

The Daily: September's great big monthly advertising, media, and retail quiz—Retail media, genAI, and Google

Audio

On today's special podcast episode, we continue our monthly show where we discuss the biggest trends of the moment and the newest research, sprinkle in some analysis, and bundle it up into a quiz. Every month, three of our analysts representing their respective coverage area teams compete against each other. (We also encourage you to play along at home.) We keep a running score and will crown a winning team at the end of the year. Today, we cover retail media network investment and experimentation, the generative AI (genAI) bubble, and Google's dominance. Tune in to the discussion with this month's contestants: our vice president of content Suzy Davidkhanian, analyst Evelyn Mitchell-Wolf, and vice president of Briefings Stephanie Taglianetti.

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Episode Transcript:

Marcus Johnson:

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Evelyn Mitchell-Wolf:

But I think if YouTube didn't have a shorts offering, then all that time spent would be going to TikTok and Instagram. So, while shorts may indeed be cannibalizing some of that time spent from long-form content, which probably monetizes significantly better, at this point that product does need to be in place.

Marcus Johnson:

Hello everyone, and welcome to the Great Big Advertising Media and Retail Quiz of the month September, 2023 is the year. A special episode of the Behind the Numbers Daily, an eMarketer podcast made possible by Awin. This is our monthly show that discusses the biggest trends of the moment and newest research and bundles it up into a quiz with some analysis sprinkled in. I'm your host, Marcus Johnson. How does this episode work? Well it's a big game show, and every month three of our analyst teams, one, media and advertising, two, retail, and three, social and tech, face off. We're keeping a running score and at the end of the year we crown a winning team who win a gift card each and of course claim the Academy Award of the analyst world, the Victoria Cup, a trophy designed in pottery class by our very own Victoria who edits the show. The quiz has three rounds. Whoever has the most points wins the gold medal, three super-duper points for their team's running total. Second place takes the silver, and two super-duper points. And third place gets you a look of shame, and a barely-even-worth-it one super-duper point.

Let's meet this month's contestants who are representing the different teams. We start, of course ... Well not of course. We have to start with someone and they're first. From our digital advertising and media team, senior analyst based out of Virginia, it's Evelyn Mitchell-Wolf.

Evelyn Mitchell-Wolf:

Wow. I thought it was going to be such a great shining moment-

Suzy Davidkhanian:

No.

Evelyn Mitchell-Wolf:

For me. And then you just-

Suzy Davidkhanian:

Instantly deflated.

Marcus Johnson:

I thought it was a good intro. Wasn't it?

Evelyn Mitchell-Wolf:

Nah. It's like, "And now announcing this person because I have to and not because I want to."

Marcus Johnson:

Someone's got to be first.

Evelyn Mitchell-Wolf:

"Don't really like them."

Suzy Davidkhanian:

I thought it was an excellent introduction.

Evelyn Mitchell-Wolf:

Oh, you're not getting extra points for that.

Marcus Johnson:

Thanks Suzy. You don't get extra points, but thank you. Next up-

Evelyn Mitchell-Wolf:

Tell it like it is.

Marcus Johnson:

Is that very voice you're listening to, representing the retail team VP of content based out of New York City. It's Suzy Davidkhanian.

Suzy Davidkhanian:

Hi everyone.

Marcus Johnson:

Hello there. And finally holding it down for the social and tech team, VP of briefings based in New Jersey, ladies and gentlemen, Stephanie Taglianetti.

Suzy Davidkhanian:

I want that mug. I want that cup. I want that cup.

Marcus Johnson:

What mug?

Stephanie Taglianetti:

There's also a gift certificate-

Evelyn Mitchell-Wolf:

What mug?

Stephanie Taglianetti:

I didn't know.

Marcus Johnson:

We're not giving away a mug.

Suzy Davidkhanian:

It's a [inaudible 00:03:03] a cup?

Marcus Johnson:

It's a full-blown trophy.

Suzy Davidkhanian:

It's not a cup?

Marcus Johnson:

It's the Victoria Cup, like the Stanley Cup. It's not-

Evelyn Mitchell-Wolf:

You'll be able to drink out of it-

Suzy Davidkhanian:

Oh, I thought it was a drinkable cup.

Marcus Johnson:

[inaudible 00:03:14] actual cup.

Stephanie Taglianetti:

No, you're getting a gift certificate.

Marcus Johnson:

Oh, Stephanie's out.

Suzy Davidkhanian:

I'm so disappointed.

Marcus Johnson:

Victoria.

Victoria:

No, don't be disappointed. There will be a cup. You will Be able to drink out of it. Like the Stanley Cup. I have a big plans.

Suzy Davidkhanian:

Do people drink out of the Stanley Cup?

