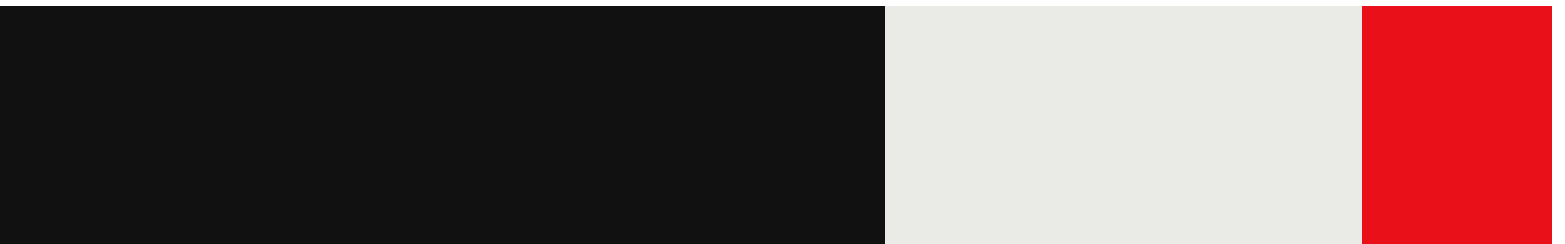


# The Weekly Listen: The (non-AI) standout tech at CES 2024, the largest TV audiences, and shopping with a chatbot

Audio



On today's podcast episode, we discuss what non-AI technology took the spotlight at this year's Consumer Electronics Show (CES), second-tier TV audiences, what streaming will look like in a few years, what its like to shop with a chatbot, how digital grocery will take things up a notch, how big the sun actually is, and more. Tune in to the discussion with our forecasting writer Ethan Cramer-Flood, analyst Bill Fisher, and forecasting analyst Zach Goldner.

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Episode Transcript:

Marcus Johnson:

Hello everyone, and thanks for hanging out with us for the Behind the Numbers Weekly Listen an e-Marketer podcast. This is the show that is not comfortable with negative 16 Fahrenheit.

Zach, was it really that low or can you not read temperature?

Zach Goldner:

I can confirm. I got receipts. It's chilly out there.

Marcus Johnson:

If I had to experience that, I'd move.

Zach Goldner:

Tomorrow the high is going to be 40 degrees, and we're going to be chilling and...

Marcus Johnson:

It's still cold.

Zach Goldner:

And no pun intended with the chilling. Don't you worry, Marcus, we're not starting off the show with a pun.

Marcus Johnson:

Okay. Yeah, so we're off to a hideous start. I'm your host, Marcus Johnson. In today's show, what stole the show at CES that wasn't AI related?

Bill Fisher:

Past 15 years or more even the tech landscape has got messier and messier, and I thought there were some really cool announcements that were aiming to make things a bit easier for consumers.

Marcus Johnson:

What to make of second tier TV audiences.

Zach Goldner:

It's not just sporting events that they need to advertise to. Not when 93 out of a hundred of the best rated audiences are coming from sporting, you're missing a whole nother subset of the population.

Marcus Johnson:

What will streaming look like in 2027?

Ethan Cramer-Flood:

Some of these platforms are just not going to exist or not going to exist as they currently exist. There's either going to be mergers or acquisitions or failures.

Marcus Johnson:

How soon will we be shopping with AI chatbots? What digital grocery needs to take it up a gear, and just how big is the sun? Join me for this episode. We have three people let's meet. And we start with our principal analyst covering everything UK based on the south coast of England. It's Bill Fisher.

Bill Fisher:

Hello Marcus. Hello everyone.

Marcus Johnson:

There he is, also the host of our Around the World Podcast. We're also joined by one of our senior forecasting analysts based in Colorado for some reason, Zach Goldner.

Zach Goldner:

Hey, it's nice out here. Hey Marcus. Hello listeners.

Marcus Johnson:

Hello. Hello. Beautiful state, but not the place to be right now. We're also joined by Principal Forecasting writer based in New York City is Ethan Cramer-Flood.

