

The Weekly Listen: Will Threads replace Twitter, is the internet turning into TikTok, and 'click to cancel' pushback

Audio

On today's episode, we discuss what to make of Meta's new Threads app, whether the internet is becoming more like TikTok, the argument against "click to cancel," ad-supported versus ad-free video streaming, how shipping works, and more. Tune in to the discussion with our forecasting writer Ethan Cramer-Flood and analysts Zach Goldner, and Evelyn Mitchell-Wolf.

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Episode Transcript:

Marcus Johnson:

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Hello, everyone, and thanks for hanging out with us for the Behind the Numbers Weekly Listen, an eMarketer podcast made possible by Verisk Marketing Solutions. This is the Friday show. That thinks that moose will always win, is that the conclusion we came to? Moose always win?

Evelyn Mitchell-Wolf:

I think that's a reasonable-

Marcus Johnson:

Meese always win.

Zach Goldner:

I can attest, yes.

Marcus Johnson:

Rocks always win.

Ethan Cramer-Flood:

Rocks will always win actually-

Marcus Johnson:

Wrestlers or the geological variety. I'm your host Marcus Johnson, in today's show could Threads replace Twitter?

Ethan Cramer-Flood:

The vast majority of the country and the world that is not on Twitter, are they desperately seeking a Twitter clone where things are just civil? Is that why they weren't on Twitter? I don't think so.

Marcus Johnson:

Is TikTok where the internet is going?

Zach Goldner:

If you look at the metrics people are looking at, companies are looking at, they want engagement, and TikTok is quickly becoming one of the highest engaging platforms out there.

Marcus Johnson:

Advertisers and publishers pushed back at the FTC's Click to Cancel proposal.

Evelyn Mitchell-Wolf:

So maybe the proposal evolves, as they often do, but there is not a convincing argument that making it as easy to cancel a subscription as it is to create one leaves consumers worse off.

Marcus Johnson:

Will ad-supported or ad-free video streaming win? And how items move around the world. Joining me for this episode we have three people, let's meet them. We start with our principle forecasting writer based out of New York City, it's Ethan Cramer-Flood, ladies and gentlemen.

Ethan Cramer-Flood:

Hey-yo. Summertime.

Marcus Johnson:

There he is. Okay, Will Smith. Was that his song? (singing)

Ethan Cramer-Flood:

Yeah.

Marcus Johnson:

We don't have the money to play it, but maybe Victoria can sing it for us. We're also joined by one of our senior analysts on the digital advertising and media scene, based out Virginia, Miss Evelyn Mitchell-Wolf.

Evelyn Mitchell-Wolf:

Hello, everyone. Happy Friday.

Marcus Johnson:

There she is. Yes, indeed. Finally, we're joined by one of our senior forecasting analysts based ... Actually, Zach, where are you these days?

Zach Goldner:

Steamboat Springs, Colorado.

Marcus Johnson:

There he is, it's Zach Goldner.

Zach Goldner:

Hey, Marcus. Hello, listeners.

Marcus Johnson:

Hello, fellow. Welcome to the Weekly Listen, Zach's first time on the show, so welcome to him. Welcome to the listeners. What do we have in store for you? Well, we start with the story of the week, we're talking about Threads, this new app everyone can't help but download, that could replace Twitter maybe. I don't know, we'll talk about it. We then move to the debate of the week where our panel will give the best for and against arguments on each of the three stories we have for you. Then we end with dinner party data, that's where we talk about some random trivia.

But we start with the story of the week. Could Threads replace Twitter is the question. Instagram owner Meta has just released a new companion app to Instagram called Threads, a Twitter rival potentially. It's beaten a record set by OpenAI's ChatGPT app, it appears to have taken the crown as the most rapidly downloaded app ever. Quite easily, quite handedly beating ChatGPT. It had 10-million signups in the first seven hours, 100-million users within a week. It took ChatGPT two months to reach that number. Threads is positioned as a realtime public conversations' app, or a tech space Instagram, if you will. In order to sign up for Threads, users must have an Instagram account. Folks who already had an Instagram account were able to log in with their existing usernames and follow the same accounts on the app as well. It's here, folks. We've been hearing a lot about it. Initial reactions?

Evelyn Mitchell-Wolf:

Does anyone have a Threads account here?

Ethan Cramer-Flood:

No.

Zach Goldner:

We downloaded it to see what it's all about.

Marcus Johnson:

Zach's been enlightened. Talk to us.

