Suzy Davidkhanian, Paul Verna, and Blake Droesch

The Weekly Listen: Is GenAI looking for a problem to solve, will ads in cabs accelerate, and how fast do people need things?

Audio

On today's podcast episode, we discuss whether GenAI is just a solution in search of a problem to fix, how the video streaming world has shifted already this year, how significant of an ad battleground the back seat of a cab can be, how fast people need things delivered, what the most popular pets in America are, and more. Tune in to the discussion with our analyst Blake Droesch and vice presidents of content Suzy Davidkhanian and Paul Verna.

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Episode Transcript:

Marcus Johnson (00:00):

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Marcus Johnson (00:24):

Hello everyone and thanks for hanging out with us for the behind the Numbers Weekly Listen and eMarketers podcast made possible by Awin. This is the Friday show that doesn't really prepare right Blake? I had a meeting with Blakely prepared right before such a light right before this and right at the end of the meeting, Blake, half an hour before this recording, right at the end of the meeting, Blake goes, I've got a jump cause I have a meeting in 20 minutes I have to prepare for. And then I realized he meant it was if this recording is what you were talking about.

Blake Droesch (00:56):

That's correct. Okay. I'm very prepared. I was putting say the finishing touches on my preparation, but I was up last night basically the entire night.

Marcus Johnson (01:07):

It's safe. No one believes that I'm your host, Marcus Johnson. In today's show is Gen AI a solution in search of a problem.

Suzy Davidkhanian (01:14):

If you understand what you're trying to achieve from the technology, then you will start to use it more and more and it's just maybe we're very efficient people and we don't need it. Right? The

Marcus Johnson (01:24):

Shifting video, streaming tides,

Paul Verna (01:26):

The aspect of YouTube and Netflix in particular, but also other as VOD streaming video on demand services, having a great share of the time spent. That is about 40% of the story.

Marcus Johnson (01:39):

Where is the next ad battleground?

Blake Droesch (01:41):

So that goes to Shelby that that's not super strong, so I think they're going to need to build out some sort of media ecosystem around it in order to get customers to engage in it.

Marcus Johnson (01:51):

Delivery expectations are shape shifting and the most popular American household pets. Join me for this episode. We have three people. Let's meet. Then we start with our senior analyst who's based in New York City. He covers everything retail and e-commerce. For us, it's Blake Dros.

Blake Droesch (02:13):

Great to be here, Marcus.

Marcus Johnson (02:15):

Extremely under-prepared. Hello. We're also joined by head of that team and vice president of content, also based in the city. It's Susie David Canyon.

Suzy Davidkhanian (02:23):

Hi, I am so happy to be here.

Marcus Johnson (02:25):

Hello. Hello. And finally we have one of our VPs of content covering advertising, media and technology based just above where they are. It's Paul Vener.

Paul Verna (02:34):

Great to be here. And yes, I'm above New York, which means I'm hovering over New York.

Marcus Johnson (02:40):

You are not literally above it.

Paul Verna (02:42):

You never know. Although

Marcus Johnson (02:44):

Last time I was in New York I did look up just to check is he up there? Anyway, what we start with story of the week. That's where we're going to begin. We'll talk about gen ai. Then we've got the new game, the brand new game. It's the second time we're doing it. It's not brand new. We'll talk about that later. And then we've got dinner party data. That's our random trivia portion, but we start of course with a story of the week.

Marcus Johnson (03:09):

Is Gen AI a solution in search of a problem? Scott Rosenberg of Axios believes. So he says that Silicon Valley is still struggling to explain generative AI's utility ai, chatbots and image generators are making headlines and fortunes, but a year and a half into their revolution, it remains tough to say exactly why we should all start using them. He notes that the common rationale is everybody's going to be using them, so you might as well get on board. Now, New York Times columnist Ezra Klein says, I consistently sort of wander up to the ai, ask it a question, find myself somewhat impressed or unimpressed at the answer, but it doesn't stick for me. It is not a sticky habit. It's not really clear how to make AI part of your life quotes. Paul, I'll start with you. Is gen AI a solution in search of a problem?

Paul Verna (04:04):

I think so. I think there are a lot of potential use cases and there's an assumption that we're going to get there, but as of right now, some of the ways in which, at least in the world that I cover advertising and media, some of the ways in which people thought AI would be very disruptive have not materialized. Instead it's been useful in other areas. So as an example, the concern, and this gets to the point about image generation, the concern early on was that AI would completely revolutionize content creation or ad creative and that people would lose jobs and that the whole process would be turned upside down. That really hasn't happened. Where practitioners are using AI is in measuring and targeting in the more technical aspects of harnessing all this data. But in terms of the creative process, that hasn't happened. So in some ways I think it is the tool set is there but the applications haven't really panned out. Of course that could change tomorrow.