Marcus Johnson:

Maybe I've oversold this. Maybe it's going to be smaller than I thought. All right, all right. It will be-

Suzy Davidkhanian:

It's a giant cup.

Marcus Johnson:

It will be a giant ... Like a goblet? What we talking here. I haven't really asked.

Evelyn Mitchell-Wolf:

Picture the Stanley Cup and make it less-

Marcus Johnson:

Bigger?

Evelyn Mitchell-Wolf:

Beautifully crafted.

Marcus Johnson:

Okay. Wow. That's-

Victoria:

Then that's what I'm providing-

Suzy Davidkhanian:

That's what I want. That's exactly what I want.

Marcus Johnson:

That's too much coffee.

Evelyn Mitchell-Wolf:

But, I'm sorry, the trophy cup has to be shared with the team. But did I also hear that there are gift certificates and awards like the-

Victoria:

You said that.

Marcus Johnson:

Everyone gets a gift card. This is like the ninth time you've been on the quiz-

Suzy Davidkhanian:

Yeah, the gift card.

Marcus Johnson:

I say every time.

Suzy Davidkhanian:

Where ... Wait, no. I've never heard of the gift card.

Evelyn Mitchell-Wolf:

Me either.

Marcus Johnson:

Everyone gets a gift card.

Suzy Davidkhanian:

I've only heard of the cup, which I thought was a functional cup.

Marcus Johnson:

It's because you guys never listen. Everyone gets a gift card and we'll just say the best player from the team gets to take the cup.

Evelyn Mitchell-Wolf:

Wow.

Marcus Johnson:

Or maybe we'll put it in the office.

Suzy Davidkhanian:

I'm going to take it home. I'm so excited.

Marcus Johnson:

You haven't been the best player.

Suzy Davidkhanian:

It'll match this.

Marcus Johnson:

Oh, put that away Suzy, for the ... Suzy's showing this-

Suzy Davidkhanian:

Amazing Auntie.

Marcus Johnson:

Tiny trophy that one of her nieces gave her, to make her feel better.

Suzy Davidkhanian:

It's because he loves me.

Marcus Johnson:

You can be be your own team. You can keep track of your points total and match your score against these three folks to see if you beat them. Before we start, let's check in on the overall team scores thus far. We started the quiz in April, so after five months, five games, digital ad and media is in third place with eight super-duper points. Retail are second with 10. And currently in first place, in part thanks to Stephanie Taglianetti-

Stephanie Taglianetti:

It was literally because of me.

Marcus Johnson:

Social and tech with 12 super-duper points.

Stephanie Taglianetti:

I brought us ... I broke the tie.

Marcus Johnson:

She's been carrying the team-

Stephanie Taglianetti:

I've been carrying it on my back.

Marcus Johnson:

That's the overall super-duper points scores, but we of course start the in-game scores with everyone at zero. Victoria who edits the show and fashions the trophy will also be keeping score. She basically does everything. This show would go up in flames if V wasn't around, so thanks V for being around. All right, let's get to the first round, I Never News That. That's what it's called.

Suzy Davidkhanian:

That's a good one. As if we've never played before. I didn't know that was the ... I was on the first episode.

Marcus Johnson:

We were still called that. I can't ... All right. In this round, as Suzy should know by now, we discussed the biggest stories at the moment with a question tied to each. Folks have five seconds to send me their answers via Slack. One point if you're correct, no points if you're wrong. Four questions, here's your first story, first related question. So long-form versus short-form video is what we're talking about, according to recent estimates by Magnet Global, advertisers will spend \$47 billion on long-form video this year. Less than half, \$19 billion, is spent on short-form. But short form is growing faster, expected to climb by nearly 5% this year and 10% next. Long-form by contrast will fall 5% this year and be flat next year.

But the question is senior staff at which social platform recently said they will worried that its short video offering was cannibalizing and drawing away viewers from its long-form video content on the platform ... According to the Financial Times. The question being senior staff at which social platform recently said they were worried that its short video offering was cannibalizing and drawing away views from its long-form video content on the platform. Answers are in. Evelyn says YouTube, Stephanie says YouTube, and Suzy says YouTube. It is indeed YouTube. So well played, folks. Get a point apiece to start things off. What do we

think? Any thoughts on the relationship between short-form and long-form video on social platforms?

Evelyn Mitchell-Wolf:

I mean it's interesting because from a time spent perspective, yes, short-form video is ... It typically comes out of the same leisure time that a consumer could alternatively use to watch long-form content. So of course there is competing interests there. But I think if YouTube didn't have a shorts offering, then all that time spent would be going to TikTok and Instagram. So while shorts may indeed be cannibalizing some of that time spent from long form content, which probably monetizes significantly better, at this point that product does need to be in place.

