

# The Weekly Listen: Time for Google to spin off YouTube, sentiment around targeted ads, and a TikTok car app

Audio



On today's episode, we discuss whether it's time for Google to spin off YouTube, how people feel about targeted ads, what consumers think about using AR to shop, what an in-car TikTok app might look like, the US Supreme Court examining Section 230, paid health leave in the US versus the world, and more. Tune in to the discussion with our analysts Blake Droesch, Evelyn Mitchell, and Paul Verna.



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## Episode Transcription:

Marcus Johnson:

Hello, everyone, and thanks for hanging out with us for the Behind the Numbers' Weekly Listen: an eMarketer Podcast made possible by Meltwater. This is the Friday show that gets emailed by Paul Daley reminding it that Argentina won the World Cup. I'm your non-Argentinian host, Marc ... That actually happens, literally every day. I'm your non-Argentinian host, Marcus Johnson. In today's show, is it time for Google to spin off YouTube?

Paul Verna:

I think what's going on here is that YouTube has underperformed for the past few quarters, but to me, that's not a reason to spin it off. Because the underlying reasons for that underperformance have more to do with adverse economic conditions and softening ad budgets.

Marcus Johnson:

How many consumers actually dislike targeted ads?

Blake Droesch:

In theory, yes, nobody likes advertising. But there is certainly forms of targeted advertising that we know to be very effective.

Marcus Johnson:

How many folks want augmented reality to help them with online shopping?

Evelyn Mitchell:

If a brand creates an AR tool, it should be reducing barriers to use it. And I think part of that is making sure consumers are aware that the tool exists, and then making it easy to use.

Marcus Johnson:

What might a TikTok car app look like? The US Supreme Court examines Section 230. And what does paid health leave look like in America?

Join me for this episode. We have three people. Let's meet them. We'll start with someone with actual Argentinian connections and roots. He's our principal analyst who heads up our digital advertising and media practice based out of New York. It's Paul Verna.

Paul Verna:

Go, Argentina.

Marcus Johnson:

Dastardly Paul Verna. Congratulations to them. We're also joined by one of the very folks on that team, digital advertising and media, one of our analysts based out of Virginia. It's Evelyn Mitchell.

Evelyn Mitchell:

Actually, some news to share.

Paul Verna:

Yep.

Evelyn Mitchell:

I am now a senior analyst.

Marcus Johnson:

Oh, slow down.

Blake Droesch:

Oh, congratulations.

Evelyn Mitchell:

Thank you.

Marcus Johnson:

Hello. I'll say your name again. We're also joined by one of our senior analysts on that very team, digital advertising and media, based out of Virginia. It's Evelyn Mitchell.

Evelyn Mitchell:

Hello. Hello.

Marcus Johnson:

Hello, there. And finally, we have one of our analysts on ... Nope. Right, Blake?

Paul Verna:

Senior.

Blake Droesch:

I didn't get demoted.

Marcus Johnson:

Senior analyst?

Blake Droesch:

Evelyn got promoted. It doesn't mean I get demoted.

Paul Verna:

It's not binary.

Marcus Johnson:

I just thought maybe people had got on. It was about time.

Blake Droesch:

No, I know they've been reassessing everybody's titles and I think maybe it was just time to bump me down a notch.

Marcus Johnson:

Let me try that one again as well. We're also joined by one of our senior analysts on the retail and E-commerce team based out of New York. It's Blake Droesch.

Blake Droesch:

Hey, Marcus. Good to be here.

Marcus Johnson:

Hey, buddy. What do we have in store for you today? The first segment, the Story of the Week, we're going to look at whether Google should spin off YouTube. We then move to the Game of the Week, where our contestants will go head-to-head-to-head, give us the best takeaway they can from each of the four news stories we have for you. And finally, Dinner Party Data. That's where we end. We talk about some random trivia, things we just recently learned. But we start with the Story of the Week.

"Is it time for Google to spin off YouTube?" The Economist questions. "It could be worth more than Netflix," they follow up. But folks are having a tough time appreciating its value. What, with so much of the media coverage focused on Google and YouTube's parent company, Alphabet, and its defense against Microsoft's ChatGPT-inspired search and legal cases that have reached the US Supreme Court. More on that later.

