7%	12%	10%	3%	-1%
Video Generation	-9%	3%	5%	15%	16%	8%	3%	9%	5%	-5%	-5%	1%
Voice Generation	-5%	9%	14%	11%	17%	15%	15%	7%	8%	8%	5%	14%
Automation	7%	32%	41%	53%	62%	53%	48%	19%	15%	4%	8%	12%
HCM	-21%	11%	16%	16%	31%	29%	52%	2%	-2%	-4%	4%	6%
Writing & Content	-23%	-13%	-7%	-11%	-9%	-6%	14%	-3%	-12%	-11%	-16%	-19%
EdTech AI	-18%	-9%	-11%	0%	5%	8%	6%	-7%	1%	-9%	-3%	-10%
Customer Support & Experience	-12%	-9%	-6%	-7%	-7%	-11%	5%	-4%	-11%	-12%	-11%	-15%
Travel	-38%	-23%	-17%	-17%	1%	15%	32%	16%	14%	-1%	-2%	1%
All other	-27%	2%	7%	8%	20%	21%	61%	6%	-12%	-15%	-15%	-19%
AI Tools Total	-7%	4%	13%	17%	22%	24%	50%	43%	32%	20%	21%	19%

Global AI Tools Traffic



Global AI Traffic Share



*Trend indicates 4wk YoY growth vs 12wk YoY growth

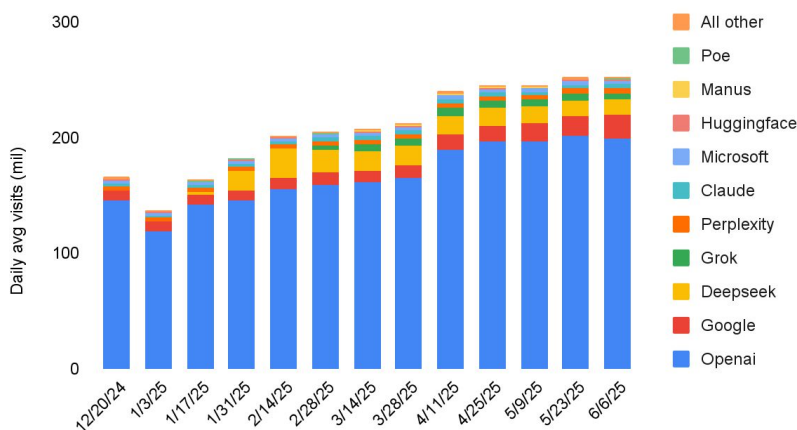
INVESTOR INTELLIGENCE HEATMAP

General AI Tools

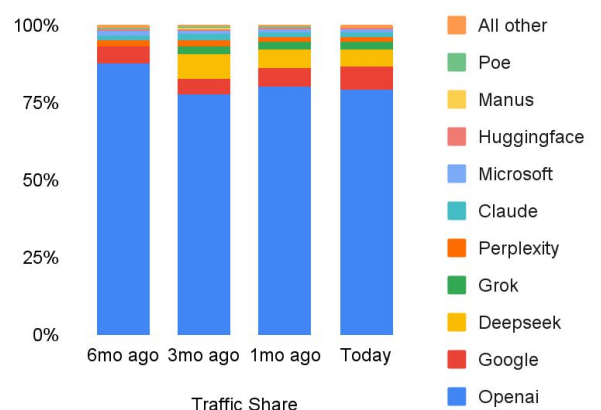
General AI tools, led by ChatGPT, perform a wide variety of automation tasks that incorporate the interpretation of human language and generate responses and insights commonly through a Chat or Search UI. Many general chat AI tools have free and paid layers that enable advanced queries and api integrations. Sectors that are potentially disrupted by General AI tools in its early stages include: Search, Discussion Forums, Social Media, EdTech.

12wk Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6
Openai	-9%	4%	5%	5%	9%	11%	38%	33%	35%	27%	26%	23%
Google	-18%	-11%	-1%	3%	15%	14%	50%	54%	53%	51%	58%	95%
Deepseek	1013%	3029%	17694%	17701%	8658%	6804%	1688%	532%	-6%	-41%	-26%	-20%
Grok	na	na	na	na	524539%	1096167%	169235%	25911%	11307%	5243%	64%	-2%
Perplexity	3%	8%	-5%	4%	25%	30%	52%	18%	11%	6%	0%	1%
Claude	-16%	-7%	-18%	-18%	2%	30%	61%	29%	25%	25%	14%	12%
Microsoft	23%	-15%	-14%	-15%	-6%	1%	23%	43%	29%	23%	30%	18%
Huggingface	16%	17%	53%	58%	42%	29%	26%	15%	-14%	-29%	-24%	-12%
Manus	na	na	na	na	na	na	na	na	na	na	na	-46%
Poe	-30%	-25%	-29%	-28%	-21%	-16%	-3%	-10%	-6%	-17%	-26%	-31%

General AI Tools Traffic



General AI Traffic Share



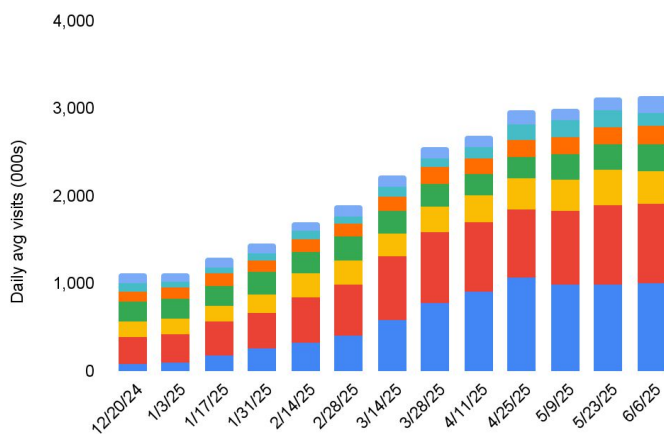
INVESTOR INTELLIGENCE HEATMAP

Code Completion & DevOps

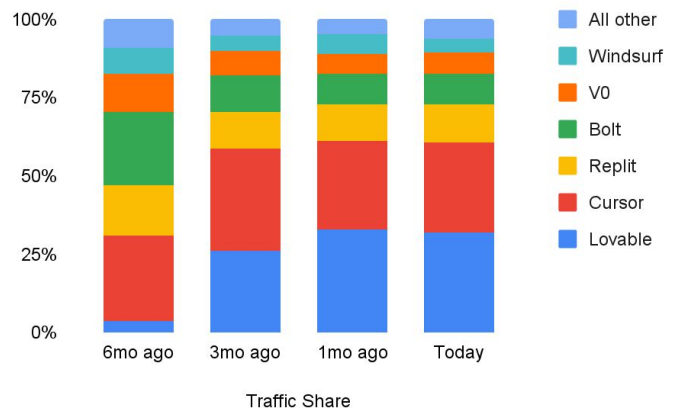
Code Completion & DevOps tools assist developers in writing, testing and debugging software code. These tools analyze existing code and predict the most likely next piece of code, which flagging potential errors, deprecations and areas to drive efficiency. Code completion tools are often embedded inside developer environments, and as a result, the standalone platforms listed below represent a sample of engagement using the available tools. Sectors that are potentially disrupted by Code Completion tools its early stages include: SaaS DevOps & Continuous Integration, Web & App builders, Freelance Platforms

12wk Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6
Lovable	10300%	17600%	12500%	2827%	926%	686%	651%	409%	322%	207%	148%	72%
Cursor	37%	83%	81%	106%	97%	128%	151%	106%	90%	62%	55%	25%
Replit	-12%	-3%	21%	49%	67%	55%	72%	73%	73%	31%	40%	45%
Bolt	258%	172%	80%	7%	4%	10%	10%	-2%	-7%	18%	12%	21%
V0	4%	20%	25%	27%	10%	47%	60%	45%	53%	28%	39%	21%
Windsurf	150%	160%	174%	30%	3%	11%	41%	59%	108%	104%	96%	34%
DevOps & Code Completion total	56%	74%	83%	74%	73%	99%	127%	108%	105%	76%	66%	41%

DevOps & Code Completion Tools Traffic



DevOps & Code Completion Tools Traffic Share



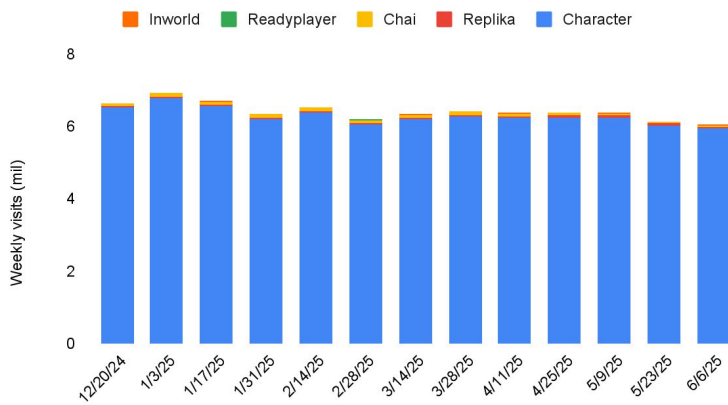
INVESTOR INTELLIGENCE HEATMAP

Character & Chat AI Tools

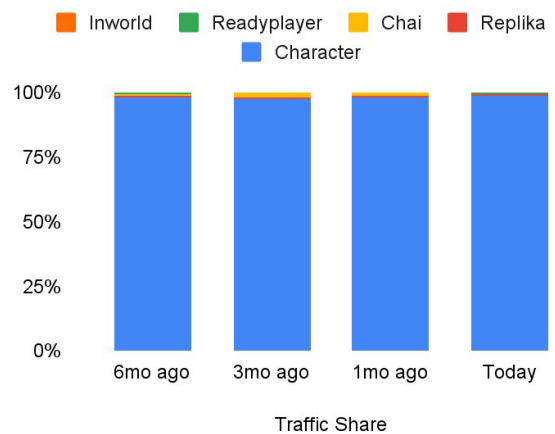
Character and Chat AI tools, led by Character AI, reflect derivations of the chat LLMs embedded in general AI, but are intended to learn and incorporate specific user language and mannerisms in order to mimic or replicate in natural settings. Sectors that are potentially disrupted by Character and Chat AI tools in its early stages include: Media, Entertainment, Sales & Marketing SaaS, EdTech.