Marcus Johnson:

Yeah, it's kind of the platforms have forced their hand as opposed to heading in this direction on their own. Something is going on at YouTube at least. Year-on-year growth has been negative for three out of the last four quarters for YouTube, so it's not making as much money as it was. Could be a handful of reasons, but it's definitely something that it's having to deal with. Let's move to our second question here, talking about gen AI. Has the generative AI bubble already burst? Sarah Morrison of Vox questions whether the AI boom is already over, noting that generative AI tools are garnering less interest than just a few months ago? The new AI-powered Bing hasn't made the immediate inroad some folks were expecting. Chat GPT has lost some of its initial shine, and basic errors have made them impossible to trust, generative AI that is.

However, that said, which AI company recently became the fifth US publicly traded firm to join the Trillion Dollar Club in terms of stock market value? Joining Apple, Microsoft, Alphabet, and Amazon, which AI company recently became the fifth US publicly traded firm to join the Trillion Dollar Club in terms of stock market value joining Apple, Microsoft, Alphabet, and Amazon?

Suzy Davidkhanian:

Wait, are you going to give us a choice?

Marcus Johnson:

No, this is not sport for multiple choice. That's the next round.

Suzy Davidkhanian:

Oh.

Marcus Johnson:

Suzy, you're killing me. You didn't get a multiple choice in the first question. Why would you get on this one?

Suzy Davidkhanian:

Because the first one was so easy and this one-

Stephanie Taglianetti:

Yeah. I'm guessing.

Marcus Johnson:

It's not done according to difficulty, it's done according to round. Okay, Suzy's hazard a guess. Evelyn says Nvidia. Stephanie says OpenAI. And Suzy says Amazon.

Suzy Davidkhanian:

Because they just bought someone, that's why.

Evelyn Mitchell-Wolf:

They invested-

Suzy Davidkhanian:

Yeah.

Evelyn Mitchell-Wolf:

About a billion dollars in Anthropic.

Suzy Davidkhanian:

Oh I thought four.

Evelyn Mitchell-Wolf:

It's up to four. They haven't-

Marcus Johnson:

Yeah.

Evelyn Mitchell-Wolf:

I think it's conditional.

Marcus Johnson:

The problem with Amazon being your answer, Suzy, is that I said joining Apple, Microsoft, Alphabet, and Amazon.

Suzy Davidkhanian:

Shoot, I was waiting for the multiple choice and so I didn't pay attention to the ones you said.

Evelyn Mitchell-Wolf:

She clearly stopped listening.

Suzy Davidkhanian:

I actually knew that Amazon was already a trillion, so I was like, "It's kind of a weird question you're asking me, but okay."

Marcus Johnson:

It's a weird answer is what it is. Okay, well Evelyn is correct. It is indeed Nvidia or Nvidia, however you say it. OpenAI is a good guess though. Amazon is not.

Suzy Davidkhanian:

Because it already is. It's not even a guess. It's reality. It's a fact.

Marcus Johnson:

Yes. It's reality.

Stephanie Taglianetti:

It's still very wrong, Suzy.

Marcus Johnson:

It is still wrong. Nvidia, they've ... Such a significant player in AI and a number of folks may not have heard of it, but yes, joined the Trillion Dollar Club. It's top five in terms of market value in the US, it's top eight in the world. And according to the New York Times, Nvidia/Nvidia, is said to have over 70% of the market share for AI chips. So a big deal now and even bigger deal going forward.

Let's move to our third question of the first round. Onwards and upwards for retail media network investment. On a recent episode of our Re-imagining Retail Show, host Sarah Libo noted that nearly nine in 10 marketers reported that their companies plan to maintain or increase spending on retail media in 2024. According to Skai State of Retail Media report, "Next year, we expect retail media to grow 23%, a few points faster than this year." The question is which grocery delivery company with a growing retail media network business recently had a much anticipated IPO? Which grocery delivery company recently had a much anticipated IPO? Evelyn says Instacart, Stephanie Instacart, and hopefully Suzy says Instacart. It's true, Instacart is the correct answer. They just IPO-ed. A point each for all of you. Suzy, we've been keeping an eye on this for a long time, and whilst I don't believe we're fashioning a full episode out of this, what are some of your thoughts on Instacart finally IPO-ing?

Suzy Davidkhanian:

I mean we've been talking about it for so long and I think they were waiting. So many of the IPOs have gone bust, right? And so I think they were trying to find the right economic time. Like, the world is falling apart, I think they were all ready to go and they were just waiting. And then they realized, "Now the government is going to shut down. The student debts are back in." There's so many things happening that there's never going to be a good time. I don't know if they did it on purpose last week when it was grocery shop. I don't know if we're giving the Hive group a little bit too much credit, but their timing was great because it's all we talked about last week at the conference.