Ethan Cramer-Flood:

Happy New Year.

Marcus Johnson:

No.

Ethan Cramer-Flood:

Can I say that?

Zach Goldner:

How long can we keep saying Happy New Year, Ethan? How long?

Ethan Cramer-Flood:

Am I that guy? No, I'm that guy. I'm doing it. I haven't seen you guys.

Zach Goldner:

You have a week. You can't go anymore.

Ethan Cramer-Flood:

No, this is my first podcast 2024 I reserve the right.

Marcus Johnson:

Is that the rule?

Ethan Cramer-Flood:

To tell everyone Happy New Year as I see fit.

Marcus Johnson:

I feel like January is the answer. But as we get closer towards the end of January, it's more and more acceptable for if you say that to someone for them to push you over.

Ethan Cramer-Flood:

Well, I got it out of my system, so we're fine.

Marcus Johnson:

Yeah. Bill, too late?

Bill Fisher:

I haven't seen Ethan this year, so I'm more than happy.

Ethan Cramer-Flood:

Exactly.

Marcus Johnson:

Don't you start too, Bill.

Bill Fisher:

Merry Christmas.

Zach Goldner:

Happy New Year, for crying out loud.

Marcus Johnson:

Oh my goodness. We can't do that.

Ethan Cramer-Flood:

Let's push it.

Marcus Johnson:

We're off to a hideous start. Okay. We've got the story of the week for you. We'll start there. We'll talk about CES. What were some of the main stories coming out of there that weren't AI focused? We then moved to the game of the week. What's the point? Our contestants will try to win pretend points to win Pretend belts. And we end with dinner party data, which is our random trivia segment, but we of course start with the story of the week.

What stole the show at CES that wasn't AI related? The Consumer Electronic Show, CES in Las Vegas just finished. You'll be shocked to learn that AI took center stage. As Mark Wilson of Tech Radar writes, Chat GPT was being shoehorned into absolutely everything. But we want to focus on what was the most interesting announcement to come out of CES that wasn't AI related. Ethan, I'll start with you.

Ethan Cramer-Flood:

Yeah, this is not a hard assignment because the AI related announcements that came out of CES were not interesting anyway, at least from my perspective. So you didn't have to phrase the question this way. And all the AI stuff is exactly the same thing we've been hearing all year anyway, which is just like there's going to be AI in there without any sort of clear value

proposition or what functionality it's going to provide that we don't already have. There was a bunch of cool stuff, bunch of cool stuff. You sent us some reading material. I was really into this Aura Cast technology.

Marcus Johnson:

Yes, that's the one.

Ethan Cramer-Flood:

A-U-R-A Aura Cast. Yeah. All right. Yeah, yeah, we're on the same page. That sounded super cool. For those who don't know, it's a new functionality, a new tech that will enable all of us to use our headphones or earbuds out in public more effectively in ways that we can't now use them. And the examples that they used were tuning in to a specific device somewhere, wherever you are out in public. If you are at a loud sports bar and you want to be able to hear the TV that you can't hear, or if you're in the airport and you want to tune into a specific announcement, but not other announcements and a whole range of other use cases.

Now is this really going to happen? I don't know. Is it likely that manufacturers are going to actually start installing all this so that we can actually have compatibility? Who knows? Maybe not, but man, that was a great vision. I mean, I could see applications for that even in my own home where even with your own smart TV where maybe someone's asleep in the next room because you have different sleep schedules, and you want to be able to have your earphones seamlessly receive sound from all your various devices. And then you just keep them in when you're out and about in the world. That was the answer for me.

Marcus Johnson:

Yeah, pretty cool technology. You could also, one of the use cases broadcasting to several different devices at the same time. So you could let a colleague or a friend or whoever share the audio from your laptop quite quickly. Also, those folks with hearing aids could more easily tune into a public speaking event as well, which is pretty cool. My concern though is that people already wear headphones too much, especially people who are supposed to be working. And by working, I mean serving you at a restaurant and they've got headphones in. And you're trying to order a burrito, but they're not listening. So I like the idea of this technology, but the idea of people wearing headphones more because now there's all this compatibility and functionality that they didn't have before, I think is terrifying.