12wk Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6
Character	17%	7%	-1%	3%	-1%	-5%	-8%	-5%	1%	-2%	0%	-4%
Replika	50%	35%	17%	1%	-17%	-7%	-7%	-3%	50%	19%	34%	-2%
Chai	119%	72%	49%	48%	31%	38%	15%	-6%	-25%	-38%	-50%	-59%
Readyplayer	-2%	-26%	-10%	-28%	-27%	-42%	-29%	-21%	-7%	10%	-17%	8%
Inworld	-15%	-25%	-16%	-11%	-5%	4%	34%	10%	24%	11%	3%	9%
Character & Chat total	18%	8%	-1%	4%	-1%	-5%	-7%	-5%	1%	-2%	-1%	-5%

Character & Chat AI Traffic



Character & Chat Traffic Share



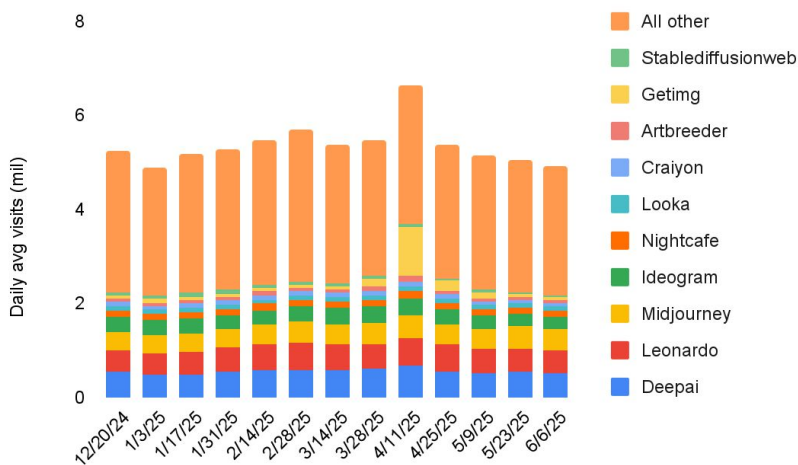
INVESTOR INTELLIGENCE HEATMAP

Design & Image Generation

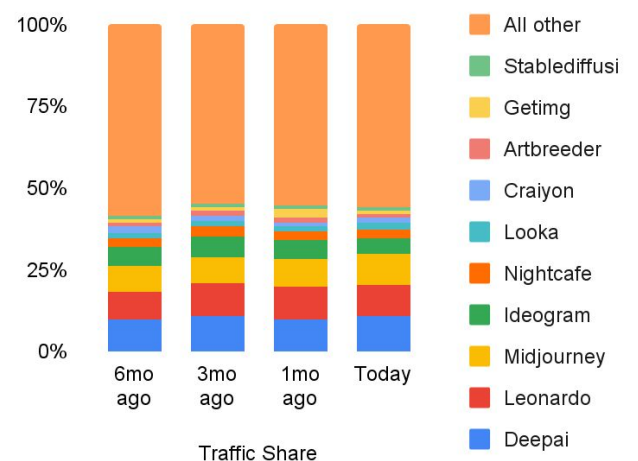
Design & Image Generation AI tools enable users to generate highly customized art and images, usually through text or a simple UI, and provide the opportunity to streamline the design process. Sectors that are potentially disrupted by Design & Image Generation tools in its early stages include: Creative & Marketing Agencies, Publishers, Web & App builders, Freelance platforms.

12wk Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6
Deepai	6%	5%	14%	10%	12%	10%	26%	34%	0%	-11%	-8%	-11%
Leonardo	-19%	-3%	2%	17%	31%	20%	17%	27%	15%	-9%	-15%	-13%
Midjourney	-4%	-4%	-4%	2%	9%	3%	10%	21%	7%	4%	9%	8%
Ideogram	-8%	-5%	-12%	-7%	4%	10%	15%	17%	11%	-3%	-19%	-27%
Nightcafe	-7%	-10%	-10%	-7%	-5%	10%	0%	2%	2%	-3%	-12%	-14%
Looka	-17%	-6%	6%	-1%	10%	16%	29%	9%	-9%	-10%	-9%	-7%
Craiyon	-4%	3%	-2%	-2%	-9%	-6%	-2%	0%	-10%	-16%	-10%	-12%
Artbreeder	-10%	6%	28%	43%	30%	17%	26%	100%	8%	-12%	-27%	-14%
Getimg	-2%	-11%	-6%	-8%	1%	-13%	155%	1532%	220%	114%	3%	-21%
Stablediffusionweb	33%	37%	34%	6%	-3%	-26%	-33%	-29%	-34%	-37%	-28%	-17%
All other	-13%	-7%	-3%	-1%	6%	-2%	6%	-1%	-5%	-7%	-13%	-7%
Design & Image Generation total	-10%	-4%	-1%	2%	8%	2%	12%	28%	2%	-6%	-11%	-8%

Design & Image Generation Traffic



Design & Image Generation Traffic Share



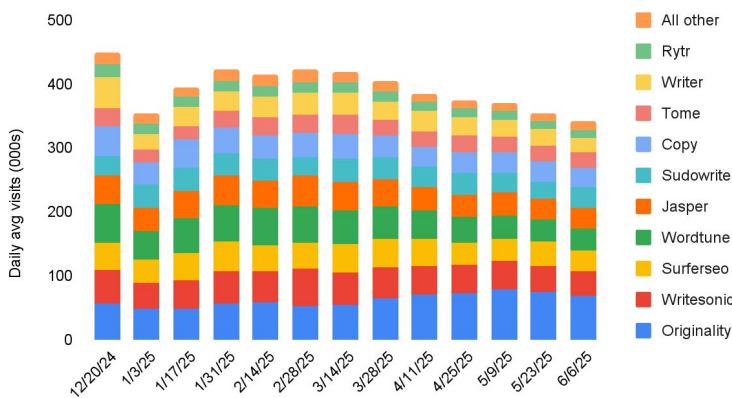
INVESTOR INTELLIGENCE HEATMAP

Writing & Content Generation

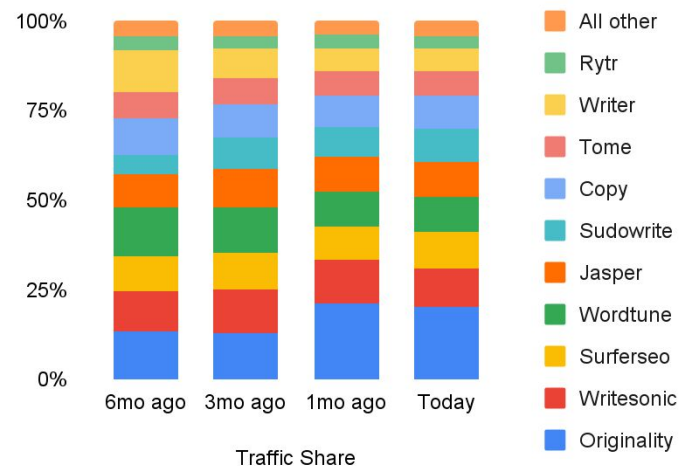
Writing & Content generation AI tools enable users to generate and analyze publications from short-form articles to longer-form essays and reports. Content can typically be manipulated through interactions with chatbots or adjusted stylistically in a simple UI. Sectors that are potentially disrupted by Design & Image Generation tools in its early stages include: Creative & Marketing Agencies, Communications & PR, Content Marketing, Journalism, Entertainment, Publishers, Freelance platforms.