Marcus Johnson:

Yeah. They are the fastest growing retail media network that we track, growing 43% this year. And yeah, starting from a smaller base but not the smallest base out there. So yeah, pretty healthy in terms of the growth of retail media networks. Let's move to our final question of the round. Google's antitrust trial begins, and it started on September 12th. The Department of Justice's lawsuit against Google's search engine Monopoly is the first antitrust trial that goes

after a big tech company's business practices since the DOJ took on Microsoft in the late '90s, notes Sarah Morrison of Vox. This one's a big deal as Google has continued to shape the internet since it was founded in a Stanford dorm room.

But the question is which birthday did Google recently celebrate? Which birthday did Google recently celebrate? Answers please. Stephanie ... There it is. Evelyn says 25th. Stephanie says 20th. And Suzy says 30th. They're all close-ish, but Evelyn is correct. It's their 25th birthday they just celebrated-

Suzy Davidkhanian:

Dang it.

Marcus Johnson:

So one point to Evelyn. Very nice, Evelyn. Yeah, me and Evelyn going to be talking about the details of Google's trial and what it means for the future of the internet this coming Monday, October 2nd. So come hang out with us for that episode. But in the meantime, we've come to the end of the first round. Let's check those scores. So Evelyn has four points, Stephanie two, and Suzy has two as well.

Stephanie Taglianetti:

Oof. Don't like that.

Suzy Davidkhanian:

That's so-

Marcus Johnson:

Evelyn out in front. Evelyn, before we move on to the second round, any kind of initial thoughts? There's kind of been an avalanche of information or articles being written about the trial. Any kind of initial reactions at this point?

Evelyn Mitchell-Wolf:

Yeah. I mean so far, we've just been hearing about the DOJ setting up their argument, calling witnesses. So it's the DOJ really driving the conversation, but it already doesn't look great for Google. There's a lot of conflicting information coming out where Google says one thing and

does another. And it's really interesting so far and I can't wait to unpack it with you further on our full episode next week.

Marcus Johnson:

Indeed we shall. Yeah, I think we're going to skip another news, because I think it's going to be-

Evelyn Mitchell-Wolf:

There's so much to talk about.

Marcus Johnson:

Too much to talk about. So yeah, we'll skip another news, we'll make it the full episode. I'm sure there'll be plenty more episodes looking at this in the coming weeks, months. All right, let's move to our next round, second round. It's spoiled for multiple choice.

Suzy Davidkhanian:

Yay.

Marcus Johnson:

Suzy, this is ...

Suzy Davidkhanian:

This is the one.

Marcus Johnson:

This is the one.

Suzy Davidkhanian:

I have to pay attention.

Marcus Johnson:

This is the multiple choice round where we dig a little deeper into one of the topics from the first round. This month we'll focus on Google. So one point for correct answer, three questions in this round, answers too. And these numbers are according to ... All of these

numbers are according to our wonderful forecasting team, so numbers come courtesy of those folks. All right. Question one, what share of the US searches are done on Google? What share ... Actually, you know what? This first one did not come from our forecasting team, but what share ... I think this came from SimilarWeb. The other two questions came from our forecasting team, but what share of the US searches are done on Google according to SimilarWeb?

Suzy Davidkhanian:

You're talking about queries, right?

Evelyn Mitchell-Wolf:

Any question. Like any search-

Marcus Johnson:

Searching for anything. Yeah, yeah. All searches.

Evelyn Mitchell-Wolf:

Wait, are you going to give us numbers?

Suzy Davidkhanian:

Isn't it multiple choice?

Evelyn Mitchell-Wolf:

Yeah.

Marcus Johnson:

It is. Sorry, yeah.

Stephanie Taglianetti:

I almost typed a freeform answer.

Suzy Davidkhanian:

I did too.

Marcus Johnson:

You guys have already solved it.

Evelyn Mitchell-Wolf:

See, I was listening.

Marcus Johnson:

Finally. A, 84%. B, 90%. Or C, 94%. 84%, 90%, or 94%. Evelyn says B, 90%. Stephanie says B, 90%. And Suzy says C, 94%. It is B, 90%, which Evelyn had put before I gave the answers.

Evelyn Mitchell-Wolf:

Who's next?

Marcus Johnson:

So a point for Evelyn and a point for Stephanie.

Stephanie Taglianetti:

Who's next? Bing?

Marcus Johnson:

Bing has, yeah, next in theory. Yeah, Bing has about 6%.

Stephanie Taglianetti:

In theory.

Evelyn Mitchell-Wolf:

What about Ask Jeeves?