Suzy Davidkhanian (05:12):

I have so much to say about this.

Marcus Johnson (05:14):

Here we

Suzy Davidkhanian (05:14):

Go. Ready?

Marcus Johnson (05:16):

No, but go on.

Suzy Davidkhanian (05:18):

I would actually say AI is different from gen AI in retail at least we've been using AI forever and a day and it's always on the back end. I just think that the framing of that question is a little bit weird and it's not that it's looking to create a problem, it's trying to solve a problem and to your point, it's better understanding the difference between industries and people. So am I going to go to chat GPT or any kind of random app to help me with my day-to-day? Probably not, although we are trying from a workflow perspective to use gen AI and what we do, but on the backend in retail, at least when you think about chatbots that are smarter or if you think Amazon that's doing all of the reviews that are rounded up to help you better understand the product through genai and how to bring things together to make your life easier, then I actually think it is solving a problem. And the problem is it's information will overload. There's just so much stuff out there and it's really hard to parse through some of that information to make an educated decision. But I see where you're coming from. It is not going to cause as much chaos as we thought in the marketing world when it comes to image generation and taking people's jobs away.

Marcus Johnson (06:31):

Blake, it doesn't seem clear. I mean this point that Ezra Kle makes about, it's not really clear how to make it part of your life. That seems to be a big part of the problem. It kind of feels awkward like I have to go and seek it out to drag it into my life as opposed to it being like, oh yeah, this is where this fits.

Blake Droesch (06:46):

I think part of the reason why that is because it's not necessarily integrated into the tools that the average consumer uses on a daily basis. Great point. Once you start seeing generative AI chatbots or other functions on the homepage of Amazon more prominently in Google or

other search engines where it does exist to a certain extent now, I think that's going to lend to more widespread consumer adoption. And I'm talking about the way that consumers might use generative AI in their personal lives. Obviously if you have a job where you're in marketing or advertising or retail or many other industries where you're using it for work, I think the use cases are started already there and that's where a lot of this rhetoric around becoming prepared for and becoming acclimated with AI because it is going to be part of your job very soon. I agree with all of that, but I do think there is some credence to what Paul was saying about it does not serve a function that is necessarily ingrained in the natural flow of the way people conduct their personal business online just yet. And just one more point, I think AI is a victim of sort of the tech world hype train. So things got overblown very quickly on how quickly AI usage is in AI in general is going to scale up. That doesn't mean it's not going to be a big deal going forward, but I think it's still going to take longer for the average consumer to come around to using it in their everyday life than people in the tech world are

Suzy Davidkhanian (08:18):

Assuming Blake is clearly not Canadian. He fully threw me under the bus without a U-turn at all. No, I'm

Blake Droesch (08:25):

Joking. Sorry, I'm a New Yorker. I'll just talk for very long and not let anybody interrupt.

Suzy Davidkhanian (08:30):

Yeah, I'm just joking. But you know what I would say it's that stickiness factor that's critical, right? And no matter any kind of technology and if you don't make it easy and convenient, people aren't going to be using it. We have a colleague who is telling me that use chat GPT to say things like, and I guess it's just practice, right? And it's creating habits. They use it to do recipes. They try and figure out based on what's in their pantry and what's in their fridge based on some of the different nutritional hiccups that her family has, what can she make that's 30 minutes or less and then it goes and looks for recipes. I think if you understand what you're trying to achieve from the technology, then you will start to use it more and more and it's just maybe we're very efficient people and we don't eat it right? But if you think about QR codes do, nobody was using them even though they're like 15 years old until we had no choice. So it might be that too.

Marcus Johnson (09:19):

Yeah, that's the other argument, isn't it, that a lot of people don't know what to use technology for until much later, five, 10 years, 15 years later and then it becomes apparent as to what they should use it for. The point being get the technology into as many people's sounds as possible and they'll tell you how they want to use it. The one use case I could think of is for when you need to ask multiple questions at the same time. So for example, I was driving back from somewhere this past weekend and I wanted to stop off, but I didn't want to have to stop off somewhere for a coffee shop and then somewhere for a gas station and I didn't want to have to pull my phone out whilst I was driving. And so being able to speak to an AI and say, can you find me a coffee shop that's open next to a gas station within the next 15 minutes and that would just add them to your directions whilst you are not have to X out of that to go, that would be useful. And so those types of things, I think when it is directly inserted into the flow of your everyday life and helping you with certain tasks like that, that I could see

Suzy Davidkhanian (10:21):

Marcus that's already available on Google Maps. You can add pit stops. I mean you have to do it with your hand. You can't talk to it, but I bet you could because you couldn't talk to Google Home.