With all that distraction, maybe people aren't paying enough attention to YouTube and its value, as long-term YouTube CEO Susan Wojcicki steps down. Reflection on her nine-year tenure notes that YouTube has become an all-in-one, everything place. Whether you want to put your kids in front of it for the entire year, whether you want to use it for DIY things, whether you want to get yoga tips from it, it's a platform that people can go to for everything.

It's a platform also that reaches 2.6 billion monthly active users. It's got a pretty decent revenue sharing model. And YouTube Shorts, which is a product they created in response to TikTok, averages 50 billion views a day. It's not in terrible shape at all, despite some slowdown in growth on the ad side for YouTube in the last couple of quarters.

Evelyn, I'll start with you because you really focus on Google for us. The Economist is writing that Tim Mulligan of research firm MIDiA, thinks Alphabet may, in fact, be hindering YouTube more than helping it. And so questions. Is it time for a spinoff? Is it?

Evelyn Mitchell:

I think it's a very interesting proposition and one of the arguments in favor that stuck out to me was in regards to regulation. Google has an enormous regulatory target on its back. Antitrust enforcers are all over it from several different angles. And recently, in a compromise with the European Commission, Google agreed to make YouTube ad inventory available through other ad intermediaries. And since 2015, that inventory has been locked behind Display & Video 360, which is Google's demand side platform.

To open that inventory up to other ad intermediaries, being worthy of a concession that the European Commission would accept, clearly, YouTube is a part of this antitrust puzzle. And spinning it off would be an action that speaks louder than words. But I don't know if it would completely mollify the DOJ over here in the US. If Google is facing a potential divestiture of its sell side ad tech no matter what, I don't know that it would want to give up YouTube as a source of revenue.

Marcus Johnson:

Yeah. Regulators, it's definitely one reason. Would've relieved some of the pressure that it's facing. There's the Supreme Court case looking at whether YouTube violated antiterror laws by using algorithms that recommend extremist videos. More on that in the Game of the Week.

The Economist was suggesting a voluntary breakup before the government forces it to. Could be a very generous goodwill gesture, and especially because of its digital ad dominance as well, being another issue for regulators. Paul, what do you think? Time for Google to put YouTube to one side?

Paul Verna:

Well, I'm going to pick up on Evelyn's point about regulation. And I actually don't think that breaking up the company is something that is going to satisfy regulators. I think the issues that they're looking at are going to be present whether or not YouTube is part of the larger company. I also don't think there's a good business case for Alphabet to sell it. I don't think it benefits either party. YouTube is pivotal to Google's business. Their ad products are intertwined. YouTube is the flagship of all of Google's activities in video and music and gaming. Google's thrust to evolve from search to video and connected TV, all of that flows through YouTube. Even the live TV product, though it hasn't been a money maker yet for Google, it's inextricable with the YouTube brand.

I think what's going on here is that YouTube has underperformed for the past few quarters, but to me, that's not a reason to spin it off. Because the underlying reasons for that underperformance have more to do with adverse economic conditions and softening ad budgets, especially closer to the top of the funnel. And also, competition from other video services and tech companies and social media companies. But selling YouTube is just not going to put either company in a better position to compete.

And then with content moderation, the article makes the argument that YouTube might do a better job of it on its own. I disagree with that as well. I think content moderation is largely a problem of scale and resources, so having Google as the parent company can only help with content moderation. I just don't think that YouTube, with the scale that they already have on their own, or the size of the audience to have to shoulder that burden, which is already hard enough where the company as fully resourced as Google, I think that would only make the problem worse. I just don't really see the benefit for either party. I just don't see this happening at all.

Marcus Johnson:

Yeah. You mentioned the two negative quarters of growth pool, and it would seem a bit reactionary for them to sell it off because they still made \$29 billion in ad revenue for YouTube last year. The previous year, 2021, they made the same amount of money. Even though they were negative for two consecutive quarters at the end of last year, they still made the same amount of money. So they're not actually losing or making less money than they were the year before.

But you did say it's maybe not worth them selling the company. They'd get a fair amount for it. Former Behind the Numbers guest actually, Laura Martin of Investment Bank, Needham, thinks YouTube could be worth at least \$300 billion. "That's good enough," she notes, "to be double the market cap valuation of Netflix and nearly that of Disney." Nearly double Disney as well, so it's worth a lot of money.