12wk Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6
Originality	31%	24%	24%	8%	-15%	-3%	36%	45%	31%	36%	44%	29%
Writesonic	-28%	-16%	-2%	-1%	8%	-2%	14%	1%	-16%	-12%	-33%	-29%
Surferseo	-11%	4%	-1%	-14%	-7%	2%	29%	3%	-24%	-14%	-5%	-22%
Wordtune	-35%	-20%	-14%	-11%	-12%	-15%	12%	-20%	-29%	-35%	-40%	-35%
Jasper	-14%	2%	10%	2%	13%	4%	13%	-14%	-26%	-19%	-30%	-29%
Sudowrite	51%	36%	32%	50%	17%	13%	-3%	-10%	5%	-9%	-13%	-12%
Copy	-31%	-7%	-17%	-26%	-22%	-14%	0%	-32%	-25%	-15%	-16%	-19%
Tome	-48%	-51%	-28%	-27%	-11%	5%	20%	22%	0%	-11%	-13%	-23%
Writer	-55%	-42%	-45%	-43%	-37%	-29%	19%	0%	-6%	-24%	-26%	-37%
Rytr	-30%	-25%	-7%	-25%	-10%	-26%	-2%	-8%	-7%	1%	-27%	-17%
All other	-25%	-25%	0%	-1%	-6%	4%	2%	-18%	-34%	-30%	-28%	-22%
Writing & Content total	-23%	-13%	-7%	-11%	-9%	-6%	14%	-3%	-12%	-11%	-16%	-19%

Writing & Content Tools Traffic



Writing & Content Traffic Share



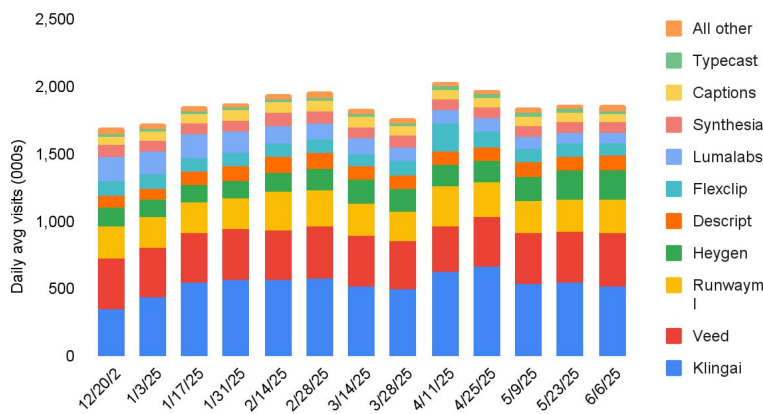
INVESTOR INTELLIGENCE HEATMAP

Video Generation & Editing

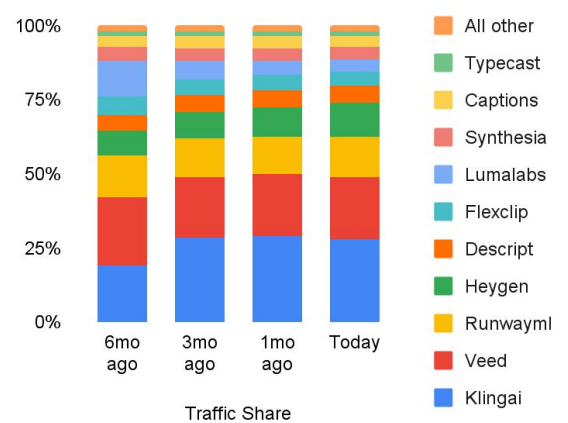
Video Generation & editing AI tools enable users to generate customized animations or live action simulated videos from text or simple UI, or quickly edit existing videos using user-defined stylistic parameters or instructions (e.g. time restrictions). Sectors that are potentially disrupted by Video Generation tools in its early stages include: Creative & Marketing Agencies, Entertainment, Social Media, Freelance platforms.

12wk Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6
Klingai	-8%	33%	58%	85%	76%	48%	13%	13%	16%	-5%	-5%	0%
Veed	-6%	-8%	-7%	-5%	1%	0%	-3%	-5%	-1%	2%	-2%	4%
Runwayml	-1%	0%	-3%	20%	10%	-1%	-3%	26%	13%	-15%	-10%	5%
Heygen	16%	14%	4%	8%	22%	31%	31%	27%	21%	25%	31%	28%
Descript	-5%	1%	8%	19%	32%	9%	17%	1%	-3%	-13%	-15%	1%
Flexclip	7%	-2%	-9%	-6%	-10%	-11%	8%	106%	12%	-4%	-4%	-2%
Lumalabs	-46%	-34%	-40%	-39%	-41%	-38%	-42%	-44%	-37%	-31%	-31%	-31%
Synthesia	24%	18%	13%	18%	9%	-4%	7%	-4%	-7%	-14%	-6%	-4%
Captions	7%	22%	25%	34%	34%	22%	15%	9%	-5%	-6%	-19%	-21%
Typecast	9%	2%	-6%	-11%	11%	6%	9%	13%	38%	43%	22%	15%
Video Generation total	-9%	3%	5%	15%	16%	8%	3%	9%	5%	-5%	-5%	1%

Video Generation Tools Traffic



Video Generation Traffic Share



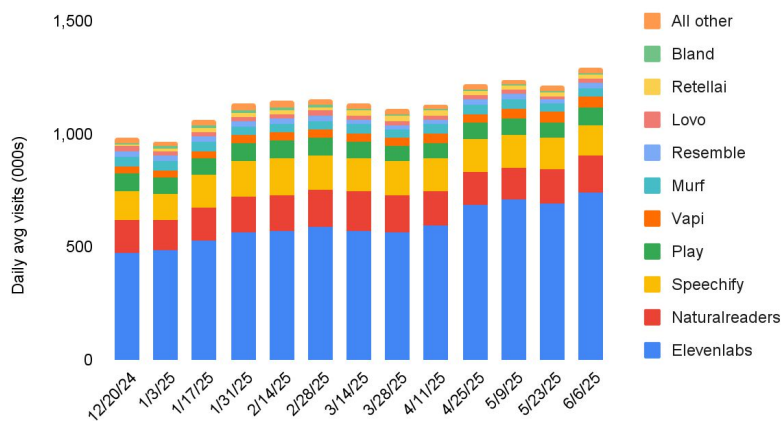
INVESTOR INTELLIGENCE HEATMAP

Voice Generation & Editing

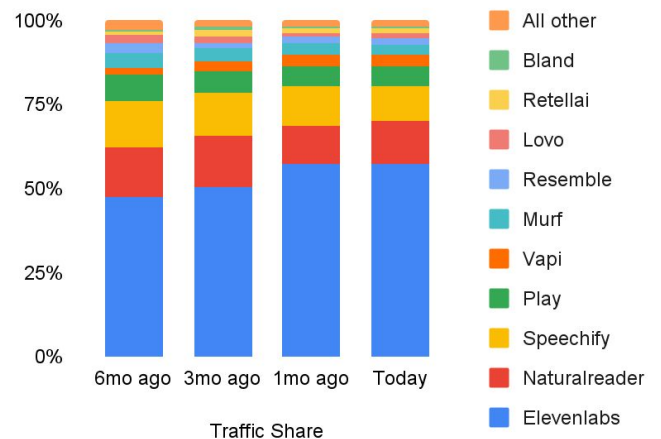
Voice Generation & editing AI tools enable users to generate natural audio from text or simple UI, or edit existing audio using user-defined stylistic parameters or instructions. Sectors that are potentially disrupted by Audio Generation tools in its early stages include: Creative & Marketing Agencies, Publishing, News & Entertainment, Social Media.

12wk Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6
Elevenlabs	5%	19%	21%	15%	26%	21%	18%	12%	22%	25%	17%	29%
Naturalreaders	-7%	4%	12%	10%	15%	23%	20%	5%	-8%	-9%	-6%	-5%
Speechify	-31%	-9%	11%	10%	12%	10%	30%	1%	-10%	-11%	-10%	-7%
Play	-17%	-19%	-19%	-11%	1%	-5%	-12%	-3%	-3%	-10%	-11%	4%
Vapi	9%	62%	67%	38%	54%	6%	38%	23%	16%	22%	33%	33%
Murf	7%	9%	-1%	-6%	-5%	3%	-11%	-5%	1%	8%	-10%	-12%
Resemble	3%	10%	15%	-11%	-22%	-26%	-31%	-13%	-10%	-2%	-15%	43%
Lovo	-13%	-23%	-14%	-18%	-1%	4%	7%	-3%	-6%	-20%	-33%	-7%
Retellai	156%	293%	166%	170%	72%	186%	71%	21%	4%	-10%	7%	-20%
Bland	-31%	-19%	4%	2%	1%	-3%	-5%	-27%	-21%	-40%	-19%	-12%
All other	2%	12%	19%	20%	0%	0%	1%	-14%	-17%	-30%	-24%	-10%
Voice Generation total	-5%	9%	14%	11%	17%	15%	15%	7%	8%	8%	5%	14%

Voice Generation Tools Traffic



Voice Generation Traffic Share



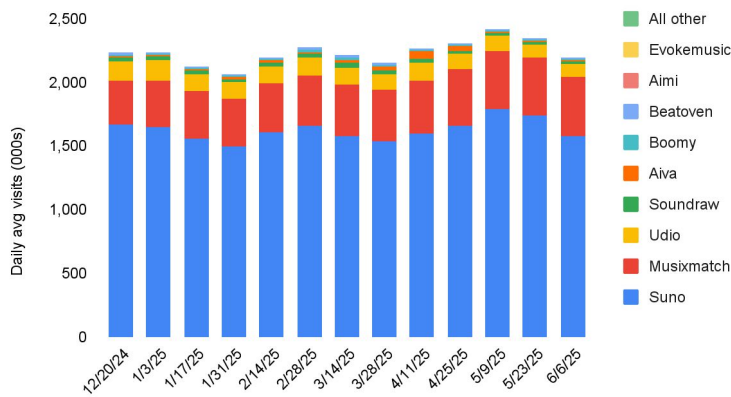
INVESTOR INTELLIGENCE HEATMAP

Music Generation

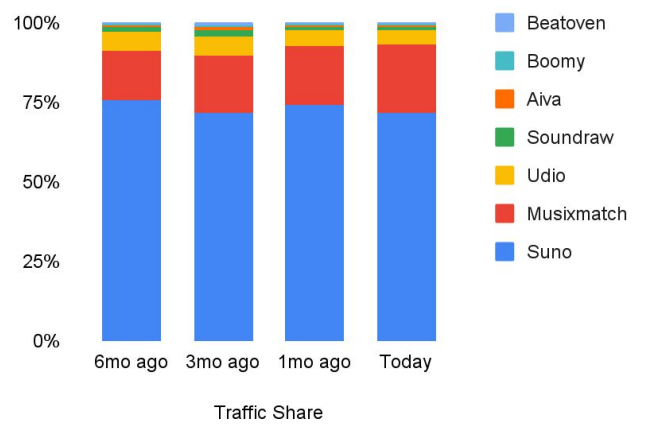
Music Generation AI tools enable users to generate compositions based on user-defined stylistic parameters and guidelines. Sectors that are potentially disrupted by Music Generation tools in its early stages include: Music Publishing & Licensing, Streaming Medi,