Marcus Johnson (10:31):

You can have pit stocks, but can you find a coffee shop that's open next to a gas station or find a specific type of coffee shop or a specific type of gas station if you're maybe a rewards member or whatever, something that makes it easy. You can do that stuff but it's very friction filled. I think even pulling out your phone and having to alright, find the option, add stop, then search the area. Those things can be quite difficult. So if it helps streamline some of those processes, that's what we've got time for. The story of the week. Let's move to the game of the week. Today's game, it's nearly brand new. It's the super-duper game.

Marcus Johnson (11:08):

How does it work? Great question. There are three rounds today. We have slice of pie, move the needle and the random scale. The better the answers, the more points you get. That's it. So round one is slice of pie, folks choose up to three reasons, up to doesn't have to be three why something is happening attributing shares to each. So if the question was who's most likely to derail this episode, I'd say 95% Susie, 4% Blake, and 1% Stuart who runs the team not

knowing how to work a timer when Victoria's out. Luckily v's. Here so everything's going smoothly.

Suzy Davidkhanian (11:41):

Paul didn't get anything.

Marcus Johnson (11:43):

No, Paul's always good. The streaming tides keep shifting is round one. By the end of Q1, Nielsen's gauge showed that close to 39% of all TV time, all of it is spent streaming things. 39% of all time cable was behind that with 28% broadcast had 22. YouTube now accounts for close to 10% of all TV time, not just streaming all time. You spend watching tv, 10% for YouTube. Netflix has eight, Hulu has three, a slice of pie. What's been the biggest story in video streaming in Q1 according to Nielsen's gauge, Susie

Suzy Davidkhanian (12:20):

Shoot, I think I did the exercise wrong. Oh

Marcus Johnson (12:22):

Jesus.

Suzy Davidkhanian (12:24):

I thought I was supposed to. I thought I was supposed to say streaming 30%. Whatever. I didn't know that I was supposed to say what's moves and needles? Why

Marcus Johnson (12:33):

Would you have to do streaming 30? But Nielsen's gauge does that for you.

Suzy Davidkhanian (12:37):

Well, I don't agree with their gauge. I thought that's what you wanted us to talk about. Oh

Marcus Johnson (12:41):

No, that gauge is really quite brilliant.

Suzy Davidkhanian (12:44):

Well, so I think, okay, fine. I can come up with it. It's totally fine. Can you ask the question one more time?

Marcus Johnson (12:50):

Okay. I told you no one prepares for this. We had a specific meeting, which we never do, just to go through how the game works,

Suzy Davidkhanian (12:59):

Didn't understand the pie components.

Marcus Johnson (13:02):

Okay,

Blake Droesch (13:03):

You mentioned pie and people just get distracted, they start thinking about pie. Paul

Marcus Johnson (13:07):

Started naming listening in the meeting. It got very weird. Okay, what's been the biggest story in video streaming in Q1? If you had to give a couple of stories and shares as to how big that story is?

Suzy Davidkhanian (13:21):

I have to go first.

Marcus Johnson (13:22):

Oh, Paul.

Paul Verna (13:25):

So I'm going to say that the off to a flying star, the momentum in streaming is about 50% of the pie. The aspect of YouTube and Netflix in particular, but also other SVOD streaming video on demand services, having a great share of the time spent. That is about 40% of the story. There's another aspect that Nielsen covered, which is that traditional TV had a very good January. That's a footnote, so I'm going to give that 10%. It's interesting, but ultimately it's kind of a fluke of NFL programming during that time. So 50 40, 10.

Marcus Johnson (14:05):

Very nice. Blake.

Blake Droesch (14:07):

I'm actually surprised that, and I would give this about 50% of the story here, that YouTube doesn't have more ground on Netflix. Just to think of the versatility of YouTube as a platform and the types of content it offers to all of these different types of audiences to have YouTube at 9.7% and then Netflix not too far behind it at 8.1% is interesting to me. The second story, which I would give about 25% to is about just about, again, Netflix significantly higher compared to its competitors. So Netflix at 8.1% and then the next largest SVOD platform is Hulu at 3% and Prime video at 2.8. I think when you just look at the way that content is spread out, Netflix doesn't really have a stronghold on what I would believe to be the consumer perception of what it once was. It's just the place that had the highest quality premium video content. I don't think that's the case anymore, but it still has a larger share than its competitors. And then the last story, another 25% is just seeing how small of a share of the pie some of these other streaming platforms have all below 2% Disney plus Peacock Max and Paramount Plus just for all of the hype around the launch of these platforms, they generate a lot of buzz, I think, in the cultural consciousness, but the fact that they still have less than 2% of the time is very, very surprising to me.

Marcus Johnson (15:43):

Yeah, you have to add up Hulu Prime video and Disney Plus together to even get close to Netflix by itself. So it's the good points.