Marcus Johnson:

12% still. No, I'm kidding. They have nothing. Yahoo has 2% and that's the list, basically. But if you look at worldwide, similar story worldwide, you exclude China because they're banned, you exclude Russia because they pulled out. And searches, google has 91% and then it goes 3% for Bing, 3% for Yahoo. What's interesting though is TD Cowan asked US adults what search engines they've used as of March this year and a similar share, 86%-87% of people said Google Search. But 22% of people said that they had used Yahoo. 16% said they'd used Bing.

9% said DuckDuckGo. 2% said Ask.com. So folks have tried these other platforms it seems. I wonder if that's going to be part of the case, Evelyn, that Google's going to say, "Look, folks have tried these other ones, they're just coming back to us."

Evelyn Mitchell-Wolf:

Definitely going to be part of the case. Definitely. And I have some thoughts on that, but I'll save them for the full episode. Because I can really get on a tangent on this, so I can save that.

Stephanie Taglianetti:

Or people don't know how to update their automatic search engine, on their-

Marcus Johnson:

Or that.

Stephanie Taglianetti:

That's also part of it.

Evelyn Mitchell-Wolf:

So far, yep.

Marcus Johnson:

Default help. All right, let's move to our second question. This one does come up from our wonderful forecasting team. What share of the US digital ad spending pie does Google have? What share of the US digital ad spending pie does Google have? Is it A, 27%? B, 29%? Or C, 32%? 27%, 29%, or 32%?

Suzy Davidkhanian:

Is that all digital advertising?

Marcus Johnson:

Digital, yeah. All US digital ad spending. Evelyn says A, 27%. Stephanie says C, 32%. And Suzy says A, 27%. So everyone got it wrong. It's B.

Evelyn Mitchell-Wolf:

Oh, God.

Suzy Davidkhanian:

I almost put B and then I was like, "Two Bs in a row. What are the chances?"

Stephanie Taglianetti:

That's what I thought. I had the same testing principle, and I shouldn't have done that.

Marcus Johnson:

Yeah, 29%.

Evelyn Mitchell-Wolf:

I knew it was in the 20s. I just ... Oh. Dang.

Marcus Johnson:

So Google's share peaked last year. In two years ... They will add \$8 billion to their ad revenue, reaching \$80 billion over the next two years. But over that time, their share will go down to 25%. Oh, you know what?

Evelyn Mitchell-Wolf:

What?

Marcus Johnson:

It's not you. 27% is correct. It sounded wrong. Who said 27%?

Suzy Davidkhanian:

Me.

Evelyn Mitchell-Wolf:

Me and Suzy.

Marcus Johnson:

Okay. Suzy and Evelyn are correct, it is 27%.

Evelyn Mitchell-Wolf:

I don't like-

Marcus Johnson:

It sounded very wrong when I said it. I was like, "29% doesn't sound right." And it's not right. It is indeed 27%. Because it's going to go from 27% today to 25% in two years' time. So nice job to you two.

Stephanie Taglianetti:

Why has this guy got to be so dang thorough, huh?

Marcus Johnson:

Sorry.

Suzy Davidkhanian:

That's awesome. So now Steph and I are tied and Evelyn is winning by a lot.

Evelyn Mitchell-Wolf:

No!

Marcus Johnson:

No. Oh yeah, yeah, it's true. Yeah, you are in theory tied. Yeah, six points for-

Stephanie Taglianetti:

What do you mean in theory?

Suzy Davidkhanian:

Oh my gosh.

Marcus Johnson:

Stephanie and Suzy-

Suzy Davidkhanian:

We're literally tied.

Marcus Johnson:

So yeah, it is still ... Even though the share's going down, it is still the go-to ad channel. Even by 2025, Google will claim one out of every five total US ad dollars, one in five.

Evelyn Mitchell-Wolf:

The other way of thinking about it though is who's next after the 27?

Marcus Johnson:

It's Meta with-

Evelyn Mitchell-Wolf:

And how much do they have?

Marcus Johnson:

They're going to have 18%, I believe.

Suzy Davidkhanian:

Dude, I was going to say 18% and it would've been really cool for me to say at the same time as you, and then I was like, "No."

Marcus Johnson:

Meta has 19% this year, 19.5%, but it's going to have 18% in two years' time.

Evelyn Mitchell-Wolf:

Oh, so they're both sliding a little bit.

Marcus Johnson:

They are. What's remarkable is that by 2025, Amazon will have just three points' share less than Meta.

Evelyn Mitchell-Wolf:

Wow.

Suzy Davidkhanian:

When we talk about the triopoly.

Marcus Johnson:

Yes, they have really caught up. All right folks, one more question in this round. What share of Americans have an Android device? Android obviously being-

Evelyn Mitchell-Wolf:

I know the answer to this one.