12wk Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6
Suno	-3%	-7%	-7%	-5%	-8%	-5%	-6%	3%	11%	12%	4%	0%
Musixmatch	8%	3%	3%	9%	8%	14%	9%	10%	18%	16%	18%	18%
Udio	-15%	-24%	-16%	-15%	-10%	-13%	-22%	5%	-3%	-12%	-25%	-23%
Soundraw	-19%	-21%	-15%	-14%	11%	65%	20%	6%	-20%	-30%	-41%	-54%
Aiva	-18%	-14%	-12%	3%	28%	43%	90%	293%	135%	-5%	-35%	-42%
Boomy	-7%	9%	30%	31%	61%	75%	63%	43%	-2%	-19%	-27%	-31%
Beatoven	-12%	-18%	-14%	-15%	51%	40%	10%	5%	22%	-17%	-42%	-58%
Music Generation total	-3%	-7%	-6%	-3%	-5%	-1%	-4%	7%	12%	10%	3%	-1%

Music Generation Tools Traffic



Music Generation Traffic Share



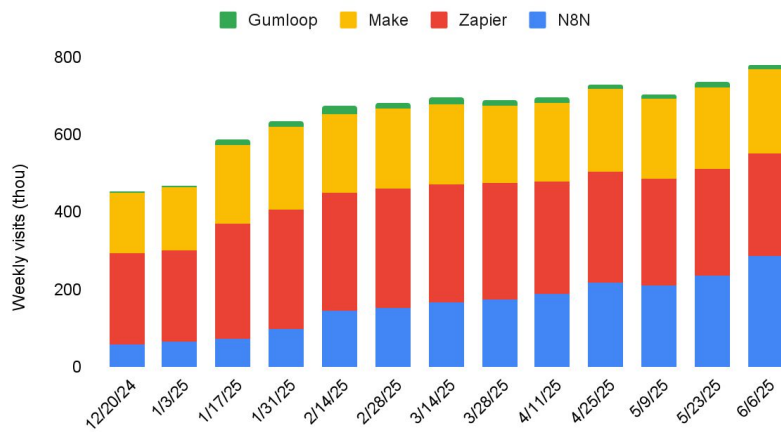
INVESTOR INTELLIGENCE HEATMAP

Automation

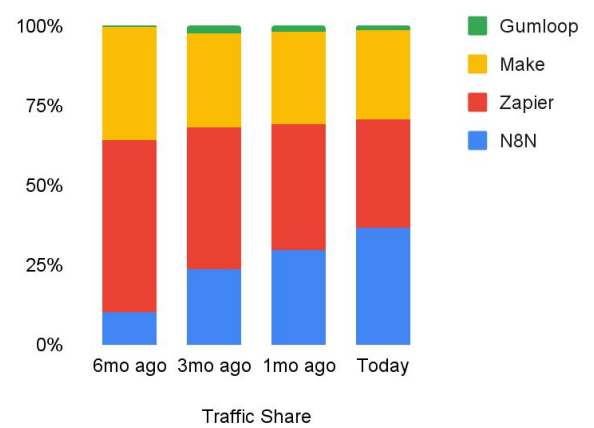
AI automation tools like n8n, Gumloop, and Zapier empower users to build workflows that connect apps, automate tasks, and orchestrate complex business logic with minimal or no code. These platforms are reshaping how teams approach operations, reducing the need for manual processes and developer resources. Sectors likely to be disrupted in the early stages include: IT Services, Operations & Process Management, and SaaS Integration Platforms.

12wk Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6
N8N	82%	89%	139%	215%	245%	178%	162%	160%	117%	46%	54%	72%
Zapier	-12%	15%	22%	24%	35%	30%	28%	-3%	-7%	-9%	-10%	-13%
Make	23%	43%	42%	41%	38%	34%	24%	1%	0%	0%	2%	4%
Gumloop	69%	326%	261%	515%	544%	251%	192%	7%	1%	-43%	-25%	-22%
Automation total	7%	32%	41%	53%	62%	53%	48%	19%	15%	4%	8%	12%

Automation



Automation

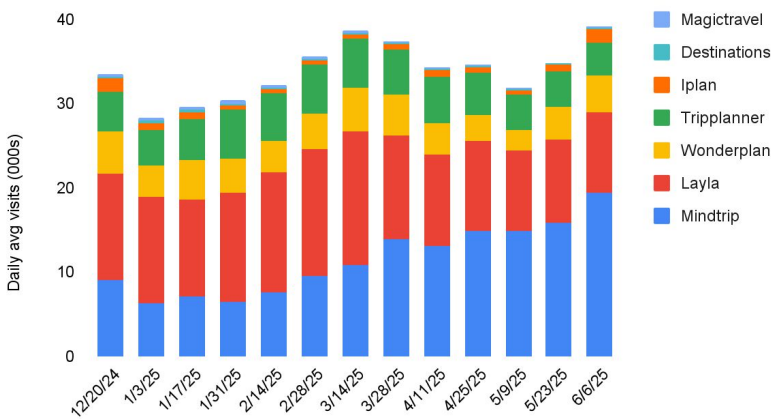
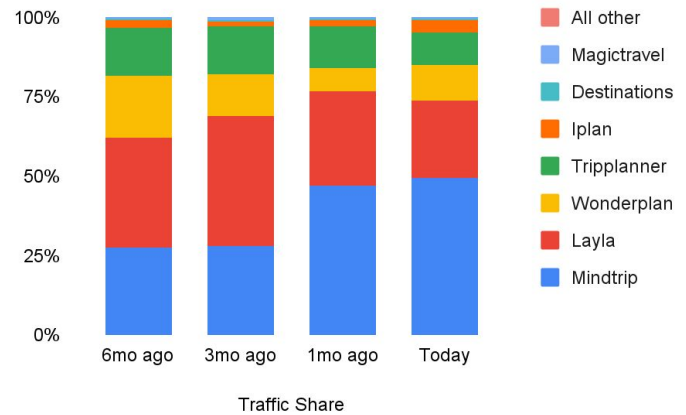


INVESTOR INTELLIGENCE HEATMAP

Travel

Travel AI tools help users plan, book, and optimize their travel experiences by leveraging natural language processing, real-time data aggregation, and personalized recommendations. These tools can automatically search for flights, hotels, and activities based on user preferences, and even handle itinerary changes or customer support. As these capabilities mature, sectors most likely to be disrupted include: Online Travel Agencies (OTAs), Corporate Travel Management, Concierge Services, and Customer Experience Platforms.

12wk Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6
Mindtrip	-31%	-7%	-14%	-13%	-2%	20%	118%	84%	127%	98%	67%	78%
Layla	-38%	-26%	-12%	1%	24%	25%	-1%	-5%	-17%	-34%	-34%	-40%
Wonderplan	-50%	-44%	-47%	-53%	-38%	5%	28%	-18%	-26%	-37%	-9%	-15%
Tripplanner	-38%	-9%	8%	-18%	7%	23%	27%	9%	-12%	-24%	-28%	-32%
Iplan	15%	45%	7%	-24%	-34%	-65%	-20%	2%	35%	8%	51%	158%
Destinations	-58%	-40%	-40%	-28%	-26%	-13%	-60%	-57%	-51%	-39%	-6%	73%
Magictavel	-24%	-37%	22%	61%	55%	-2%	-34%	-29%	-53%	-44%	-36%	-48%
Travel total	-38%	-23%	-17%	-17%	1%	15%	32%	16%	14%	-1%	-2%	1%

AI Travel Tools Traffic

AI Travel Tools Traffic Share


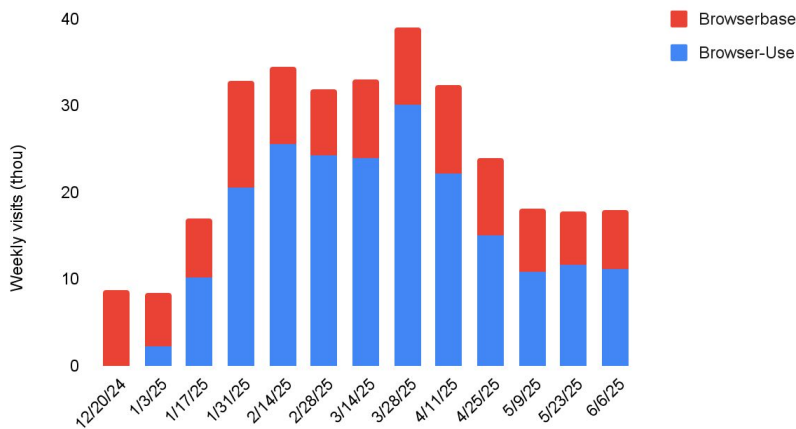
INVESTOR INTELLIGENCE HEATMAP

Browser

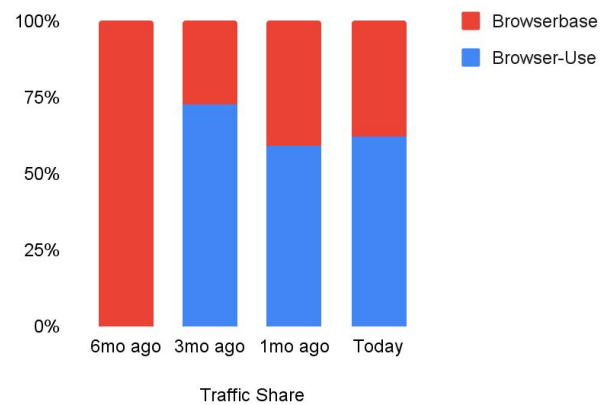
Browser automation tools like Browserbase and browser-use enable developers and AI agents to control headless browsers for tasks such as web scraping, form submissions, testing, and interacting with dynamic content. These tools allow for real-time browser control and visibility, making it possible to automate workflows that traditionally required human interaction. Sectors poised for disruption include: Data Aggregation & Research, Quality Assurance & Testing, Customer Support Automation, and eCommerce Operations.