Suzy Davidkhanian (15:53):

Are you ready? No, I'm ready. I think that's 50% of the story, how the presidential election and what's happening on school campuses is going to drive some different kind of viewership habits. I think that for me, there's a little bit of confusion, but YouTube doesn't create its own content. It shares other people's content and it does have live TV from what I understand, but it doesn't have its own proprietary content. So I think this idea around the momentum that Paul was talking about, which is what Blake is talking about as well in some ways creates 40% for content creation of streaming. So Netflix is of the world prime Disney that are Hulu, that are creating their own original content, 40%. And because obviously I have to talk about retail, I am shocked that the weather is a story for TV and that depending on good or bad

weather, TV viewership goes up or down and probably any kind of streaming service, I give that 10%.

Marcus Johnson (16:45):

Very nice. Yeah, live is stripped out of these numbers. So YouTube TV is stripped out and then Hulu with live TV is also stripped out. So this is just their YouTube main as they call it, or Hulu, SVOD. You mentioned broadcast, just looking at the numbers right now, really holding its own. The declining share is coming from cable to the benefit of streaming broadcast. Last February, 2023 was at 24%. February, 2024 is at 2320 4%. So that's really holding its own the broadcast portion, it's the cable portion that seems to be going down and down. I had a few things that jumped out to me. Hulu overtook Prime video from January to March of this year. So Hulu is now in third place in terms of time spent. Second thing, YouTube's gains. YouTube went from 9% of all TV watching to 10% of all TV watching, which doesn't seem like a lot, but in just two months.

Marcus Johnson (17:37):

So it gained one percentage point in just two months. And then the last thing here, the new big three, YouTube, Netflix, and Hulu, first, second, and third streamers make up nearly as much time spent with TV as broadcast close to those three players. YouTube, Netflix, and Hulu account for close to a quarter of all time spent watching tv. Very good folks. Let's move to, how are we doing? Paul's just out ahead, but he does cover the space more closely. So he's up with three, Blake and Susie with two a piece. Next story is round two is Move the Needle. Folks have to tell me how much this story will move the needle out of 10 is the next ad battleground. Apparently it's going to be the backseat of your New York City. Uber writes Patrick Coffee of the Wall Street Journal. He explains that the New York City Council ended a longstanding ban on ads inside ride hailing cars by passing a law that took effect in April. Handing marketers a new substantial and captive audience for their video pitches in the country's largest market. According to the city's taxi and limousine commission, folks ordered over 20 million rides just in February alone in New York City through apps like Uber and Lyft. So move the needle. We'll start with Blake. How significant of an ad battleground can the backseat of a cab be out of 10?

Blake Droesch (18:51):

So I would give it like a, I don't know, I'd give it maybe a six and a half out of 10,

Marcus Johnson (18:57):

6.5.

Blake Droesch (18:57):

So basically I think, look, it is the biggest market. It's a new form of advertising. Uber does have unique ways that they could leverage their customer data to have some sort of interesting targeting ad targeted ads, but it's not media. So there's no incentive for the passenger to watch the ad unless they're interested in something else that's going to be shown on the screen. So I think that's why the taxi cab TV stuff doesn't really work out that way. And every time I get in a cab, I don't see any ads. All I see is if you want to advertise on this space, scan this QR code. So that goes to Shelby that that's not super strong. So I think they're going to need to build out some sort of media ecosystem around it in order to get customers to engage in it or else they're just going to press that power button like everyone does when they get in the cab so they don't have to listen to Jimmy Fallon.

Marcus Johnson (19:54):

Yeah, it is easy to ignore. The law doesn't require drivers to install these things in the first place to video tablets if they don't want to. And then the screens have to include volume control or an off switch as well, Susie.

Suzy Davidkhanian (20:05):

So I agree with a lot of that, but I would've given it a five, not as high of a four. Now I think most of the time the jeopardy questions are kind of fun and that's just enough for me to get entertained, see a couple ads and move on with my life. But it is important to have context around the ads so that people are paying attention and not glazing over. But even then, I just don't know that this is going to work. It's not new, it's not innovative. It's not a place where people want to be disturbed when they're taking an Uber. The only hope I give it and that differentiates it from a cab is that like Blake said, they have a lot of data, both Lyft and Uber. So if they're able to target and have some sort of emergency urgent offer that you're going to take from the Uber so they can close the loop and they know where you're going and where you're coming from and they can give you a coupon to go to a restaurant and then they can prove that it's worth the ad, then I think it's going to wing.

Suzy Davidkhanian (20:58):

But there are a lot of ifs for that to happen. And so I just don't know

Marcus Johnson (21:01):

Paul,

Paul Verna (21:02):

So I'm going to say this is not a needle mover. I'm going to give it a one digital out of home ad spending is less than 1% of total media spending in the us. And if you think about this being just a small sliver of digital out of home ad spending, it's a small blip on the radar and it's an extremely annoying form of advertising. Most people don't like it. I think when people are in an Uber, they want to do other stuff and having something blaring at them. I know from my experience, I always shut it off. So I just don't think it's going to be a very effective medium. I also have to wonder, in the case of Uber, are they going to pay for the equipment or does the driver need to pay for the equipment?