Zach Goldner:

Well, I do have to say ... So first of all, I want to get it out of the way, I think we're all really looking forward to the wildly anticipated cage match between the two tech billionaires, Elon versus Zuck. But Zuck decided to take the high road and just copy yet another social media platform, but it's pretty bare bones when comparing it to that of Twitter. But it should be a huge warning and alarm bells should be ringing throughout all of Twitter's offices, and the 20 employees left at Twitter I'm sure are very scared at the moment.

But with that being said, so Threads has the integration factor with the add of Instagram, and what that means is that Threads is able to attach itself to Instagram's user base. If you were to look at it with the US, that's over 100-million US users, 135, and worldwide that's 1.4-billion users that it could attach to. So with that being said, Threads right now is at 100-million global users, and comparing that to Twitter, I believe Twitter's monthly active users is roughly 500. So within five days, it's reached one-fifth of the audience of Twitter. So big alarm sign. As of right now, it still is very much a shell of what Twitter is, but it's going to be a safe haven for that brand, and it's going to continue to take away ad dollars from that of Twitter.

As of right now, Threads is not advertising, but it should be scary for Twitter moving forward as more advertisers may pull some of their ad dollars and go over towards Threads.

Marcus Johnson:

Evelyn, do you have an account?

Evelyn Mitchell-Wolf:

I do not, and I decided not to make an account because if you create an account, you can not delete that account, that Threads account, without deleting your Instagram account as well. I

just was like, "I barely use my Twitter as it is." I haven't tweeted since 2017, so it didn't feel like the need was there to then risk needing to deactivate my Instagram account, which I use very frequently. So maybe I'll create a fake Instagram account just to see what's going on in Threads. But from a personal decision making standpoint, I just am not there yet. Maybe one day.

Marcus Johnson:

Okay, okay. Zach mentioned how many people have jumped on board already is quite staggering, but yes, they made it pretty damn easy. A couple of clicks and you already have an account.

Zach Goldner:

Very easy, just give over all of your personal data, and there you are, a Threads member.

Evelyn Mitchell-Wolf:

That data situation is freaky. That's why in the EU Threads has not launched yet, because there are some big question marks there as it pertains to the Digital Market Act. So the data piece, that's also another reason I decided not to make a Threads account. Meta already has enough information on me I think.

Marcus Johnson:

Yeah. Threads, so it launched in over 100 countries, so the US, Australia, Canada, Britain, Japan, but none of the 27 EU countries, because as Evelyn pointed out, tougher data privacy rules. But yeah, easy to set up, and that's why a lot of people have joined. Going to a different space, town square, nightclub, whatever, bar, and they're seeing some familiar friends in that space. You download the new app and existing Instagram folks can import all of their same functionality, and also the same features, their bio, their username, profile photo, follower list. So it's easy to get set up and you don't have to start growing those followers from scratch.

It seemed like Mr. Zuckerberg has had his eye on Twitter for a while, he tried to buy them back in 2008, Twitter said no. Now he's gotten around to creating somewhat of a clone. A lot of people are saying it looks almost identical, as Zach mentioned that it's a scaled down version. Looking at a side-by-side, so in terms of post link it's about double for threads, about 500 characters to the 280 for Twitter. Links, you can have on both. Photos, you can have on both. Five minutes worth of video to 2:20, two-minutes-20-seconds for Twitter. Then there's some

stuff that Threads is missing, there's no edit functionality, similar to Twitter in some respects, but no direct messaging, trending stories, hashtags, things like that over on Threads, that Twitter does have. What do you think, Ethan, when you stack Threads up against Twitter? Is this a viable contender for a lot of the share of the microblogging world?

Ethan Cramer-Flood:

Yeah. You phrased this as how big of a problem is this for Twitter, and I guess the answer is it's a problem for Twitter, sure. I guess 100-million downloads is moderately impressive, but I have dark cloud negativity infused hot take on this entire endeavor. In that it's not so much about only Twitter, it's about both. I think the most likely outcome for this whole business is that it's going to be a lose-lose proposition for both.

Evelyn Mitchell-Wolf:

Yeah, I can see that.

Ethan Cramer-Flood:

It doesn't seem very likely to me that either is going to come out the other side in a good position. This is not a fight that anyone's going to win in a way that will make the rest of us think, "Oh, what a triumph for X or Y." There's not enough people on Twitter that hate Twitter and want to leave it to go over to Threads, to make Threads a booming success. So we know that Twitter is struggling, they're losing people, they're losing time spent, they're losing users and they're obviously losing a lot of advertising revenue, but there is a significant subset of existing Twitter users that are perfectly delighted with the rage infested cesspool of poison and hatred and anger and yelling that is that town square that Elon wanted it to be.