12wk Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6
Browser-Use	na	na	na	na	na	na	1256%	117%	-26%	-58%	-52%	-53%
Browserbase	466%	483%	160%	232%	141%	4%	44%	50%	-27%	-17%	-20%	-25%
Browser total	655%	1363%	597%	1185%	911%	280%	372%	90%	-27%	-47%	-44%	-45%

Browser



Browser



DISRUPTED SECTORS



INVESTOR INTELLIGENCE HEATMAP

Disrupted Sectors by Category

YoY Change	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6	Trend
Digital Freelance	-24%	-19%	-20%	-20%	-20%	-18%	-18%	-20%	-19%	-17%	-17%	-14%	Rising
Stock Media	0%	2%	0%	3%	2%	0%	0%	-1%	-1%	0%	-1%	0%	Steady
Design Platforms	13%	17%	13%	18%	16%	13%	18%	20%	10%	13%	16%	16%	Steady
Discussion Forums	10%	7%	6%	6%	7%	5%	2%	-2%	0%	-3%	-5%	-5%	Falling
Web & Shop Builders	-11%	-9%	-11%	-10%	-12%	-11%	-9%	-11%	-13%	-12%	-10%	-10%	Steady
Traditional EdTech	-12%	-10%	-14%	-15%	-20%	-24%	-25%	-26%	-28%	-24%	-21%	-19%	Rising
Traditional Search	-1%	-1%	-1%	-1%	-2%	-2%	-1%	-1%	-2%	-2%	-3%	-3%	Steady

*Trend indicates 4wk YoY growth vs 12wk YoY growth

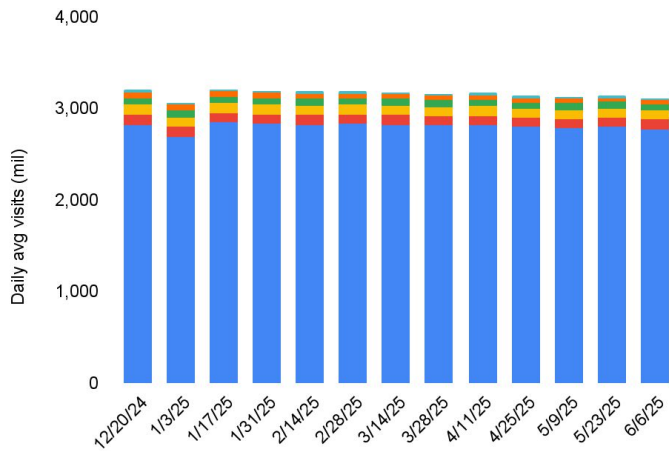


INVESTOR INTELLIGENCE HEATMAP

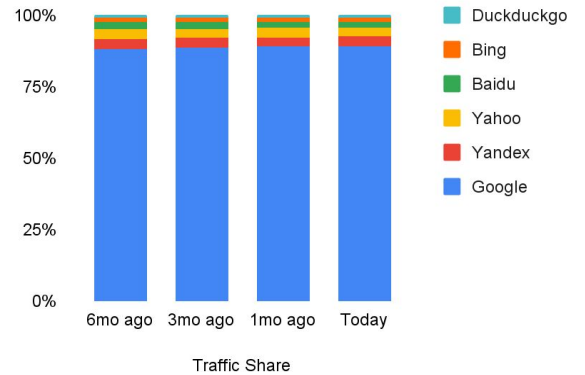
Traditional Search

Global Traffic YoY	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6	Trend
Google	-2%	0%	-1%	-1%	-1%	-1%	0%	-1%	-2%	-2%	-2%	-3%	Steady
Yandex	7%	5%	6%	6%	6%	6%	7%	7%	5%	7%	8%	8%	Steady
Yahoo	-6%	-6%	-6%	-5%	-7%	-8%	-8%	-7%	-11%	-12%	-14%	-16%	Falling
Baidu	-11%	-11%	-15%	-2%	-10%	-11%	-12%	-13%	-12%	-14%	-14%	-15%	Steady
Bing	18%	17%	18%	-2%	-4%	-7%	-8%	-9%	-18%	-14%	-10%	-10%	Steady
Duckduckgo	-6%	-3%	-3%	-3%	-1%	0%	-1%	-5%	-6%	-6%	-7%	-8%	Steady
Traditional Search	-1%	-1%	-1%	-1%	-2%	-2%	-1%	-1%	-2%	-2%	-3%	-3%	Steady

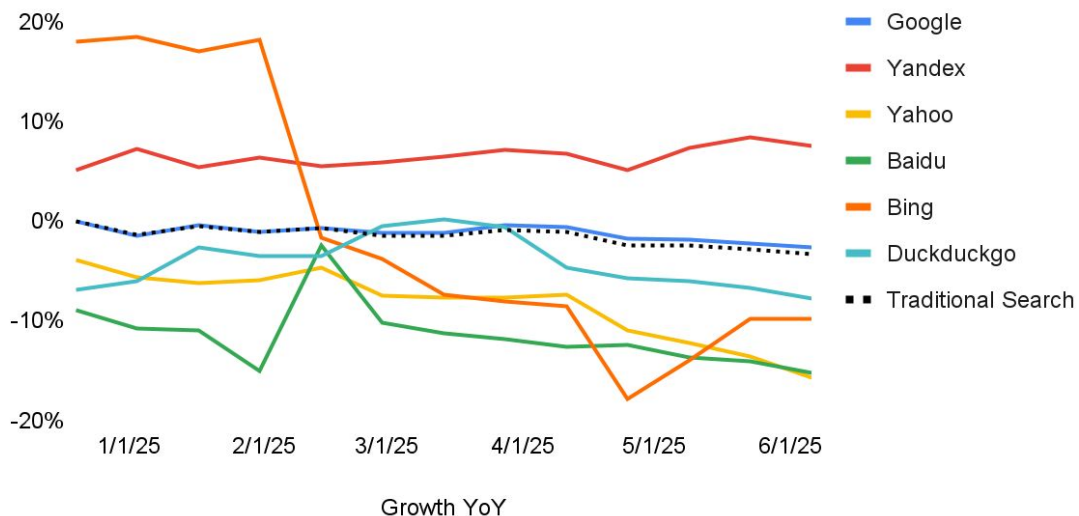
Traditional Search Traffic



Traditional Search Traffic Share



Global Traffic Growth YoY

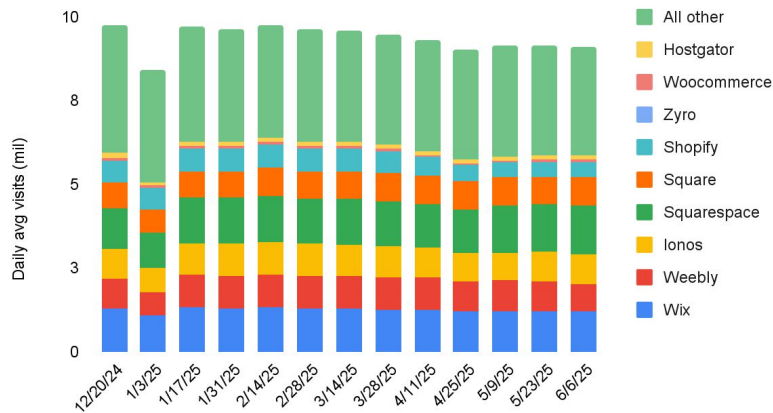


INVESTOR INTELLIGENCE HEATMAP

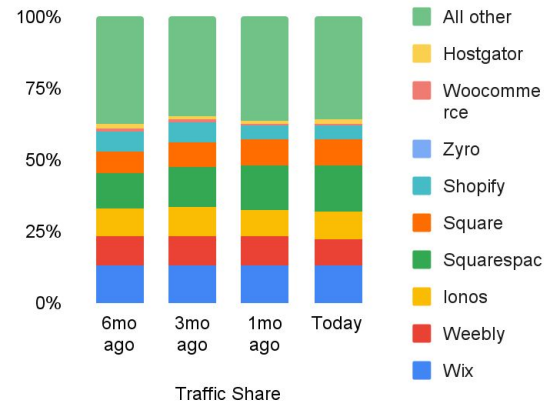
Web & Shop Builders

Global Traffic YoY	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6	Trend
Wix	-12%	-6%	-9%	-8%	-8%	-7%	-8%	-8%	-11%	-12%	-9%	-12%	Steady
Weebly	-26%	-20%	-23%	-21%	-23%	-23%	-20%	-21%	-28%	-23%	-22%	-21%	Steady
Ionos	-28%	-19%	-19%	-20%	-21%	-19%	-15%	-17%	-27%	-24%	-15%	-13%	Rising
Squarespace	-2%	8%	5%	4%	2%	5%	5%	4%	4%	14%	13%	11%	Rising
Square	-7%	0%	-1%	6%	-1%	4%	9%	3%	9%	5%	1%	8%	Steady
Shopify	-10%	-10%	-21%	-20%	-20%	-19%	-2%	-15%	-26%	-30%	-27%	-30%	Falling
Woocommerce	14%	3%	0%	0%	-2%	0%	4%	-5%	-39%	-40%	-37%	-33%	Falling
Hostgator	-26%	-4%	-14%	-6%	-20%	-19%	-18%	-14%	-15%	-8%	-12%	-5%	Rising
All other	-5%	-8%	-10%	-10%	-11%	-12%	-13%	-14%	-11%	-13%	-12%	-12%	Steady
Web & Shop Builders	-11%	-9%	-11%	-10%	-12%	-11%	-9%	-11%	-13%	-12%	-10%	-10%	Steady