Marcus Johnson (21:48):

So the Uber drivers might have, I don't know for sure, they might have to fork out for maybe the tablet initially. However, the law's primary goal apparently is to create a new source of passive income for rideshare drivers according to City Council Majority leader Amanda Faras. Since it requires companies that profit from the new ads to share at least 25% of the revenue with the drivers. So maybe that's the incentive. They say you have to fork out for it initially, but we will give you a cut of the money. I'm wondering whether would you click on with ads Uber option for a 20% cheaper ride

Paul Verna (22:23):

Knowing

Marcus Johnson (22:23):

How they have Uber X, Uber Green, Uber, whatever, black. Would you be like, okay, we will show you ads. You can't turn it off, you can't turn it down. It won't be blaring at you, but you get a 25, 30, 40% off your ride. Maybe that works.

Paul Verna (22:38):

Yeah.

Blake Droesch (22:39):

Yep. And you just take your jacket off, pop it right over that story.

Paul Verna (22:42):

Enjoy your ride. I have a feeling that the discount might be more on the order five to 10% than 25, 30. 40. Yeah, that's

Marcus Johnson (22:50):

Probably true. Alright, folks all tied up heading into the last rounds. It's round three. The random scale folks have to tell me about the chances of something happening using the random scale. We're talking about delivery expectations and how they're shape shifting. As of March, Walmart started offering early morning express delivery from close to 5,000 stores. Our senior retail analyst, Zach Stambaugh notes the service lets consumers place orders as early as 6:00 AM there will arrive at their doors within an hour. Zach points out that the launch of Early Morning Express comes about six months after Walmart began offering late night express delivery. A random scale though related to how fast people need things. That's the question, how fast do people need things? The scale from lowest to highest is first of all, there's no real rush. Then there's within the next few days, tomorrow's fine and yesterday, dammit. So that's the scale, Susie.

Suzy Davidkhanian (23:43):

So of course you're not going to love my answer. I think it depends, right? It depends on that category

Marcus Johnson (23:48):

That as soon as I come up with a question, I mute.

Suzy Davidkhanian (23:51):

I mean it's like, no, you're right though. You respond. It all depends on the category, right? But I would say probably the most important part when it comes to delivery is to make sure that it is very clear for your customer and to give them options to expedite, just pay more. If I need it right away in the next half hour, then I'll just pay more for it. The onus is on the customer and I think that'll just be so much better.

Marcus Johnson (24:12):

Blake,

Blake Droesch (24:12):

I would say tomorrow is fine. And that's because I do agree with Susie that it really depends on the product. I mean for personal care items, household goods, oftentimes it is yesterday, you need it as fast as possible. I think that in the delivery space, my slogan is always that customers don't want fast shipping. They want free shipping as fast as possible. So a lot of the times people are willing to wait a couple of extra days for their items as long as the shipping is free. But as Susie mentioned, you also want to include that option. You want the flexibility. So offering free ground shipping, an extra couple of bucks for next day as well as click and collect. These are all the types of fulfillment offerings that consumers want, different consumers want and the same consumer wants depending on what they're purchasing. So it's really all about flexibility when it comes to fulfillment. Cool.

Paul Verna (25:11):

So if I have to commit to one of the four categories, I'm going to say yesterday, dammit, because yeah, that's the whole point of the, we live in an instant gratification world, but I will join my colleagues in challenging the premise of the question and agreeing with them that it really is about control and flexibility. So for example, I love how Amazon gives you the option of putting things in fewer boxes and making a more efficient delivery if you're ordering a bunch of stuff. I think that speaks to people's concerns around sustainability and it's a positive. I also think that when you have to change a delivery option or when an item comes before it was promised and you might not be home, the ability to truly control that would be a big bonus. And that exists, but it never seems to work well. So just more refinement in the algorithms that allow you to customize the delivery. Okay,

Marcus Johnson (26:10):

Very nice. Let's count the scores. I don't need to count the scores. Blake won. Blake is this week's winner because of his, they don't want fast. They want free as fast as possible. Slogan. Who'd you take that from?

Blake Droesch (26:22):

That's a Blake Jewish original.

Paul Verna (26:24):

That's a good one. I will admit

Suzy Davidkhanian (26:25):

It is a good one. I thought you were letting him win because it's his birthday week.

Marcus Johnson (26:31):

Oh it is.

Blake Droesch (26:31):

Yes it is. Yes.

Marcus Johnson (26:33):

I had no idea. I try not to. Should we sing things like that? No, no. Yes. No. We have no time for that.

Suzy Davidkhanian (26:42):

He's good.