Evelyn Mitchell:

I was going to piggyback on what Paul was saying about particularly YouTube's positioning, if it were to be spun off. Having access to Google's resources, not just for content moderation, but in terms of consumer data, in this new world, this privacy-centric era that we find ourselves in, data is a huge piece of that puzzle. And to remove YouTube from the rest of



Google's treasure trove of consumer data would put it at a disadvantage, certainly relative to what it's used to for targeting, for measurement. This is a big deal and I can't imagine that YouTube would willingly walk away from that kind of resource. They have resources in terms of time and money for content moderation and irreplaceable amounts of consumer data.

Marcus Johnson:

Blake, quickly, can you see a world in which YouTube gets spun off by Google?

Blake Drosch:

No. I agree that it wouldn't be a very viable business decision for Alphabet to do so. Not necessarily because I agree with some of the threat to the long-term future of Google Search that is being thrown around in the media right now, the rise of chat AI and its competitors like Microsoft, but because of the fact that regardless of whether or not this is a real threat to Google Search, I think that YouTube is really going to largely become a rock of profitability for Alphabet in the way that search is.

And they might need it just as the tides change with search in the longterm. Particularly, with more money flowing to retail media networks as we talk about a lot these days, if that does or there are other factors that do weaken Google's Search product, having YouTube as that solid foundation of ad revenue is going to be even more important in the longterm.

Marcus Johnson:

Yeah. Well, that's where we'll leave it. More on this on Thursday's episode, next Thursday. Me and Evelyn will talk more about YouTube and Ms. Wojcicki, her leaving, the CEO of YouTube, her leaving the company, where she's left the company currently and where we see it going in the future. That's all we've got time for though, for the Story of the Week. Time now for the Game of the Week.

Today's game, what's the point? Where I read out four stories and have contestants Evelyn, Blake and Paul, tell us what they think is the main takeaway of the story. Okay answers get one point, good answers get two, and answers that give you the same feeling as when you used to find a little surprise cash in the old pocket, answers that leave you with that feeling will get you three points.

Each person gets 20 seconds to answer before they hear this. You go over, technical foul. Minus two points. Two ticks gets you ejected. Whoever has the most points wins, gets the last

word. Let's do it.

Paul Verna:

I find myself now sometimes seeing that my Venmo has a higher balance than I expected, so I think that's the equivalent. Because I certainly am not finding cash in any pockets. Not that I ever did, but it's not going to happen now.

Marcus Johnson:

That is the modern-day equivalent. It does feel good. It's funny how when money shows up in your account. You're like, "Okay. It's probably supposed to be there." When it gets taken away, up in arms. All of a sudden, you've got 100 bucks in your, I don't know, Wells Fargo account and you're like, "I don't care how it got there. That's mine now." Anyway, let's start with Paul. Paul, round one. Let's go.

"37% of customers dislike targeted ads because they could potentially end up infringing on their privacy reports sort list. The research also found 90%, pretty much all, 35 to 44-year-olds, 35 to 44 said they'd never bought something after seeing it in a targeted ad. 28% of younger college-aged kids said they're more likely to start hating the brand," it's intense, "after seeing a targeted ad."

But Paul, 37% of customers disliking targeted ads, what's the point?

Paul Verna:

Well, most people would prefer a relevant ad to an irrelevant one, but to me, that's almost a lesser of evils choice. Because the reality is that consumers generally dislike all ads and would avoid them if they could. They don't appreciate being bombarded with ads for things they already bought or things they browse with no intention of buying.

They absolutely despise repetitive ads on CTV streams, which is a function of targeting gone wrong. And most of all, they're completely creeped out when they're served ads for something they talked about and didn't necessarily post about, which I can relate to from direct experience. This doesn't surprise me. I think the numbers, if you ask me, they should be even higher.

Marcus Johnson:

Evelyn?

Evelyn Mitchell:

This is all about expectations and perceptions. This survey is about "targeted ads". Given the prevalence of programmatic advertising, I'm wondering how respondents could possibly distinguish between targeted and untargeted ads? And asking questions about targeted ads primes respondents to think about ads that are especially conspicuous. So retargeting and crossed-context behavioral targeting where it's obvious someone got their hands on some data that the consumer didn't expect them to have. So perceptions and expectations. If advertisers used first and third-party consumer data tactfully so as to not go against the average consumer's expectations, consumers might not even perceive ads being targeted at all.