Marcus Johnson:

Google's operating system as according to our forecasting team. What share of Americans have an Android device? Is it A, 36%? B, 42%? Or C, 50%? 36%, 42%, or 50%?

Suzy Davidkhanian:

Actually, I think I ... Can I take my answer back? That you knew it?

Evelyn Mitchell-Wolf:

I mean, I don't know it. I just said it because I have a Android.

Suzy Davidkhanian:

I took mine back.

Evelyn Mitchell-Wolf:

Did you? I'm going to take mine back too.

Marcus Johnson:

Wait, are these in? What are we doing?

Suzy Davidkhanian:

Mine's in. 36%.

Marcus Johnson:

Evelyn says C, 50%.

Suzy Davidkhanian:

No.

Marcus Johnson:

Stephanie says C, 50%. Final answer, she's very confident. This is not Who Wants to Be a Millionaire. And then Suzy says 36%. Actually Suzy, you're getting further away from the right answer because you initially said 42%-

Suzy Davidkhanian:

Yeah.

Marcus Johnson:

And then you put 36%. But the correct answer is 50%. 50%.

Suzy Davidkhanian:

It is not. Is it really?

Marcus Johnson:

It's the right answer.

Suzy Davidkhanian:

One in two people and everybody bugs me about why I have an answer?

Stephanie Taglianetti:

That is one in two.

Marcus Johnson:

Yeah. This is the thing, Suzy.

Suzy Davidkhanian:

How does that even-

Marcus Johnson:

[inaudible 00:22:18] of the Android people.

Suzy Davidkhanian:

Make sense?

Marcus Johnson:

Yeah. It's just those Apple folks pushing propaganda. That's what it is. The other 50% unsurprisingly is iPhone. So in the US it's literally 50-50.

Evelyn Mitchell-Wolf:

I thought actually it was not. I thought around the world it was like 75-25 for Android.

Marcus Johnson:

Worldwide is.

Evelyn Mitchell-Wolf:

Yeah.

Marcus Johnson:

Yeah, worldwide it is.

Stephanie Taglianetti:

Worldwide, Android is definitely ahead of-

Evelyn Mitchell-Wolf:

Yeah. I just thought in the US, it was that much lower Android. I didn't know it was one-to-one because literally everybody I know has an Apple. Except for me.

Marcus Johnson:

Yeah, same. But somehow, somehow it's 50-50, according to our forecasting folks. And so Evelyn and Stephanie do get a point, Suzy does not. Let's count the scores at the end of round two. And Evelyn just stormed out in front, she's got seven points. Stephanie with four. Suzy-

Stephanie Taglianetti:

Four?

Marcus Johnson:

Suzy is ... Suzy's got less than that.

Suzy Davidkhanian:

Yeah, I'm at three. If you're at four, then I'm at three.

Marcus Johnson:

You are at three, yeah. Just the three.

Stephanie Taglianetti:

Gosh, four?

Suzy Davidkhanian:

Wait, did Evelyn get a perfect score? How many questions were in your first one?

Marcus Johnson:

One. Yeah, she hasn't got one wrong.

Suzy Davidkhanian:

Wow.

Marcus Johnson:

Yeah.

Suzy Davidkhanian:

Good job.

Marcus Johnson:

[inaudible 00:23:21] question.

Evelyn Mitchell-Wolf:

I was hoping nobody would say that because I ...

Stephanie Taglianetti:

Didn't want to jinx it?

Marcus Johnson:

Uh oh. Of course we move to the final round. Closest wins. And this is the round where the closest guess wins the most points. Also points to give away here, so in theory Stephanie could come back. Suzy, not so much.

Suzy Davidkhanian:

Not so much.

Marcus Johnson:

Three questions. Closest guess for each-

Suzy Davidkhanian:

We all know that joke.

Marcus Johnson:

Gets three points. Second closest gets two. Furthest gets one. Let's play.

Stephanie Taglianetti:

Drama.

Evelyn Mitchell-Wolf:

Pressure is on.

Marcus Johnson:

First question of the final round. And these questions are linked to the questions from the first round. Loosely related. So we're talking about long-form and short-form video, is what we were talking about in the first round. And we're talking about video ad spending by platform in this round. So we estimate that this year 30% of US video ad dollars will go to Meta, 30%. And around 7% will go to TikTok. But what share of total US video ad dollars, total US video ad dollars, will go to YouTube? What share of the pie will YouTube's video ad revenues account for?

Suzy Davidkhanian:

Oh, we need a timer on this.

Marcus Johnson:

Suzy.

Suzy Davidkhanian:

No, I'm sorry.

Marcus Johnson:

It wouldn't be a real quiz if you didn't get really intense at a very random moment.

Suzy Davidkhanian:

Oh, see? That's not cool. No.

Marcus Johnson:

Stephanie, what's happening?