They're happy there, they're not going to leave because that's what they like. Then among the folks that will leave, and have already started leaving because they don't like it, sure, they'll go over to Threads, but how many people? Maybe that could be some millions, but that's not a lot. That's not 100-million, much less a billion, or whatever it would take to really I guess move the needle and make Threads a really bang-up investment on the part of Meta. Then there's the whole grand rest of the world that isn't on Twitter in the first place. So I guess they're assessing are all these people, the vast majority of the country and the world that is not on Twitter, are they desperately seeking a Twitter clone where things are just civil? Is that why they weren't on Twitter?

I don't think so. They want video and images, that's why TikTok is TikTok, that's why everyone is spending all their time where they're spending it. So there could be some folks at the margin that will join, and maybe Meta's internal numbers would consider it a success if they just did okay, some marginal increases in the total umbrella of users and time spent on the Meta empire, and some marginal increases on advertising at the expense of Twitter. Maybe that's a win, but I think both them of them are going to come out smaller than expected.

Evelyn Mitchell-Wolf:

Yeah. I think that makes sense, especially the initial hullabaloo about it, about how quickly people are signing up for it, it is easy to sign up for it, but then the challenge becomes, all right, the novelty's worn off, are people actually going to use this? Especially if they weren't already using Twitter, like you mentioned, Ethan. If they didn't have a reason, a specific use case that Twitter was serving for them, or if they weren't microblogging in the first place, once Threads is old news maybe they'll just stop using it. Maybe they won't delete because they have their Instagram that they're still using, but just having people sign up is not the battle.

Zach Goldner:

That's a great point. My one other point of why I could see Threads really not thriving is that when it comes to Twitter, people are there to go on a debate on politics or technology, and things are going to get thought-provoking. When it comes to that of Threads new app, the way their algorithm is working is it's not pointing you towards that same mind-altering, infuriating drama. It's going to be, once again, more of a brand safe area where brands are going to hop off away from Twitter, it's not going to be the most engaging content. At least, not as of yet. For that reason, I could still see those that are using Twitter to continue to use Twitter, and those that are going to Threads are going to try it out for a little bit until it really doesn't groove, and goes away from you just viewing the largest brands that you follow for it to really have their own sects of people, different groups.

Marcus Johnson:

Ethan, you mentioned ... These are all really great points. Ethan, you mentioned the marginal increases at the expense of Twitter, and that's incredibly true. Marginal being the main word there, because Twitter, for all the headlines it grabs, is still at 0.6%, less than one percentage point of the US digital ad market. It's about four-times smaller than TikTok at this point in US

digital ad revenue. So yeah, if they are going to take those dollars, advertisers I'm sure, if they took their Twitter dollars and spread them over the Meta ecosystem that might make it a little bit easier to spend those dollars than having to do it on a different platform, maybe they like hedging their bets across different platforms. As Zach mentioned, no ads for the first year on Threads.

So we'll see, Twitter considering legal action claiming Meta hired dozens of former Twitter employees who had and continue to have access to Twitter's trade secrets and other highly confidential information that ultimately helped Meta develop what they termed the copycat of the Threads app. So we'll see where that goes, if anywhere. Me and Jasmine Enberg, who's one of our principle analysts covering social media, will be talking about Threads on Monday. So tune into that episode for a slightly deeper dive on this topic.

Ethan Cramer-Flood:

Could I give one more point? A strategical move from Zuckerberg, there's been a lot of talk about the status of Twitter's health fiscally, is it going bankrupt? What's going to happen? As we talk about those incremental dollars, maybe it's incremental when it comes to Meta, it's already got billions and already by far the largest social media platform. But if you take a revenue source away from Twitter, that's trying to get as much money as they can at the moment and are really scrounging for those little ad dollars, if it does go bankrupt, you're taking away a platform that has a dedicated user base, which means more engagement to the Meta properties over time, once again that will translate to more ad revenues and less of a potential threat moving forward.

Marcus Johnson:

Yeah. Fine points indeed, folks. That's all we've got time for the story of the week. Time now for the debate of the week, today's segment, make the case. This is the segment where our panel, Evelyn, Zach and Ethan, present the for and against arguments for each of the following stories based on three news stories. It's two contestants on the face-off per question, also the following takes don't necessarily reflect the analysts personal views, their job is just to present the best case regardless and offer objective analysis. So three questions, as I mentioned. For question one it's Zach going up against Evelyn.

"TikTok is where the internet is going," writes Sara Morrison of Vox. She believes that TikTok is the ultimate example of how our digital world is shifting from seemingly limitless possibilities

in choice, the internet of her formative years, into a controlled experience that's optimized to know or decide what we want and then deliver it to us. TikTok, she thinks, is one of the best examples of this change. The social app is designed around discovering content for you and not giving you a platform to find it for yourself. The question is, is TikTok where the internet is going? Zach, I'll start with you. So TikTok is where the internet is going. 60 seconds on the clock, make the case.