Marcus Johnson:

Blake?

Blake Droesch:

Yeah. I think this is the type of survey that you have to take with a grain of salt, because people reacting to specific questions like this will have a very different sentiment to targeted ads and questions around them, compared to when they actually encounter them in the wild. I agree with Evelyn. It makes the average consumer ... It's basically impossible for them to give you direct feedback on how advertising impacts them.

I remember seeing a survey a few years ago that found that a super high percentage of consumers think that advertising has no impact on them whatsoever. And we know that that's just not true. I think this is a little bit more of the same vein that in theory, yes, nobody likes advertising, but there is certainly forms of targeted advertising that we know to be very effective.

Marcus Johnson:

Two things that jumped out to me from the Digital Information World article that we were reading this in, one was, "The ads that Gen Z folks see on TikTok can make them 73% more likely to buy a product. It's all just a matter of targeting the right people in the right place at the right time," the article is noting. And that's a great example of that. And then secondly, "B2B folks, three times more likely than B2C people to buy from a targeted ad that was from a sort list." B2B folks, three times more likely than B2C folks to buy from a targeted ad.

We move to round two. We start with Evelyn. "Consumers turn to augmented reality to help with online shopping," writes Insider Intelligence's retail analyst, Rachel Wolff. "Three in four folks told The Harris Poll that augmented reality would help with online buying. The survey also found that most, 82%, of 18 to 44-year-olds, 18 to 44 were willing to use AR as were two thirds of over 45." So pretty much all 82% of the 18 to 44, and two thirds of over the older age group, the over 45s.

But Evelyn, consumers saying that they want to turn to augmented reality to help them with online shopping, what's the point?

Evelyn Mitchell:

I agree with Rachel that, given the inflation, retailers should be offering every feature they can to reduce as many barriers to purchase as possible. And I think the same goes for AR experiences. If a brand creates an AR tool, it should be reducing barriers to use it. And I think part of that is making sure consumers are aware that the tool exists and then making it easy to use.

So turning the tool into a web app, having a try-it-now button on every product page, QR codes and catalogs. The more touchpoints there are, the higher the likelihood that the people who say AR would help with purchasing decisions would actually use it.

Marcus Johnson:

Blake?

Blake Droesch:

Yeah. I think that it's hard to talk about AR in general when it comes to shopping because there are certain categories where it actually has become really effective. And then there are other areas, like apparel and accessories, where there's still, in many respects, has a long way to go of having a really practical use.

But just a highlight, we just published our US eCommerce Byproduct Category forecast, and categories like furniture and home furnishings, within the next five years, more than half of those sales are going to come from online. So it's really important for retailers who are in those core categories where AR can actually be really useful to figure it out and make sure that their AR product is competitive with others in those verticals who offer the same thing.

Marcus Johnson:

Paul?

Paul Verna:

Yeah. I agree that the way AR plays out currently, there's a big gap between what happens, say, in apparel, what happens in home furnishings or automobile shopping where you really can visualize something with the help of AR in a way that helps you make the purchase. Where I think it's going to really impact or could really impact is in returns.

Reducing returns, which have always been an issue, but have become even more so as retailers are under tighter margins and grappling with a lot of the economic conditions that everybody else is grappling with. If they are well-implemented, can help lower the rate of returns, then it can be a win-win for everyone.

Marcus Johnson:

Yeah. We expect, Insider Intelligence, our forecasting crew, expect 40, 40 million Americans to be retail augmented reality, retail AR users this year. That'll be five million more than last. The halfway mark. Evelyn out in front with six points, Blake with five, Paul with four. As we move into round three, we start with Blake.

"TikTok featured as a new app in the 2024 Mercedes-Benz E-class," writes Hope King of Axios. "She explains that the new car will let drivers use TikTok, Zoom, Angry Birds and other apps directly through the car's massive dashboard touchscreen without needing Apple CarPlay or Android Auto. Ms. King notes that carmakers have been hyperfocused on transforming the in-cabin experience with internet connectivity and apps."

But Blake, TikTok app in a car, what's the point?

Blake Droesch:

There are just so many directions that you can take this one. I don't really want to touch any of them. From a very, very, just a core point of view, from a very practical point of view, I think that the demographic who is able to afford a high-end Mercedes like this and one that has an interest in using TikTok while driving the car, I think that's a very, very small section of a Venn diagram. To all the other safety reasons and other stuff aside, I think that at its core, it's very odd to me.