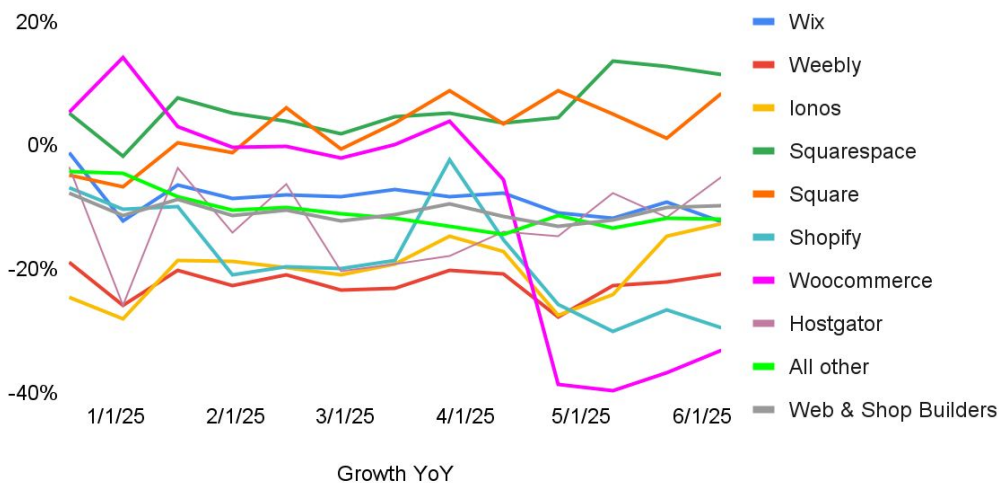
Web Builder Traffic



Web Builder Traffic Share



Global Traffic Growth YoY

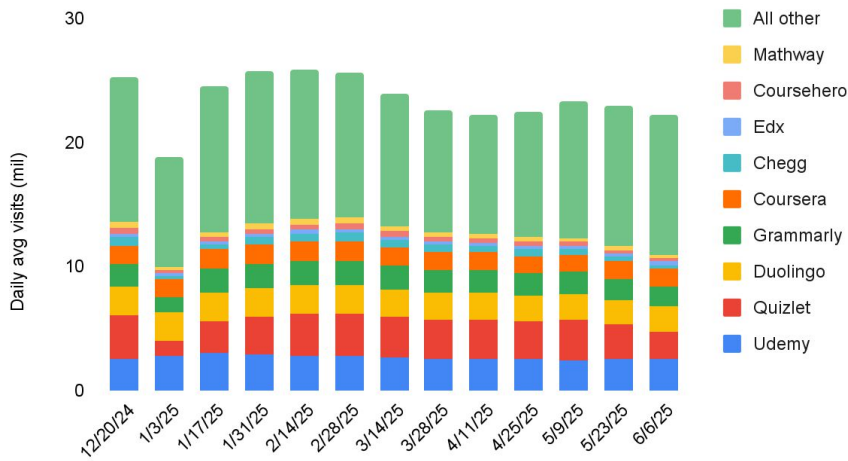


INVESTOR INTELLIGENCE HEATMAP

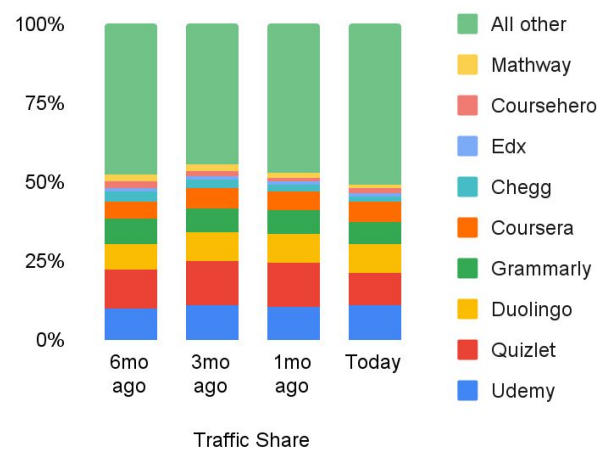
Consumer EdTech

Global Traffic YoY	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6	Trend
Udemy	-16%	-11%	-11%	-10%	-11%	-13%	-14%	-12%	-10%	-14%	-14%	-15%	Steady
Quizlet	-18%	-17%	-24%	-21%	-22%	-19%	-20%	-19%	-31%	-25%	-22%	-26%	Steady
Duolingo	-8%	-5%	-5%	-7%	-1%	-3%	-5%	-5%	-6%	-8%	-9%	-9%	Falling
Grammarly	-17%	-5%	-10%	-9%	-11%	-27%	-29%	-27%	-28%	-26%	-26%	-26%	Steady
Coursera	-17%	-10%	-7%	-8%	-8%	-9%	-8%	-7%	-9%	-13%	-12%	-11%	Steady
Chegg	-47%	-52%	-56%	-58%	-58%	-58%	-64%	-63%	-66%	-62%	-62%	-64%	Steady
Edx	-29%	-15%	-22%	-22%	-23%	-20%	-24%	-30%	-21%	-29%	-23%	-6%	Rising
Coursehero	-56%	-57%	-56%	-58%	-59%	-60%	-60%	-63%	-69%	-68%	-67%	-66%	Steady
Mathway	-27%	-34%	-37%	-37%	-40%	-40%	-44%	-46%	-54%	-57%	-57%	-59%	Falling
Babbel	-30%	-27%	-25%	-31%	-34%	-36%	-28%	-34%	-36%	-41%	-38%	-36%	Steady
All other	-3%	-2%	-5%	-7%	-18%	-25%	-26%	-28%	-27%	-20%	-16%	-12%	Rising
Consumer & Language EdTech	-12%	-10%	-14%	-15%	-20%	-24%	-25%	-26%	-28%	-24%	-21%	-19%	Rising