Marcus Johnson (26:43):

I will say on the final point, the idea that convenience doesn't equal delivery speed and the idea of people wanting control and options. There was a separate piece from Zach writing that merchants must put shoppers in control of the delivery process. For example, letting folks choose a specific day for a delivery, which was an option 64% of consumers wanted, which can help mitigate their top concern. He says, which is missing attempted deliveries when they're not home, which was cited by 54% of people. Congratulations to Blake. He won just eight points to Paul and Susie. Seven a piece. You get the championship belt. And the last word

Blake Droesch (27:24):

I got to say, I'm a little bit unprepared whenever I do the podcast with Paul, I always pay no credence to the idea that I could win. But I'll have to just say the Mets are a dumpster fire, but a slightly smaller dumpster fire than I think the fan base was anticipating. In fact, we even took two out of three from the Dodgers a couple of weeks ago, Marcus's team when we played

them away at Dodger Stadium. So I guess let's go Mets and try and keep it above water for as long as possible. Yeah, it's

Paul Verna (27:55):

Been more like a trash can fire, not a full dumpster.

Blake Droesch (27:58):

That's

Marcus Johnson (27:58):

Fair. That's what you guys are celebrating as Mets fans. We do.

Paul Verna (28:01):

We celebrate

Blake Droesch (28:02):

Slightly smaller

Paul Verna (28:03):

Trashcan fires. Yes we do.

Marcus Johnson (28:05):

What's the Dodgers record right now? Blake?

Blake Droesch (28:08):

Are the Dodgers still in first place? Yeah, we're in Fest. Yeah.

Marcus Johnson (28:11):

Yeah, we gave you a few games out of pity

Blake Droesch (28:14):

Game. Best team money come by.

Suzy Davidkhanian (28:16):

How come I'm not a concern, Blake, when you're on the weekly list, is it because Marcus never lets me win

Marcus Johnson (28:22):

Not

Blake Droesch (28:23):

Yeah, I think Susie, I think maybe you might be blacklisted against winning.

Marcus Johnson (28:28):

You're focusing too much on the plant behind you being in the shop as opposed to doing research for the

Suzy Davidkhanian (28:33):

Show. Thank you for helping with that. I was waiting for that. Thank you.

Marcus Johnson (28:37):

Let's crop that out. Alright folks, that's what we've got time for the game. Congratulations to Blake. He is the winner, not Susie 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. Let's start with Blake because he won.

Blake Droesch (29:05):

So I had a report come out last

Marcus Johnson (29:09):

Week. Oh my god, this is not that time. Re

Blake Droesch (29:11):

Okay, digitization.

Marcus Johnson (29:13):

This

Blake Droesch (29:13):

Is fun data though. It happens to, it would be a big miss for me to talk about coincidence restaurant data without plugging my report. So we allow it. It's funny that you think I'm so prepared for these podcasts that I specifically found restaurant data so I could plug my report. That is by no means what happened. I looked up, I went to the first website I always go to for dinner party data and found this two minutes we started recording u gov. Just happened to be, yeah, so this is some data from u gov here. We gov, they pulled Americans. I do like u gov. I think they always have the most interesting survey. It really is. It's a great firm. Which restaurant customer behavior do Americans think are acceptable and unacceptable? And in typical Yu go fashion, there's a long list that I cannot, I'm not going to read off. So I'll give you the most unacceptable behavior that a customer does. So it's not just their interaction with the staff, it's also like socially too. So chewing

Suzy Davidkhanian (30:17):

With you mouth

Blake Droesch (30:17):

Open. So 90% said it was unacceptable to say they won't pay for a dish they didn't like, but they ate it. Some of the other most unacceptable behaviors were allowing children to roam freely. Debating menu, menu prices with the staff kids, weird. Stop staying past the restaurants, closing time, it's understandable. And then also snap their fingers to get the waiter's attention. Terrible. That's

Paul Verna (30:43):

Really tough. Terrible. I always have my butler do it. I would never do that myself.

Blake Droesch (30:47):

No, exactly.

Marcus Johnson (30:49):

Debating prices with the staff is pretty boiler. Be like, I'll give you 15 for it tops. Fourth 16 is my final offer. Everything's

Paul Verna (30:57):

Negotiation

Marcus Johnson (30:58):

Is a stake. Sir. Susie, you're up.

Suzy Davidkhanian (31:01):

So today is national write a review day and we know that reviews help with conversion. 76% of consumers express that they trust reviews and 91% of consumers say they read them before they make a purchase. So it's really important to maintain trust with your consumer by having really good, credible, not bought reviews. 50% of consumers tend to show greater interest in a business if they respond to the review and they feel like it's a better sort of interaction and the business cares for them. And the last piece I will leave you, which should not be a surprise, which is probably why Amazon is using Genai for reviews and trying to sum them up. 65% of consumers use Amazon for online Latin news.