Marcus Johnson:

Argentina? I mean, Paul?

Paul Verna:

Well, on the one hand, having gaming and video experiences in a car is a little freaky to me. And when I hear in-cabin experience, I think of you sitting on a plane, where you're not actually flying the plane, somebody else is. But if you're driving the car, then having all these apps seems very detrimental and potentially dangerous. But more realistically, I see a lot of people park their cars at their kids' soccer practice and sit in their cars, unfortunately running their engines, but doing all sorts of things on their screens.

And I also think to something like, I just read an article about Snoop Dogg, making part of the catalog or all of the catalog of Snoop Dogg records available exclusively on TikTok. So I think, okay, that's more of an audio experience. I guess, there's some aspects of it that seem interesting, but I'm still trying to wrap my mind around it.

Marcus Johnson:

Evelyn?

Blake Droesch:

It's a good thing I still have Doggystyle on CD.

Marcus Johnson:

Thank goodness.

Evelyn Mitchell:

Oh, for me, screens and cars made sense because they essentially made it easier to use your phone while driving, but only certain features. Navigation, answering phone calls, streaming music to car speakers, things that you can do safely while driving. And, of course, I was relieved to read some of the app integrations are only available when the car is stationary, or to passengers. But that begs the question, why would anyone need this, to Blake's point?

Passengers can use their phones or tablets at any time, so can drivers when they're not actively driving. And I'm sure there's an audience for this, like Blake mentioned, but just, it's

not really a value add. So I can't imagine many people will go out of their way to upgrade their car with this feature, no matter how popular TikTok is.

Marcus Johnson:

I was going to ask you guys, TikTok app in a car, too safe or extra, extra safe? Neither. Round four. Double points, round four, of course. And we start with Paul. Oh sorry, let me give you some scores heading into the final round. Evelyn with nine points, Blake and Paul tied up on seven. So all to play for. Round four.

The US Supreme Court examines Liability Law Section 230. As Sara Morrison of Recode explains, "Section 230 of the Communications Decency Act is the legal backbone of the internet, a law created almost 30 years ago to protect internet platforms from liability for many of the things third parties say or do on them. Think photos on Instagram or reviews on Yelp. You could sue the person posting the thing, but not the company hosting it."

"The Supreme Court is considering a few cases with Section 230 at the center. Nina Totenberg of NPR explains that families of terrorism victims are suing Google, Twitter, Facebook, and other social media companies under the Federal Anti-Terrorism Act, which allows civil damage claims for aiding and abetting terrorism. The families allege the companies did more than simply provide platforms for communication."

"Rather, they contend, that by recommending ISIS videos to those who might be interested, they were seeking to get more viewers and increase their ad revenue. The Supreme Court could leave as is, reshape, redefine, or repeal Section 230." But Paul, the US Supreme Court examining Liability Law Section 230, what's the point?

Paul Verna:

Well, based on this week's oral arguments, it's hard to predict how the Supreme Court will rule when it finally hears these cases this summer. But I can predict that like everything else the court does, it will be politicized. That means that in the case of digital media or digital tech and social media, the conservative view is that they stifle right wing views, and the liberal view is that they turn a blind eye to misinformation and hate speech.

Now, in both of those cases, the natural remedy is to punish the tech and media companies by narrowing the scope of Section 230. So I'm betting that something along those lines will happen, if nothing else for political reasons.

Marcus Johnson:

Evelyn?

Evelyn Mitchell:

One of the most interesting revelations from the oral arguments that I've read about is that the original authors of Section 230 acknowledged in a briefing that user-specific content recommendations would be protected under Section 230 as a "more contemporary method of content presentation."

I don't personally ascribe to originalism when it comes to interpreting the Constitution or any other legislation, but it does put a damper on that particular element of the plaintiff's argument when it comes to whether targeted recommendations or algorithms in general constitute higher editorial judgment, as opposed to just having content available on a platform.

Marcus Johnson:

Blake?

Blake Droesch:

Okay. Wow, I did not know that Evelyn dabbled in constitutional law as a hobby. I don't know how.

Marcus Johnson:

Yeah. Good luck.