Stephanie Taglianetti:

I keep fidgeting with my second digit.

Marcus Johnson:

That's okay, we've got it. So Evelyn says 24%, Stephanie says 35%, and Suzy says 17%. The correct answer is 8%.

Suzy Davidkhanian:

Oh my goodness.

Marcus Johnson:

8%, surprisingly.

Evelyn Mitchell-Wolf:

Guys, I'm going to win. Totally.

Marcus Johnson:

So Suzy gets-

Evelyn Mitchell-Wolf:

By virtue of being the less wrong.

Marcus Johnson:

Evelyn gets two and Stephanie gets one.

Stephanie Taglianetti:

No.

Suzy Davidkhanian:

Wow.

Evelyn Mitchell-Wolf:

7%. And I think I knew that and then was like, "No, that can't be right." Wow.

Marcus Johnson:

It is indeed.

Stephanie Taglianetti:

I was so wrong.

Marcus Johnson:

8%.

Evelyn Mitchell-Wolf:

Well, this is a good job in anchoring us, right? Because that was a tricky-

Stephanie Taglianetti:

Yeah, we're keeping it like this.

Marcus Johnson:

Okay, so Evelyn with nine, Suzy with-

Suzy Davidkhanian:

Six.

Marcus Johnson:

Six? Wow. And Stephanie with five. Let's move to our second question here. Generative AI is what we were talking about in the first round, and now we're talking about experimentation with generative AI. So what share of companies are currently experimenting with generative AI? Experimenting being the keyword according to Deloitte's most recent CFO Signal Survey for Q3. And so I'll give you a hint from that survey, from that same question, 24% of people said that they're reading and talking about generative AI. 17% said it's too soon to make a decision on its use in their company. And 15% said they're actively incorporating it into their business strategy. So 24% said they're reading and talking about it, 17% said that it's too soon, and 15% said they're incorporating it into their business strategy. What share of folks are currently experimenting with gen AI?

Okay, answers are in. Evelyn says 64%. Stephanie says 60%. And Suzy says 12%. The correct answer though is 42%. 42%. So Stephanie's closest with 60%, Evelyn second with 64%, and Suzy, well-

Suzy Davidkhanian:

Wait, what was the number?

Marcus Johnson:

42%.

Suzy Davidkhanian:

Wait, so does it add up to 100 between all four options?

Marcus Johnson:

No.

Stephanie Taglianetti:

No, because I think it's like of the folks experimenting, they were saying too early to decide what we're deploying. Yeah, that was-

Suzy Davidkhanian:

What number did Evelyn give you?

Evelyn Mitchell-Wolf:

64%.

Stephanie Taglianetti:

So we're a tie?

Suzy Davidkhanian:

No, I'm 30 different. Oh no, she's 20. Sorry.

Stephanie Taglianetti:

I said 60%, so I was closest.

Suzy Davidkhanian:

Yeah.

Marcus Johnson:

Yeah. That's okay. I've got the math. I've got the maths handled.

Suzy Davidkhanian:

Just checking.

Marcus Johnson:

Yeah, thanks.

Evelyn Mitchell-Wolf:

Thanks for checking, Suzy.

Suzy Davidkhanian:

No problem. I wouldn't make my university proud if I didn't at least check.

Marcus Johnson:

Stephanie was ahead of Suzy going into the final around. Suzy pulls ahead and now Stephanie's pulled back ahead. Evelyn is comfortably going to win this game, 11 points to her. But it's all to play for silver between Stephanie and Suzy. The final question, and we're talking

about retail media networks, which again is linked back to the question from the first round, and we're talking about Instacart. What share of the retail media pie does Instacart have in the US? What share of retail media pie does Instacart have in the US, according to our forecasting crew? Evelyn, because she's won, probably couldn't care less. Just threw ... You answered very quick, but she's still playing, which is very good of you.

Evelyn Mitchell-Wolf:

Thank you. Yeah, I don't really know. So I just kind of ... I took an educated, I think, guess is what I would call it.

Marcus Johnson:

Evelyn says-

Stephanie Taglianetti:

I took a simple guess.

Marcus Johnson:

6%. Stephanie says 35%. And Suzy says 14%. The correct answer is 2.5%. 2.5%. So Evelyn actually gets the four-to-three points.

Suzy Davidkhanian:

Evelyn for the win.

Marcus Johnson:

Suzy gets two and Stephanie gets one.

Stephanie Taglianetti:

Sad.

Marcus Johnson:

And so yeah, 2.5% is the share that they have. Is good enough for an extremely distant third place. So Amazon has 75%, Walmart has 7%, and Instacart in third, if you want to call it that, has 2.5%. All right folks. Let me see. Do we need ... Oh, we do need it. Wow. Okay, so-

Stephanie Taglianetti:

Wait, what?