Zach Goldner:

Yeah. TikTok is addictive, it's unlimited entertainment, it's an ADHD inducing app where if you look at the metrics people are looking at, companies are looking at, they want engagement. TikTok is quickly becoming one of the highest engaging platforms out there. I like to think about it compared to what cable channels used to be. People would turn on their TV and just flip through the channels without even having a guide, and they just wanted to be given content, not necessarily knowing what that content is. So with that, it's people being forced this content and not them deciding upon themselves.

When it comes to somebody like Netflix, there's a study from Nielsen that looks that people spend roughly 10 minutes a day on their smart TVs deciding what to watch. With TikTok, you immediately open the app and you are given your American Home Videos, or you're looking at your old Vine content, stuff that's highly engaging that people really do enjoy. There's a reason why TikTok is the app that everyone talks about.

Marcus Johnson:

Yeah. You mentioned engagement, so TikTok, close to an hour a day being spent on TikTok in the US by TikTok users. That's just shy of how much time people spend with Netflix in the US. Evelyn, TikTok isn't where the internet is going. One minute on the clock, make the case.

Evelyn Mitchell-Wolf:

So the article we read was really interesting and used TikTok and elements of the TikTok experience to illustrate the future of the internet where the pendulum has swung away from endless choice and information overload to everything is decided by platforms. But it's called a pendulum for a reason. I don't there will ever be a world where people give TikTok or Meta or YouTube complete control over every piece of information they seek. Plenty of people have given those platforms the reins to the information they receive, but the central premise

of this argument is that people are losing their ability and their will to have agency over their content consumption on the internet.

Decision fatigue is very real, but one can recover from it. It's true that platforms are agents these days, as they have been in the past, per Zach's point, it's just not conceivable to me that the future of the internet is, A, homogenous, where every experience is force-fed to us by one platform or another, and B, that we can completely lose the behavior or the need to do our own research or connect with other humans. One of the big questions that stuck out to me was who gets to control what you are seeing of reality? Regulators are already keenly aware that this could end up in existential crisis territory, and I doubt that they'll just give up and let platforms continue on their merry way. There has to always be access to un-curated information.

Marcus Johnson:

Strong start, folks. Very strong start indeed. We move to question two, Evelyn against Ethan this time. "Publishers and advertisers push back at the Federal Trade Commission's Click to Cancel proposal," writes Katie Dayton of the Wall Street Journal. The FTC recently proposed a requirement that companies offer consumers an easy click to cancel way to get out of subscriptions and memberships. Trade groups representing these parties, publishers and advertisers, have come out against this saying that, "Mandating a simpler cancellation process would confuse consumers and create problems for businesses." The question is, is a Click to Cancel proposal likely to pass? Evelyn's up first, a Click to Cancel proposal is likely to pass. Evelyn, make the case.

Evelyn Mitchell-Wolf:

The arguments against this proposal are ludicrous. Truly they are so out of touch, they have elicited several guffaws from deep within me. The Association of National Advertisers argues that consumers are accustomed to complicated cancellations, so accustomed such that any efforts to simplify the process might only cause more confusion. I understand that it is in business's best interest to keep customers in their subscription ecosystems, not just because of the revenue that it generates, but also because these relationships are crucial components in first-party data strategies across the ecosystem, and there are some elements of the outcry from businesses that are worth considering.

For example, a consumer might actually benefit from a discount offer. If they're canceling a subscription because it's no longer in their budget and the discount solves that problem, that's a win-win. But I don't think the proposal is really targeting that kind of exchange. The proposal is targeting that frustrating situation that we have all encountered where you have to click seven times, yes, I want to proceed, yes, I acknowledge that I will lose this benefit. No, I don't want the free gift to stay. So maybe the proposal evolves as they often do, but there is no convincing argument that making it as easy to cancel a subscription as it is to create one leaves consumers worse off. Since the FTC's remit is to protect the consumer's interest, it's only a matter of time before this proposal becomes reality.

Marcus Johnson:

They did say that you could make it so easy you end up doing it accidentally, so canceling things accidentally.

Evelyn Mitchell-Wolf:

I think it's just a hypothetical they're bringing up to just try and throw a bowling ball in the argument and hope it hits something.

Marcus Johnson:

Yeah. I can't think of a space in life where that's true, where you accidentally like, "I canceled the mortgage payment again because of that one-click policy. We don't have a house anymore, sorry, guys." Ethan, it's a tough argument to come back against. Click to Cancel proposal isn't likely to pass, make the case.