Blake Droesch:

Originalism. Okay. I haven't heard that in a while. I think I would just echo, I think there's a very interesting philosophical argument here, coming down to the responsibility of a private company versus basically the way that media can or cannot influence an individual to act a certain way, and then who can be held responsible. I understand that there's legitimate propaganda on social networks.

But the other part of me thinks that this has been an age-old debate about whether certain forms of media can influence people to commit violence or other hateful acts. And should that media be held responsible? But just to package it all up, to what Paul said, it will just become



political in nature. So no matter what the decision, I think it will be skewed from that core philosophical debate.

Marcus Johnson:

Very nice, folks. Very nice indeed. Final look at the scores. Drum roll. Let's end the Game of the Week. You probably figured that because there's a drum roll. All right. Right. Here we go. It's Evelyn, this week's winner of the Game of the Week, not just because she teaches law at Harvard on the side. 15 points to Evelyn, Blake and Paul tied with 11 apiece. Heck of a game, folks. Very high-scoring indeed. Congratulations to Evelyn. And also, championship belt, and also the last word.

Evelyn Mitchell:

Oh, nuts.

Marcus Johnson:

What was that?

Evelyn Mitchell:

I never prepare. I said, "Oh, nuts. I prepare for this."

Marcus Johnson:

We've got to cut this part of the show.

Evelyn Mitchell:

I know. Well,-

Marcus Johnson:

No one is ready. "Thanks, Marcus. I'd like to thank Marcus."

Evelyn Mitchell:

I would like to thank Marcus-

Marcus Johnson:

"For putting the game together every week, which is a lot of work."

Evelyn Mitchell:

As always.

Marcus Johnson:

Whatever you want to say. Whatever you want to tell people, it's-

Evelyn Mitchell:

Oh, I have it. Okay. We can cut out all of that before stuff.

Marcus Johnson:

Well, I just said we're going to have to cut.

Evelyn Mitchell:

No, I mean just all of the floundering of me being like, "I don't know what to say."

Marcus Johnson:

Oh, I thought you meant me. All right.

Evelyn Mitchell:

For my last word, Marcus, I would be honored if you would say the word y'all for me again.

Marcus Johnson:

It would be my pleasure, y'all. Not bad.

Evelyn Mitchell:

Thank you so much.

Marcus Johnson:

You're very welcome. Anytime. Any American words you guys want saying?

Marcus.johnson\_Instagram. That's not my email address. Just, behindthenumbers\_podcast. You can DM us. That's the thing you can do. We weren't expecting it to happen and people started doing it when we set up the page. And it's been pleasant.

So send any thoughts you have in, unless you think Susie has a legitimate garden on her windowsill. And then keep that to yourself. Okay? We have no time for that. It's two plants, people. It's two plants. All right. Congratulations to Evelyn. You win the Game of the Week. What's now? Dinner Party Data.

This is the part of the show where we tell you about the most interesting thing that we've learned this week. We start with Evelyn, y'all. Oh, I went too country.

Blake Droesch:

That did not sound right.

Marcus Johnson:

Yeah, that wasn't good. I should have quit while I was ahead. Go on, Evelyn.

Evelyn Mitchell:

Last time I was on Behind the Numbers Daily, Marcus' Fact of the Day was about the artist with the most Grammys. And he accidentally started by asking who'd won the most Oscars?

Marcus Johnson:

Yes, I did.

Evelyn Mitchell:

And in the confusion, also asked which award was associated with theater? And those are the Tonys. So if you haven't guessed [inaudible 00:29:50].

Marcus Johnson:

This was a brilliant episode, in case you're wondering.

Evelyn Mitchell:

It was. Highly recommend. But I wanted to talk about EGOT winners.

Marcus Johnson:

Oh. Oh, yes.

Evelyn Mitchell:

That is artists, actors, musicians, composers, directors and producers that have won at least one Emmy, Grammy, Oscar and Tony. It's an incredibly difficult feat. And as of 2023, only 18 people have managed to EGOT. The first person to achieve this distinction was Richard Rodgers, who completed his I Ego in 1962. The latest person to EGOT was Viola Davis, who joined the list this year.

And as you can imagine, it takes a while to accumulate all of these awards. The fastest any one person has EGOTed was 10 years. That was the songwriter Robert Lopez, who worked on Frozen and Book of Mormon. Lopez is also the youngest person to EGOT at 39 years old. John Legend was the second-youngest person to EGOT at 39 years old and eight months, and the second fastest to EGOT. It took him 12 years.