Marcus Johnson (31:51):

Very

Suzy Davidkhanian (31:51):

Nice. Write a review. It's really important, especially for small businesses and restaurants

Marcus Johnson (31:56):

Or small podcasts. Thank you to everyone who has reviewed this podcast. Pull you up.

Paul Verna (32:01):

So what is the windiest city in the us?

Suzy Davidkhanian (32:05):

It's not Chicago.

Paul Verna (32:07):

Chicago's not even in the top 10.

Blake Droesch (32:11):

That's because it's not the windy city because of the wind,

Paul Verna (32:13):

Right? Right. So the Windies city in the US is Amarillo, Texas.

Marcus Johnson (32:20):

I was going to guess somewhere in Montana.

Paul Verna (32:22):

Oh, sorry. I should have let you guys guess first.

Marcus Johnson (32:24):

No, it's fine, it's fine.

Paul Verna (32:25):

Fine. Rochester, Minnesota, number two. Lubbock, Texas, number three. Corpus Christi, Texas number four, and Wichita, Kansas. Number five. This got me thinking though, and by the way, all of this started because Apple has made the weather app a lot more sophisticated in the last couple of iterations. But this got me thinking what are the least windy cities in the US? And there's actually a three-way tie, but they're all in one state. So anyone want to guess the state don't all shout at once.

Suzy Davidkhanian (32:58):

It must be in the middle of the country where there's no lakes.

Blake Droesch (33:04):

Does it count when there's a hurricane?

Paul Verna (33:07):

Well, that's a complicated question. Hurricanes do count, but ironically tornadoes don't because Georgia, let me just finish because tornadoes, sorry. Tornadoes typically destroy the measurement data, so it's harder to measure the actual wind speed of tornadoes. So they factor that out of these averages. But so Marcus, you said Georgia

Marcus Johnson (33:33):

Only if it's correct

Paul Verna (33:34):

And then

Marcus Johnson (33:34):

We'll cut out otherwise.

Paul Verna (33:36):

And then Blake, you I'm going

Blake Droesch (33:37):

To say Alabama.

Paul Verna (33:38):

Okay. And Susie, you said it would be around the middle of the country. Yeah, you're all wrong. Midwest. You're all wrong. Southwest Arizona.

Marcus Johnson (33:46):

Arizona.

Suzy Davidkhanian (33:48):

I mean it is so dry there.

Paul Verna (33:49):

Yeah. Catalina Foothills, Tucson and Casa. Adobes or CASA's. Adobes are the three cities with an average wind speed of 1.1 miles per hour.

Marcus Johnson (34:00):

All right, let's do a clean take so I can cut this in Arizona.

Suzy Davidkhanian (34:04):

Perfect. Nice try. All right,

Marcus Johnson (34:06):

Thanks

Paul Verna (34:06):

Lance. Yeah, you win. Marcus,

Marcus Johnson (34:08):

I got one for you real quick. The most popular American household pets, according to the American Pet Products Association in a recent visual capitalist article by Marcus Liu. He writes that guess, well, you probably know what it is, fish. Guess how many people the most popular? No, it's not fish. It is of course

Suzy Davidkhanian (34:31):

Dots.

Marcus Johnson (34:32):

There we go. But what share of American households have a dog?

Blake Droesch (34:35):

21

Suzy Davidkhanian (34:36):

And

Paul Verna (34:36):

2, 40, 50, 20, 41

Marcus Johnson (34:40):

And two is exactly 50%. Yeah, 65 million households own a dog. 50% of all US households, it's cats. This is too high. This one. 37% of all households owning those, especially considering that, is it 96% of a cat's? DNA is lion. What did Minda say? It was something like that. Basically cats are lions is what she would say. Now I walked past the cat yesterday and crossed the street because I was like, I'll look at you differently now. Wait,

Suzy Davidkhanian (35:14):

There was a cat on the street where you were?

Paul Verna (35:17):

No, Marcus looked at a cat inside a house and then he went outside to cross the street.

Marcus Johnson (35:22):

You've never seen a cat outside. What

Suzy Davidkhanian (35:25):

Are we doing? Not in the us.

Blake Droesch (35:27):

I've never seen a stray cat

Suzy Davidkhanian (35:29):

Or just New York.

Marcus Johnson (35:31):

That's just outside.

Suzy Davidkhanian (35:33):

Yeah, no,

Blake Droesch (35:34):

I mean not like in Manhattan. You're not likely to see one. Maybe a bodega cat, but in the suburbs. Yeah.

Suzy Davidkhanian (35:42):

All right. No, I've never seen that before. I've seen it in Greece. That

Marcus Johnson (35:45):

Everywhere. You said polar bear. Alright.