Ethan Cramer-Flood:

You really gave me the fun half of this one.

Marcus Johnson:

You're welcome.

Ethan Cramer-Flood:

So here's why Evelyn's wrong. So when I was studying international affairs, a wise professor of mine once told me that, "When it comes to politics, government, whether domestic or international, you can make a lot of money gambling that any given thing is not going to

happen. Anytime someone tells you that something is going to happen when it comes to government, politics or policy, just bet them \$10 that it's not going to happen." Because in reality, most things don't happen. Most things don't get done, and particularly with the US government most things don't get done, and the reason they don't get done is there's all sorts of ways to gum it up. There's all sorts of ways to bog this down.

The people opposed to it are going to spend millions and millions of dollars lobbying against it, you can get Congress involved, it's not just going to end with a nice sunny proposal from the FTC. Someone's going to argue about what their powers really are, something bigger, more important is going to come up. This issue probably does have bipartisan support, but it's also probably nowhere near the top of anyone's agenda because there's so many other things going on. That is why this proposal is not going to happen. How's that?

Evelyn Mitchell-Wolf:

Pretty good.

Marcus Johnson:

Yeah. Hit you with some-

Zach Goldner:

I vote Ethan.

Ethan Cramer-Flood:

You thought I had no chance. I went with cynicism.

Zach Goldner:

Throw us a curve ball right there, I liked it.

Marcus Johnson:

That was more philosophical than I thought we were going, we got struck with Ethan Gandalf Cramer-Flood. That wasn't bad, that was not bad at all. All right, folks, we move to our third question. We're going ad-supported versus ad-free video streaming, and it's Zach against Ethan.

Evelyn Mitchell-Wolf:

Wait, hold on. I just have to say, because now I'm stuck on Ethan's argument, I feel like maybe these businesses should have just stayed quiet. Because I feel like putting all these arguments out there that seem so, that are so ludicrous just makes them look bad and maybe they will muster up some, out of spite the government will do something. If they had stayed quiet, then I think you're right. It would have probably just, inertia would have taken hold of the situation. Anyways, sorry.

Marcus Johnson:

No, you're good.

Ethan Cramer-Flood:

We'll see.

Marcus Johnson:

I'm waiting for Ethan to be like, "All we have to decide is what to do with the time that is given to us." Boom. That's a good point there, Evelyn. Move to our third question, ad-supported versus ad-free video streaming. Zach against Gandalf. Karlene Lukovitz of MediaPost writes that, "25% of SVOD subscribers and 32% of new signups are now ad-supported." 25% of SVOD subscribers, subscriptions, and 32% of new signups are now ad-supported, according to Antenna. Both numbers, the 25% and the 32% are up from 18. So it went from 18 to 25, the other went from 18 to 32, and it was at 18% before the pandemic in 2019, and those numbers now are 25% and 32% today. The question is can ad-supported overtake ad-free video streaming that we've become used to because of people like Netflix who just had that for so long. Zach, you're up first. Ad-supported video subscribers can overtake ad-free video streaming subscribers. One minute on the clock, make the case.

Zach Goldner:

Yeah. Ad-supported video right now is the way video is moving. As you can look at platforms like Netflix, Disney+ and others that have been releasing their new ad tier products, they're doing that because that's the way that the US consumer is trending. They want to have that option, because as we look at America as a whole right now, we have the average American household income of the middle class, it's not growing that much. The amount of options out there for content are continuing to grow. So if someone's still trying to watch their favorite show on Netflix and still watch Ted Lasso on Apple TV, they want to have the option to pay as

less as possible. With that, they're able to subsidize that with watching ad-supported content. So if we were to look at some of the largest subscription OTT platforms, like Netflix or HBO Max or Disney+, all of those right now are less than a third of their users currently with ad-supported, and that leaves a lot of room for growth. That's why I believe that ad-supported can overtake ad-free.

Marcus Johnson:

Ethan, ad-supported video subscribers can't overtake ad-free video streaming subscribers. Make the case, please sir.

Ethan Cramer-Flood:

So first of all, we're going to circle back a little later about how when Marcus needs to think of a philosopher to make fun of someone about, Gandalf is who he comes up with.

Marcus Johnson:

That's my go-to. There's no one wiser.

Ethan Cramer-Flood:

So stick a pin in that. In the meantime, so Zach is right that the ad-supported tiers are doing well, growth is strong. Then I'm not even sure if this article referenced the fact, the free ad-supported TV services, which also have shown bang-out growth in their viewership. So all of this has gone really well, and I can't deny that, but you phrased the question can ad-supported overtake the paid ad-free subscription services, and I'm going to turn Zach's stats back on him and say no, I don't think it's going to overtake it. That's too extreme, because the lead is just too big.