Marcus Johnson:

Wow. I'm still waiting for a Poddy.

Evelyn Mitchell:

I don't know if that is a-

Marcus Johnson:

Is that a thing?

Evelyn Mitchell:

... good name for a podcast award.

Marcus Johnson:

That should be a thing. I have no idea [inaudible 00:30:59].

Paul Verna:

Well, whatever the award is called, it's going to start with a P. So we should have a PEGOT category.

Evelyn Mitchell:

PEGOT?

Paul Verna:

And Marcus, you can start by winning-

Marcus Johnson:

I was so close.

Paul Verna:

... your P award and then-

Marcus Johnson:

I was so close.

Paul Verna:

... move on to the others.

Marcus Johnson:

Victoria and Stewart will probably get one before I get one. I'll be furious. And then they'll bring them to every meeting and they'll have them in the background.

Evelyn Mitchell:

I think Grammys might have some sort of acknowledgement for podcasts as well. Viola Davis won her Grammy for her audiobook, so there may be-

Marcus Johnson:

There's still a chance.

Evelyn Mitchell:

I don't know that for sure though. Don't-

Marcus Johnson:

So you're telling me there's a chance?

Evelyn Mitchell:

There probably is a chance, Marcus.

Paul Verna:

Well, I can tell you as a voting member of the Grammy Awards, there is no podcast category per se, but there is an audiobook category.

Marcus Johnson:

Thanks, Paul. Thanks.

Evelyn Mitchell:

Wait, Paul, I can't tell if you're joking.

Marcus Johnson:

Shooting my dreams out of the sky. No, he actually is.

Evelyn Mitchell:

Oh, my gosh.

Paul Verna:

People usually can't tell if I'm joking, but in this case, I'm not.

Marcus Johnson:

Yeah.

Evelyn Mitchell:

That's really cool.

Marcus Johnson:

Yeah. Paul lives 1000 different lives. Never trust him, ever. He could be a spy. Paul, you are next.

Paul Verna:

Okay. Speaking of spies, I've been enmeshed in the world of digital identity while working on a report on identity resolution. And I came across a data point from Juniper Research that the number of digital identity apps in use around the world will exceed four billion globally by 2027. And that's up from 2.3 billion in 2023, so that's growth of 82%. A lot of this is coming from the use of government-backed digital identities to replace physical identity documents

as a source of verification for third-party apps like in banking or financial services. So yeah, a lot more ones and zeros out there representing us.

Marcus Johnson:

Oh, sorry. I don't know why I pressed the bell. I got excited.

Paul Verna:

It's exciting, let's face it.

Marcus Johnson:

When does the report come out?

Paul Verna:

It comes out sometime in late March. I don't have the date right in front of me.

Marcus Johnson:

Unbelievable. Blake, you're up.

Blake Droesch:

All right. This is from YouGov America. They asked, what foreign ways of doing things would Americans embrace? They listed the following things that are common in other parts of the world, but less common or don't happen at all in the United States. The top answer is that 70% of Americans would prefer it if all areas in a town or city were accessible by sidewalks, making it easier to walk anywhere. Also, very popular would be embracing sales tax that's included in the price of items on store shelves.

Marcus Johnson:

Oh my goodness. Yes, please.

Blake Droesch:

And then, of course, a national minimum paid vacation. What I would be most interested in adopting on a large scale in the US, this only got 47% of Americans on board, electric kettles that can boil water quickly, rather than having to use a stove or a microwave.

Marcus Johnson:

Thank you.

Blake Droesch:

Because I will say, we're the world leaders when it comes to ice and cold beverages. But for some reason, we're okay just waiting five minutes for water to boil for a cup of tea. I just don't understand it.

Marcus Johnson:

It's more like 15.

Blake Droesch:

Yeah.

Paul Verna:

Or a cup of coffee, for those who like instant coffee.

Marcus Johnson:

It's not instant. It's not instant, not in America. Yeah. Not here.

Paul Verna:

That's true. It's not instant if you have to wait three minutes for the water to boil.

Marcus Johnson:

Yeah. Blake, I'm with you on that. The sidewalk thing as well. Come on.

Paul Verna:

Agreed. Agreed. Agreed.