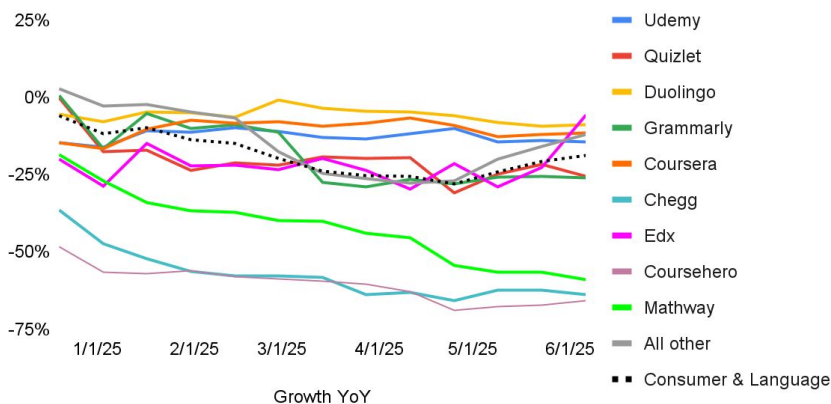
Consumer EdTech Traffic



Consumer EdTech Traffic Share



Global Traffic Growth YoY



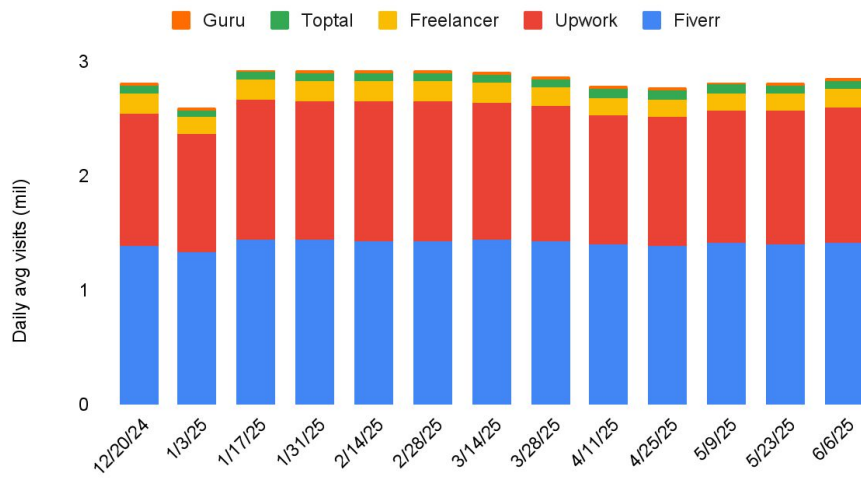


INVESTOR INTELLIGENCE HEATMAP

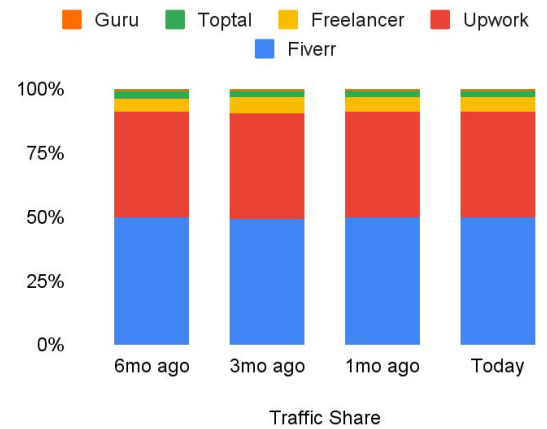
Digital Freelance

Global Traffic YoY	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6	Trend
Fiverr	-24%	-21%	-21%	-21%	-22%	-19%	-18%	-20%	-18%	-15%	-17%	-14%	Steady
Upwork	-22%	-17%	-18%	-18%	-18%	-17%	-18%	-19%	-20%	-19%	-16%	-14%	Rising
Freelancer	-22%	-9%	-8%	-14%	-15%	-14%	-15%	-21%	-18%	-13%	-19%	-16%	Steady
Toptal	-38%	-36%	-39%	-38%	-35%	-33%	-30%	-27%	-26%	-28%	-20%	-14%	Rising
Guru	-20%	-32%	-33%	-27%	-30%	-15%	-17%	-10%	-24%	-12%	-20%	-22%	Falling
Digital Freelance	-24%	-19%	-20%	-20%	-20%	-18%	-18%	-20%	-19%	-17%	-17%	-14%	Rising

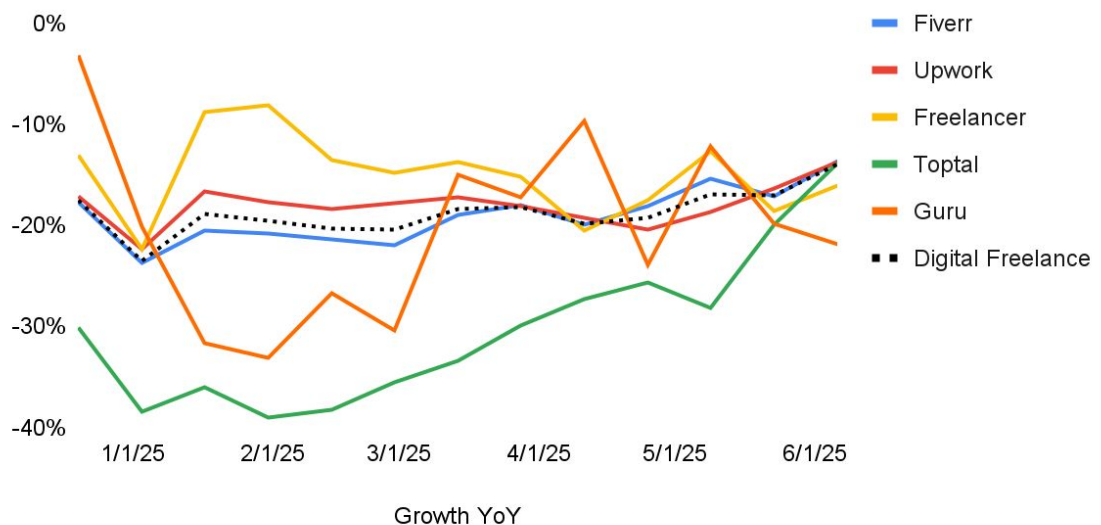
Digital Freelance Traffic



Digital Freelance Traffic Share



Global Traffic Growth YoY



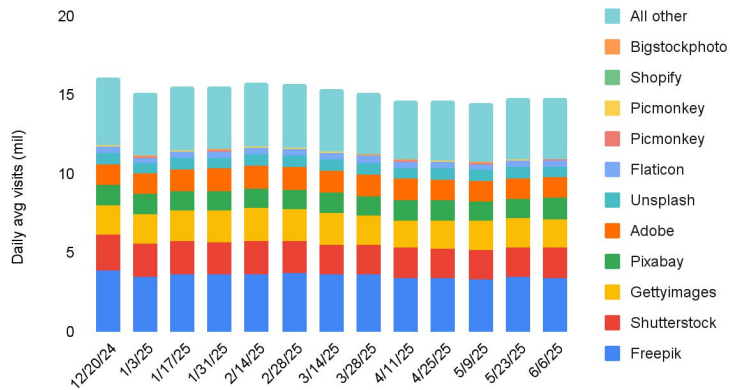


INVESTOR INTELLIGENCE HEATMAP

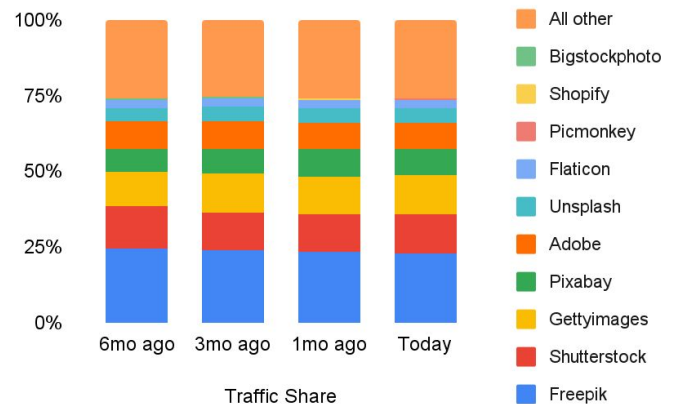
Stock Media

Global Traffic YoY	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6	Trend
Freepik	-9%	-5%	-6%	-2%	-1%	-4%	-1%	-2%	1%	0%	-2%	-2%	Steady
Shutterstock	1%	0%	-6%	-8%	-13%	-14%	-11%	-11%	-13%	-12%	-12%	-11%	Steady
Gettyimages	16%	21%	22%	30%	28%	27%	22%	17%	15%	20%	17%	13%	Falling
Pixabay	11%	15%	14%	17%	18%	20%	17%	18%	21%	18%	15%	22%	Steady
Adobe	5%	6%	7%	5%	-4%	-6%	-5%	0%	-4%	-5%	-9%	-3%	Steady
Unsplash	-25%	-22%	-23%	-17%	-14%	-13%	-10%	-13%	-12%	-12%	-13%	-12%	Steady
Flaticon	-8%	-3%	-2%	-2%	0%	-1%	-1%	-1%	0%	0%	0%	4%	Steady
Picmonkey	-17%	-33%	-37%	-38%	-33%	-39%	-38%	-39%	-40%	-40%	-36%	-36%	Rising
Shopify	9%	14%	7%	10%	9%	14%	19%	22%	22%	25%	20%	24%	Steady
Bigstockphoto	-19%	-23%	-29%	-11%	-17%	-13%	-19%	-21%	-17%	-40%	-58%	-66%	Falling
All other	5%	4%	1%	4%	3%	0%	-2%	-5%	-3%	-1%	0%	1%	Rising
Stock Media	0%	2%	0%	3%	2%	0%	0%	-1%	-1%	0%	-1%	0%	Steady