So we're seeing a lot of people are gravitating towards saving a little money by seeing some ads, and definitely people are gravitating towards those fast services, and that's great. That's millions of people and those are going to do really well. I don't have anything negative to say about that. But Netflix is 170-million viewers, the vast majority of whom are paying and are perfectly happy to pay to have it with no ads. Amazon Prime, one of my stats is like 70% of US households already have Amazon Prime with no ads on it. These things are just huge, way, way, way out in the front, and there's no indication that people are going to get rid of them or downgrade.

Netflix is canceling the password sharing and people are just signing up, they're just paying for it. Everyone's used to this, they're used to what they have already. So I think new, if we're talking about new subscribers and new signups, I think you're going to see a lean into some of this ad-supported stuff to save money. But overall, four of the five biggest ones, Netflix, Amazon, Disney and HBO, the vast, vast majority of their viewers are paying to avoid ads. There isn't much of a signal that they're tired of that, that they're going to go away from it. So they're way out in front. So you're going to see success in the ad-supported tiers, but that's not going to be the predominant way this goes.

Zach Goldner:

So I'm not going to refute any of Gandalf's points, they're all great, but just do want to comment on the fact that you are seeing a huge increase in the amount of OTT viewers that are watching advertising content. So going back to 2018, it's just a quarter of people that are watching OTT would be watching advertising video on demand, and if you were to look at it today it's over 60%. So that is the trend of where we're seeing it grown, whether it overtakes or not, we'll see if Gandalf is correct in his assumption. That will be all I have to say on that.

Marcus Johnson:

Ethan, if this was a game of the week, that would have been an immediate ejection. You weren't even remotely close to a minute long. We would have got security to carry you out immediately. But that was a good answer still.

Ethan Cramer-Flood:

I know it was long-winded, I remember a lot of one-liner quips that-

Marcus Johnson:

Oh, he's full of them. I will not say do not weep, for not all tears are an evil. Guys, serious, what can't he do? I know this show got deep real quick. But nice job to our panel tackling these stories for the debate of the week. Some excellent points, folks. Let's move on, it's time now for dinner party data. This is the part of the show where we tell you about the most interesting thing we've learned this week. We start with Ethan.

Ethan Cramer-Flood:

Oh, okay. So I decided to check out some weather related data, so I hope everyone is psyched this year about how hot it is.

Evelyn Mitchell-Wolf:

Nice.

Marcus Johnson:

Just because I'm English doesn't mean-

Ethan Cramer-Flood:

It's really hot.

Zach Goldner:

... reviews very engaging with his weather facts.

Ethan Cramer-Flood:

Yeah. You guys notice that it's hot? Anybody else notice? Okay. I saw on the news or reading, whatever, I saw that the national media is covering the fact that it's been over 100 degrees for X-number of days straight, whatever, a week straight, 100 degrees every single day in some of these places. The projections are two more weeks straight of over 100 degrees, and so we're getting all the usual breathless coverage of how unbearably hot it is. This has resulted in tragedies, and certainly a lot of pain and difficulty in a whole bunch of different places.

So I was like, "All right, I live in New York City and I'm from Syracuse, this all sounds terrible, but I don't even know how to put this in perspective." So I wanted to check and see exactly how usual or unusual, because the media sometimes is like, "All right, are we just talking about how hot it is in Arizona and Texas because we just have to have something to talk about, or is this really unique, what's going on now?" It's a little bit of both. So the statistics I came up with do show that this is bad, things are bad, things are getting worse, but there are certainly some localities in this country, including many of the ones that are getting nailed right now, for whom this is not unusual at all.

This is normal life, and the rest of us in the country listening to this news are like, "Oh, my god. That's terrible." But it's actually pretty normal. So my data finds have to do with this 100-degree marker. So in Phoenix, which is one of the cities that is currently dealing with X-number

of days in a row, they average 111 days per year where it gets to be over 100 degrees. 111 days per year, and the record was 145. So the fact that they're going to deal with 21 in a row, I'm sure that's very exhausting and painful, but they average 111. Las Vegas averages 78, this is days in which the temperature gets to be over 100 at some point. I'm not saying 24 hours straight. Las Vegas averages 78, Dallas averages 20, that's less, but they have reached 113.

So I had different conclusions when I saw some of this data. I was like, "To some degree it is probably the media doesn't have much to talk about and so they're freaking out." The national media is freaking out about how hot it is, but the people in Phoenix are like, "We do this 111 times a year. It's really not the end of the world." There were some surprising results though, just since we are on dinner table data of the week, in that while Phoenix averages 111 and once did 145 days over 100, the most days that Miami has gone over 100 degrees in a year is one. One day, they've never had more than one day.