Suzy Davidkhanian (35:46):

Yeah,

Marcus Johnson (35:47):

Fair enough. Count a second. 37%, 8% have fresh water fish. Just over 5% have small animals, rabbits, hamsters, Guinea pigs. And just under 5% have birds and reptiles. 1.5% have horses and 1.5% have salt. Water fish.

Paul Verna (36:05):

I assume that my last pet doesn't even figure into the ranking at all. Eels,

Marcus Johnson (36:11):

What did you have last? Eel. Did you really have an eel?

Paul Verna (36:15):

I did, I did.

Marcus Johnson (36:16):

Did your kids make you?

Paul Verna (36:17):

What was your choice? My brother worked in a restaurant where they cooked little elves, little tiny

Suzy Davidkhanian (36:22):

Eels come on.

Paul Verna (36:23):

And there was one that was different. Oh, I feel

Suzy Davidkhanian (36:25):

I've heard this

Paul Verna (36:26):

Story. So it was actually a of discrimination. So he brought it to my, he had the key to my apartment. Oh, I do remember this. Yes. He brought it to my apartment, put it in a bowl and said, here's Herman, take care of him. And I did. And Herman grew up a lot.

Suzy Davidkhanian (36:41):

Have you seen a stray cat in your neighborhood? I mean, you're the one that lives in a house compared to all of us here. Do you sees cats? Cats

Marcus Johnson (36:49):

Outside over time

Suzy Davidkhanian (36:50):

Roaming around your neighborhood?

Marcus Johnson (36:52):

They don't have to be stray to be honest. They go through a cat, outdoor cats. The back of your house? Yeah. And then they come

Suzy Davidkhanian (36:57):

Back in. I mean my parents did a job to stray Cat 20 years ago in Canada.

Paul Verna (37:03):

So we had stray cats in my neighborhood in the suburbs and they were actually kind of circling our property. Which stray? Well these were stray, but I agree. I do agree that yes, we do see cats, like real cats that are not stray cats. I

Suzy Davidkhanian (37:18):

Forgot

Marcus Johnson (37:19):

About it off running if she sees a cat

Suzy Davidkhanian (37:21):

Outside. I did. I forgot that my parents adopted a stray cat. They even got him a cage aimed him in everything. Got him food because he think he was being attacked by weapons.

Marcus Johnson (37:32):

Good god. You said that it was very pointed like he owed them money.

Suzy Davidkhanian (37:36):

No, I stop

Marcus Johnson (37:37):

That. Two more things for you dog owners will understand this Forbes advisor analysis found the essential dog expenses cost an average of $1,500 annually. That's too much.

Suzy Davidkhanian (37:50):

I thought it would be

Marcus Johnson (37:50):

So much. And Forbes found that

Paul Verna (37:52):

66. I thought you were going to say 1500 a month.

Suzy Davidkhanian (37:54):

Yeah,

Marcus Johnson (37:55):

No, Forbes found. It depends. If something happens to the dog and you've got to take it to the vet, then that can shoot up quite probably doubles very quickly. Forbes found that 66% of all American households own at least one pet as up 10 points from 19 88, 56 and one third of US households own multiple. My in England. My mom is responsible for at least half of the dog ownership in the country.

Suzy Davidkhanian (38:23):

We have four.

Marcus Johnson (38:24):

I'd say there's too many, but it's not enough. That's what we've got time for this episode. Thank you so much to my guests, thank you to Paul.

Paul Verna (38:31):

Thank you.

Marcus Johnson (38:32):

Thank you to Susie.

Suzy Davidkhanian (38:34):

Thanks for having me.

Marcus Johnson (38:35):

And thank you to Blake.

Suzy Davidkhanian (38:36):

Always a pleasure.

Marcus Johnson (38:37):

And thank you to Victoria who edits the show. And Stuart, who runs the team, Sophie does our social media. Lance, who runs our video podcast. Thanks to everyone for listening in. We hope to see you on Monday for the Behind the Numbers Daily and eMarket podcast made possible by Walmart Connect, happiest of weekends.

Suzy Davidkhanian (38:56):

Guys, should I click on a thing called Zuma's Blog or no Zus Blog? Does that sound like it could be a hack in the baking?

Marcus Johnson (39:08):

Yeah, you've got to stop with the IT questions. Okay.

Suzy Davidkhanian (39:12):

Want to be safe? Safety first.

Marcus Johnson (39:15):

What have you been doing on the internet that you're getting all this stuff on your machine? Get a Mac for the love of

Suzy Davidkhanian (39:20):

God. No. Hard. Oh, well I think I found one. Trust Pulse. I mean, it's in the name. Trust Pulse.

Paul Verna (39:28):

Yeah, if it says trust, you can definitely trust it. Rule of thumb, if somebody says Trust me, go for it.

Suzy Davidkhanian (39:37):

I better click on the zoo link. Oh

Marcus Johnson (39:39):

God.