Suzy Davidkhanian:

We need a tiebreaker.

Marcus Johnson:

We do need a tiebreaker. Evelyn is your winner-

Suzy Davidkhanian:

I'm okay being tied for second.

Marcus Johnson:

With 14 points. So she's going to get the gold and three super-duper points regardless. So V, we can add her to the leaderboard total. So advertising and media, they needed some help. Yes?

Evelyn Mitchell-Wolf:

I know they did and I said I was going to redeem myself, so I feel really ... I feel good about this.

Marcus Johnson:

You've done it. Victoria, go ahead.

Evelyn Mitchell-Wolf:

Thanks.

Victoria:

The tie-break is for round three or for your final total. Because final total we have first, second, and third. But round three, you're looking to tie-break round three because based on everybody's scores, we do have a clear-

Marcus Johnson:

Oh, we do have-

Victoria:

First, second, and third.

Marcus Johnson:

Oh that is very true.

Stephanie Taglianetti:

I can't take this back and forth.

Victoria:

We could do a tie-break question if you guys are feeling it.

Stephanie Taglianetti:

No, no.

Suzy Davidkhanian:

Let's just do one. Let's just- wait,

Marcus Johnson:

Wait, wait, wait, wait, wait, wait, wait, wait. One second, one second, one second. Final total.

Oh, that is true. Oh, we don't need it.

Stephanie Taglianetti:

I've been jerked around too much. Way too much.

Marcus Johnson:

Oh, that's such a shame. I haven't used a tie ... I don't think I've used ... I keep getting-

Suzy Davidkhanian:

So who won second?

Marcus Johnson:

Tie-break questions, but we don't need the entirely too random tie-break question because Victoria's right. Second place goes to ... Stephanie. Second place.

Suzy Davidkhanian:

Boo, but congratulations.

Marcus Johnson:

So Evelyn had an insane 25 points. Stephanie had 15. And Suzy had 14.

Stephanie Taglianetti:

Oh yeah.

Marcus Johnson:

Evelyn, I believe that is not even remotely close. That is the high score by about 10 points.

Evelyn Mitchell-Wolf:

What? Oh my gosh.

Marcus Johnson:

Yes, really. I didn't know you could get that many points. You got all the points you can get, but yeah. 27 I think is the highest you can get, and you got 25.

Evelyn Mitchell-Wolf:

Wow.

Marcus Johnson:

So congratulations to you.

Evelyn Mitchell-Wolf:

That's special.

Stephanie Taglianetti:

Yeah, congratulations Evelyn.

Suzy Davidkhanian:

No, come on. We're excited. Good job.

Marcus Johnson:

Okay, so let's take a look at the leaderboard. V, have you added them yet?

Victoria:

I did.

Marcus Johnson:

You did?

Victoria:

Oh no, I just did one. Sorry. I did the first one. I'm getting there.

Marcus Johnson:

Okay. No, you're good.

Victoria:

Sorry.

Stephanie Taglianetti:

This is a mess.

Victoria:

Wait. Okay. Evelyn is advertising.

Marcus Johnson:

Yep.

Victoria:

Social media connectivity is Stephanie. That would be silver. So that becomes this. And retail-

Marcus Johnson:

We're changing this. Stuart's not allowed. Okay-

Victoria:

We're good. We're set.

Marcus Johnson:

It's updated?

Victoria:

It's updated.

Marcus Johnson:

All right folks, let's take a look at the leaderboard. So Evelyn brought home three super-duper points for advertising and media. Stephanie brought home two for social and tech. And Suzy brought home just the one for retail. So after the sixth game, we have advertising and media are tied with retail for second place. Joint second, joint third, joint last, wherever you want to call it, with 11 points. And social and tech are still out in front with 14 points. But nice job for Evelyn, she managed to pull even with retail and got the highest score we've ever had. And I'm almost certain we'll never going to be ... Congratulations to all of you guys, but particularly Evelyn who won this week's game. Thank you guys so much for hanging out today. Thank you to Evelyn.

Evelyn Mitchell-Wolf:

Oh, thank you. This has been fun.

Marcus Johnson:

Yes, indeed. Thank you to Stephanie.

Stephanie Taglianetti:

Thank you.

Marcus Johnson:

And thank you to Suzy.

Suzy Davidkhanian:

It's my pleasure. Thanks for having me.

Marcus Johnson:

And thank you to Victoria who does literally everything for this podcast. James, who does some things. And Stuart, who doesn't do much. Thanks to everyone for listening in. We'll be back with the October quiz at the end of October. We hope to see you tomorrow though for the Behind the Numbers Weekly Listen, an eMarketer podcast made possible by Awin.