Evelyn Mitchell-Wolf:

That is so surprising to me.

Ethan Cramer-Flood:

New York City did four, my hometown Syracuse did two. So we are in very different universes, but for some folks right now that are probably watching the national news saying, "Wow, the country's freaking out about how hot it is here." But frankly, for them it's normal.

Marcus Johnson:

I can't help but think to those people that they should move. Something to think about. You also said dinner table data, that's a different segment, we're more fun than that. Normally we are, when we don't talk about the weather. You've taken the party out of the segment unfortunately.

Ethan Cramer-Flood:

I don't even know what show I'm on.

Zach Goldner:

Ethan, I want you to find me the place of most consecutive snow days, that's where I'm going.

Marcus Johnson:

Don't encourage him, for the love of God.

Ethan Cramer-Flood:

Well, when we get back together in the winter to do this show, I'll give you that data.

Marcus Johnson:

You two are never going to be on again at the same time. We can't recur that discussion. No, that was fascinating, good stuff. Evelyn, you're up.

Evelyn Mitchell-Wolf:

Okay. So today is National French Fry Day, in April All Recipes published a ranking of fast food french fries where they rated each fry on freshness, crispiness, saltiness and the ability to be eaten alone without a dipping sauce. I have-

Marcus Johnson:

I thought you meant by yourself.

Evelyn Mitchell-Wolf:

Anyone can eat fries by themselves, I think that's honestly peak activity. But I have the ranking right here. So which fast food chains do you all think are in the top three fry positions?

Marcus Johnson:

We'll have to revisit the peak activity thing, because I'm worried that you're not getting out enough. But we'll come back to it, we'll come back to it. What was your question?

Evelyn Mitchell-Wolf:

What fast food chains do you think are in the top three fry positions?

Zach Goldner:

For fries sold? Volume? Favorite?

Evelyn Mitchell-Wolf:

No, for best fries. Best tasting, best experience.

Ethan Cramer-Flood:

People love McDonald's fries.

Evelyn Mitchell-Wolf:

McDonald's is number two, Five Guys has two positions, one for their regular fry, which is number four, and one for their Cajun fry, which is number seven. I'm not sure why they have different-

Zach Goldner:

Chick-fil-A.

Evelyn Mitchell-Wolf:

Chick-fil-A's number three.

Marcus Johnson:

The one on the West Coast, In-N-Out Burger.

Evelyn Mitchell-Wolf:

Not on the list, because it has to be a national chain.

Marcus Johnson:

We don't know the number one. Wendy's?

Evelyn Mitchell-Wolf:

It is Wendy's.

Ethan Cramer-Flood:

Really?

Evelyn Mitchell-Wolf:

Yeah.

Marcus Johnson:

Wendy's. I've not hung out there yet.

Evelyn Mitchell-Wolf:

Their fries are pretty good. Do you all have an idea on the last, the lowest ranking fry?

Ethan Cramer-Flood:

I'm not a fry aficionado.

Evelyn Mitchell-Wolf:

It's Popeye's.

Ethan Cramer-Flood:

Popeye's.

Marcus Johnson:

What?

Evelyn Mitchell-Wolf:

Popeye's is ranked last on this list, number 12.

Marcus Johnson:

Okay, forget it. We're cutting this whole segment out.

Evelyn Mitchell-Wolf:

Disagree?

Marcus Johnson:

Popeye's, I'm so sorry that this just happened. Absolutely, their everything is good. Let's be real.

Evelyn Mitchell-Wolf:

For what it's worth I agree, Popeye's fries are delicious. It is a subjective ranking, but there you go.

Marcus Johnson:

Yeah, it is. Don't listen to anything Evelyn just said. Well, Zach, you're up next, mate.

Zach Goldner:

I'm going to regurgitate some info here, but there's a lot of news out there right now about a new energy drink on the market. The energy drink is called Prime Energy, and it's been called to be investigated. So this right here is out for those parents that are trying to be conscious of how much caffeine their kids are in-taking. Well, this popular drink is promoted from famous YouTubers Logan Paul and KSI. I know, you probably don't know them or you've heard of them in the news for some outrageous thing, but there's been a lot of concerns that they're being advertised towards kids. Think about Jewel, but for that of caffeine.

So just as a note about how much caffeine Prime Energy has, it has equivalent to two cups of coffee or six cans of Coca-Cola. So next time you find that 12-fluid-ounce can of Prime Energy, just think about how much caffeine you're really in-taking.