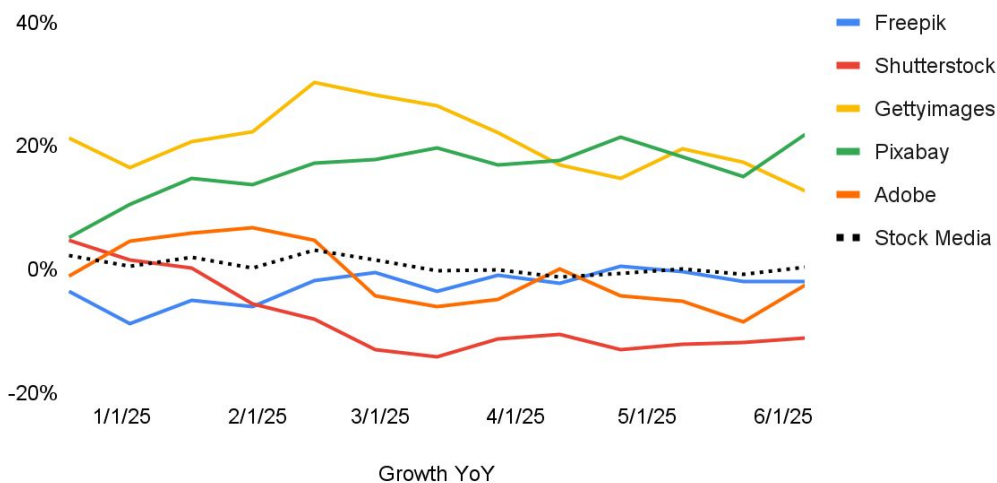
Stock Media Traffic



Stock Media Traffic Share



Global Traffic Growth YoY



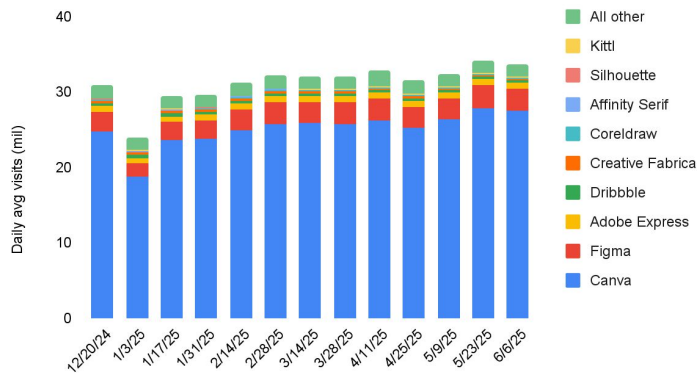


INVESTOR INTELLIGENCE HEATMAP

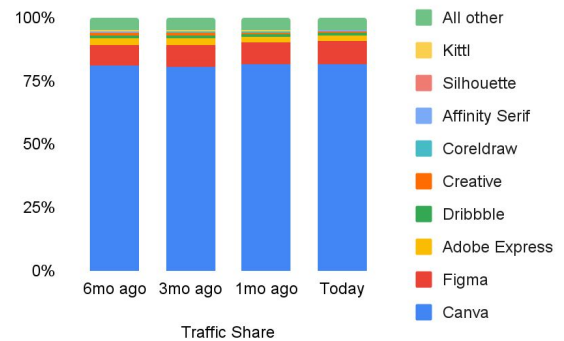
Design Platforms

Global Traffic YoY	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6	Trend
Canva	15%	20%	16%	21%	18%	15%	21%	21%	10%	15%	18%	19%	Steady
Figma	-2%	3%	-1%	8%	8%	5%	9%	10%	8%	7%	11%	11%	Steady
Adobe Express	8%	2%	8%	21%	19%	11%	14%	12%	19%	17%	23%	16%	Rising
Dribbble	3%	-4%	-10%	-7%	-8%	-4%	-4%	-9%	-14%	-17%	-17%	-23%	Falling
Creative Fabrica	11%	12%	13%	13%	8%	5%	-11%	-16%	-9%	-13%	-12%	-14%	Steady
Coreldraw	-27%	-22%	-20%	-20%	-20%	-24%	-28%	-28%	-29%	-31%	-23%	-23%	Rising
Affinity Serif	28%	17%	28%	17%	44%	10%	-17%	-8%	0%	22%	2%	-15%	Falling
Silhouette	-26%	-33%	-45%	-40%	-40%	-34%	-47%	-50%	-47%	-41%	-41%	-42%	Rising
Kittl	104%	68%	47%	66%	55%	58%	57%	28%	25%	11%	27%	1%	Falling
All other	9%	10%	10%	13%	16%	8%	9%	39%	16%	6%	1%	0%	Falling
Design Platforms	13%	17%	13%	18%	16%	13%	18%	20%	10%	13%	16%	16%	Steady

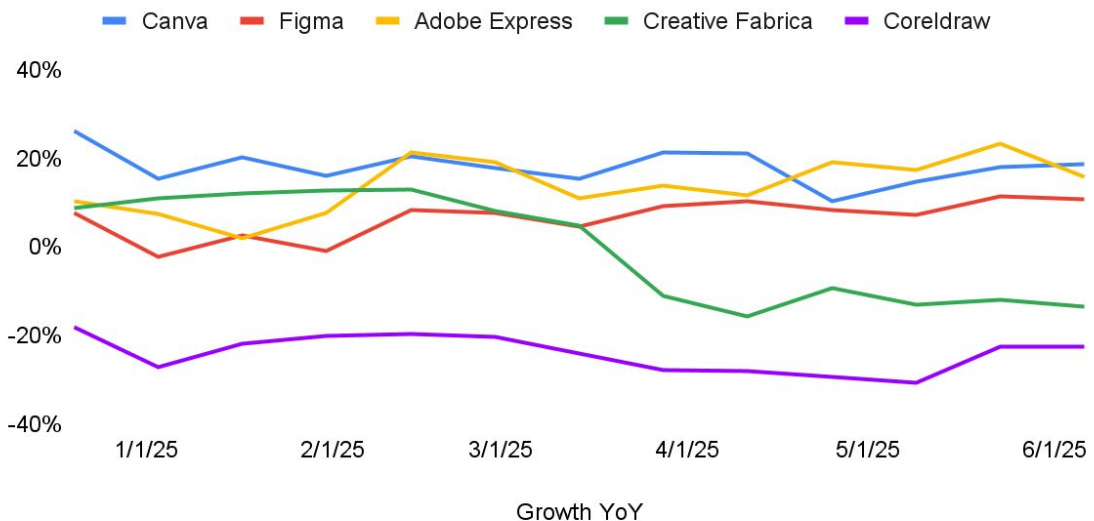
Design Platforms Traffic



Design Platforms Traffic Share



Global Traffic Growth YoY

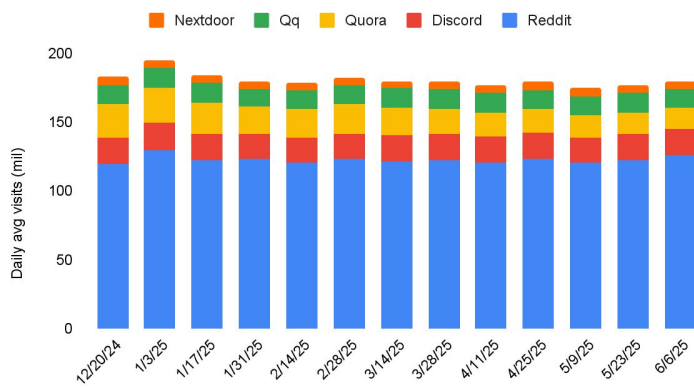


INVESTOR INTELLIGENCE HEATMAP

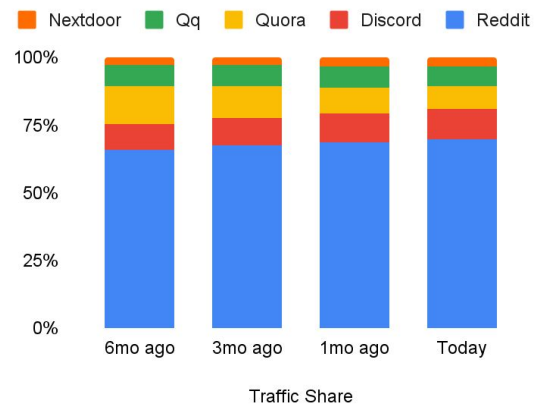
Discussion & Q&A Forums

Global Traffic YoY	1/3	1/17	1/31	2/14	2/28	3/14	3/28	4/11	4/25	5/9	5/23	6/6	Trend
Reddit	26%	25%	29%	26%	28%	25%	21%	17%	18%	13%	12%	12%	Falling
Discord	3%	5%	3%	-2%	0%	2%	1%	-2%	3%	-1%	0%	0%	Steady
Quora	-14%	-26%	-36%	-33%	-32%	-34%	-43%	-48%	-46%	-47%	-48%	-51%	Falling
Qq	-18%	-15%	-19%	-4%	-10%	-8%	-5%	-5%	-5%	-4%	-11%	-14%	Falling
Nextdoor	7%	-1%	-4%	-2%	-5%	-9%	-2%	-2%	-2%	-3%	-5%	-5%	Steady
Discussion Forums	10%	7%	6%	6%	7%	5%	2%	-2%	0%	-3%	-5%	-5%	Falling

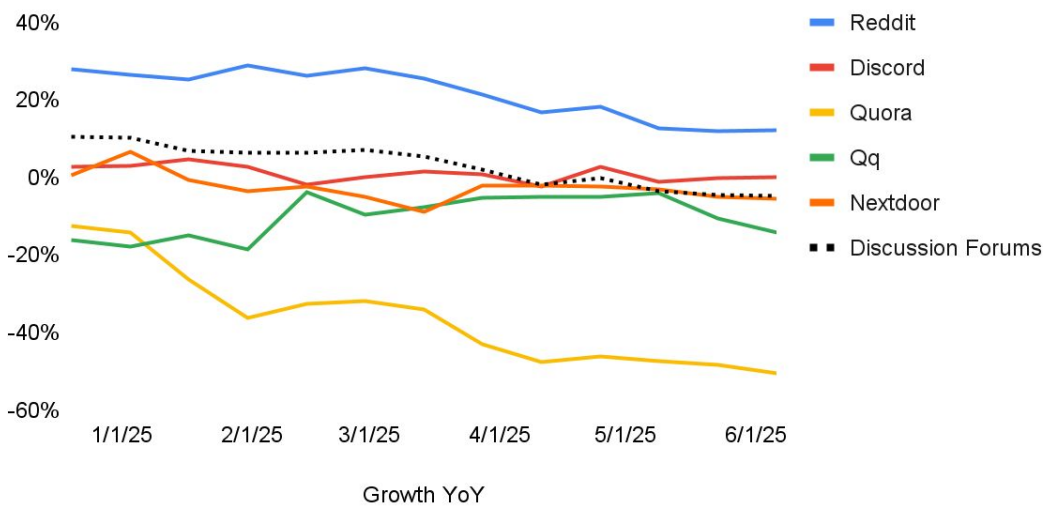
Discussion & Q&A forum Traffic



Discussion/Q&A Forum Traffic Share



Global Traffic Growth YoY





INVESTOR INTELLIGENCE HEATMAP

Appendix

- All heatmap values represent 12 wk change in total visits within 2wk increments