Marcus Johnson:

Well, just they just end, and I'm trapped.

Blake Droesch:

I was very lucky to grow up in a suburban area of New York where we actually do have really nice sidewalks. But when you go upstate a little bit more, the sidewalks disappear and so do



the streetlights. And it's just, you don't understand. It's impossible to walk anywhere without being worried about getting hit by a car.

Marcus Johnson:

Yeah. Yeah.

Blake Droesch:

It's terrible.

Evelyn Mitchell:

Blake, you know can get an electric kettle, right?

Blake Droesch:

Oh, I have one. I have one. It's just, I don't want to bring it everywhere I go.

Marcus Johnson:

Well, the voltage is also half that of everywhere else in the world. Your voltage is 110. Everywhere else in the world, it's 220.

Blake Droesch:

Right. Exactly.

Marcus Johnson:

And so they still don't boil as fast as others. Faster than a pan.

Blake Droesch:

No, I've got a good one. I've got a Smeg. It's the real deal.

Marcus Johnson:

Oh, hello. Yeah. The retail thing as well. You go up to buy something and you're like, "Oh I'm sorry, that's not the price?"

Blake Droesch:

There is one about other things that have come up on the podcast before, such as the usage of bidets and toilet stalls that go directly to the floor and don't have that gap. I'll send you a link to the full article, Marcus.

Marcus Johnson:

Yes, please.

Blake Droesch:

So you can really dive in there.

Marcus Johnson:

Thanks. There goes my weekend.

Blake Droesch:

A lot of the things that you complain about are on this list.

Marcus Johnson:

I commissioned it. All right. Let's end with one from me. Paid health leave, strapping. The US is one of 11 countries that do not offer ... This comes off the back of, I had a paid family leave last week, and now there was a health leave stat in there. That is where this has come from. Paid health leave, the US is one of 11 countries that do not offer paid leave for health problems. Nationally, it's not mandated. Nearly one in three US workers with a serious illness either end up losing their jobs or have to change jobs due to their illness. The US is one of only a few countries in the world with no national paid leave. Of the countries that do, 132 of them offer three or more months, and 62 of them offer a year or more if needed.

The Family and Medical Leave Act, FMLA, does require unpaid sick leave. FMLA provides for up to 12 weeks of unpaid leave, so three months of unpaid leave for certain medical situations. Even though it is not law to offer paid sick leave, most do. Thank goodness. 76% of US civilian workers have paid sick leave as of 2020. That's up nine points from a decade ago. So definitely going in the right direction, but with more room to go. However, that does mean that 24% of US workers don't have paid sick leave. According to the Federal Bureau of Labor Statistics, that's roughly 34 million Americans.

Of folks making about \$15 a month or less, half don't have paid sick leave, half of them. Almost all of higher earners have at least some. People in construction, farming, fishing and forestry work were least likely to have it, rather ironically, the most dangerous professions one can argue. This more optimistic. I'll leave you with this. In the US, 14 states and the District of Columbia, DC, currently require employers to provide paid sick leave to their workers, according to the National Conference of State Legislators. Even though it's not nationally mandated, there are states which overrule that, 14 of them so far. Do you want to impress on this?

Evelyn Mitchell:

I find this data and last week's data about leave fascinating, and it also makes me just want to stomp around in anger.

Marcus Johnson:

Move to Estonia with bliss?

Evelyn Mitchell:

Yeah. Exactly.

Marcus Johnson:

Yeah. I bring you down so the weekend can't get any worse. Only up from here. That's all we got time for for this episode. Thank you so, so, so much to my guests. Thank you to Blake.

Blake Droesch:

Thanks, everyone.

Marcus Johnson:

Thank you to Paul.

Paul Verna:

Always a pleasure.

Marcus Johnson:

And thank you to the winner of the Game of the Week, Evelyn.

Evelyn Mitchell:

Thank you, Marcus. Thanks, everyone.

Marcus Johnson:

And thanks to Victoria, who edits the show, James, who copy edits it, and Stewart, who runs the team. Thanks to everyone for listening in. If you want to want to say hi, you can send us a message on Instagram, [behindthenumbers\\_podcast](#). We'll see you guys on Monday, hopefully, for the Behind the Numbers Daily: an eMarketer Podcast made possible by Meltwater. Happy weekends.