Marcus Johnson:

Not enough is the answer. Get two, get two off the shelf.

Evelyn Mitchell-Wolf:

Two cups of coffee, it would send me vibrating off the planet, but I think for most people ... If I had two cups of coffee in a row, I probably would not ... My metabolism would freak out. But I feel like two cups of coffee is not actually that much caffeine. Most people can-

Ethan Cramer-Flood:

Yeah, no. That's normal for some of us in the morning.

Zach Goldner:

I think the main concern is the primary drink they have is a sports drink, and now they have this new energy drink and they believe that it's being advertised to the same demographic. They want to have a sports drink and then caffeine, and way too much caffeine, we've all probably seen those kids that are bopping around with too much energy. We don't need more of that.

Marcus Johnson:

Kids are the worst.

Evelyn Mitchell-Wolf:

Red Bull sponsored by acapella group one year, that was wild. We all really, really went too much with the Red Bull.

Ethan Cramer-Flood:

I didn't consume caffeine at all when I was a kid or a teenager.

Evelyn Mitchell-Wolf:

That was in college, I feel like that's different.

Ethan Cramer-Flood:

Yeah, college is when it changes.

Marcus Johnson:

There we are.

Zach Goldner:

That's when it changes.

Marcus Johnson:

Very nice. I've got one for you real quick, I thought I was going to have the most painfully data for this segment, but Ethan, thanks for showing up, man. You really outdid-

Ethan Cramer-Flood:

Weather.

Marcus Johnson:

Weather, exactly. I was like, "I've got some stuff on shipping." So it's not going to be that bad apparently. So I've got a couple of things for you about shipping, how stuff moves around the world. 80% to 90% of the world's goods are transported by ship, so everything basically. Last year's global shipping fleets numbered over 100,000 ships, including tankers, block transports, container ships. In a single year, a container ship travels the equivalent of 75% of the way to the moon and back in one year, container ship. Painstakingly slow pace, but that's because they're huge.

The largest container ships are 1300-foot long, 400 meters for our non-American people. That's eight planes long, end to ends, end to end to end. They carry up to 20,000 containers each. This is insane. It's hard to wrap your head around until you Google container ship, and

then you're like, "Good God, it would be a nightmare." I always think if they put one at the bottom and they're like, "Where's that container of basketballs. Oh, dammit. It's at the bottom, we have to get out. We've got to take all the stuff off the top." We've all been there. Almost every shipping container is built in China, 97% of them. Finally, about one-third of the world's ship crews have no means of communication whilst at sea.

Evelyn Mitchell-Wolf:

Oh, my goodness.

Marcus Johnson:

Even worse than that, only 10% have any kind of internet. My God, they have to talk to each other. Yuck.

Evelyn Mitchell-Wolf:

I was wondering, as you shared these stats, how many people have jobs, seafaring jobs these days, and compared to history.

Marcus Johnson:

1.5 million. Oh, I don't have historical data, but about 1.5 million people are part of the shipping work. Yes, yes. But not as many as I thought, considering that they ship all the stuff in the world. I guess they're just over the water.

Evelyn Mitchell-Wolf:

They probably automated everything down to a T, where they don't even really need very much supervision on the ships. But I'm curious though about how many compared to in history where the sea has always been, not always, but for a major part of our history a big economic hub. So I would be curious to know compared to previous eras where we sit.

Marcus Johnson:

Yeah. Ethan will not be looking into that for you, because he's busy looking up horrifyingly boring weather stats.

Ethan Cramer-Flood:

These dinner parties are just banging.

Marcus Johnson:

Please never invite me to one that you and Zach are part of. But that's what we've got time for. I can only imagine how thrilling these forecasting meetings, what the hell happened after I left the team, huh? Just all downhill, just all downhill. I've got a speech, I should think about this. Anyway, that's all we've got time for for this episode. Thank you so much to my guests, thank you so much to Ethan.

Ethan Cramer-Flood:

Always a pleasure.

Marcus Johnson:

Thank you to Evelyn.

Evelyn Mitchell-Wolf:

Thank you, Marcus. Thanks, everybody.

Marcus Johnson:

And thank you to Zach.

Zach Goldner:

Yeah, thanks for having me.

Marcus Johnson:

Yes, indeed. Thank you to Victoria who edits the show, James who copy edits it and Stuart who runs the team. Thanks to everyone listening in. You can head to [BehindTheNumbers_Podcasts](#) on Instagram, we're not on Threads quite yet, if you want to say hi to us. We'll see you guys on Monday hopefully for Behind the Numbers Daily, an eMarketer podcast made possible by Verisk Marketing Solutions. Happiest, happiest of weekends.