Zach Goldner:

Marcus, you're hitting on your target audience. Those waiters and waitresses that have their earbud in, what if they're listening to Behind the Numbers? Don't knock them.

Ethan Cramer-Flood:

That's right.

Marcus Johnson:

They're not. They don't recognize me. I can see it in the face.

Ethan Cramer-Flood:

They're probably listening to us. We need a culture of having one earbud in and one out so that you can monitor whatever you monitor or if you're listening to music or whatever, that's fine and have one out. I don't know why we can't get to that point.

Marcus Johnson:

I would never vote for you as president. That sounds like a terrible... That's the problem. If you've got one in you don't know. Are they listening? Do they really care?

Zach Goldner:

You're partially listening. Come on now. We all give half our effort, every part of our all eyes, one on conversation.

Ethan Cramer-Flood:

That's the spirit. They only partially care what you're saying, Marcus.

Marcus Johnson:

Good. Okay, perfect. A prop to reinforce what I already assumed. Bill, what was the most interesting thing for you that was non-AI related at CES?

Bill Fisher:

Mine wasn't one thing. It was a number of announcements around one theme, and that theme was interoperability. So I don't know, the past 15 years or more even, the tech landscape has got messier and messier. And I thought there were some really cool announcements that were

aiming to make things a bit easier for consumers. So a few examples, LG announced its TVs would be shipping with Chromecast built in, so that's a dongle you don't have to worry about. Similarly, Amazon announced it's pushing ahead with its adoption of the Matter casting protocol. The aim there is to enable video casting from all devices. Slightly different bent, the Home Connectivity Alliance launched a new energy management interface specification that aims to make it easier for people to connect their devices and plug them into the energy saving Smart grid. And Qi2, that's the open wireless charging standard got a lot of support of the show, so we might in the very near future be able to charge all our smartphones using the same equipment. I'll believe it when I see it.

Marcus Johnson:

Yeah. Was there a specific element of interoperability that grabbed your eye the most? Like you said, a lot of announcements, but is there something you're paying particular attention to or looking forward to the most with regards to this world?

Bill Fisher:

It's just making everything easier, right? I mean, so, okay, a real case in point. Explaining stuff to my parents. I don't want to have to explain stuff to them. I want them to just be able to press a button, and it works. It streams where it wants to stream, and I don't have to explain it.

Marcus Johnson:

Yeah. I also liked the smart home is starting to blend or make technology that is more seamlessly integrated into the home. And I think that speaks to interoperability, which is making things seamless, making things easy, making things to more likely to blend in with the general flows of our daily routines.

Bill Fisher:

Transparent TVs was another thing.

Zach Goldner:

That was already really the new invention that no one ever asked for.

Marcus Johnson:

Why do I need to see behind the TV?

Ethan Cramer-Flood:

Oh no, I disagree. I thought those were great.

Marcus Johnson:

Oh gosh.

Ethan Cramer-Flood:

I mean, I'm not going to spend \$10,000 on one of those things, but I love the idea of them making our devices less noticeable. Whatever it takes. It's part of the blending conversation that Marcus just had. I mean, you get this thing, this giant humongous black box that just sits on my wall. If that could look nicer while I'm not using it, I'm all in on that.

Zach Goldner:

I'll tell you this, Ethan. With the TVs, I understand how more technology is turning into the ambient pictures where you can have a picture frame pretty much on your wall as a TV, so it turns maybe to a nice flower. But the transparent TV, you're just looking what's behind the TV. And what are you going to have behind the TV? Your white wall?

Ethan Cramer-Flood:

Well, I'm working on that.

Marcus Johnson:

I prefer to have, maybe there's some news that pops up. Maybe you can see some of your notifications. Using that real estate for other things, the weather perhaps I think could be quite cool. Maybe it's telling you your calendar, it's telling you what your next event is, giving you an alert when that's coming up. So yeah, I thought that the transparent TV is a shocking idea, but there is I think something there in terms of using the TV real estate for other things. Zach, how about you?

Zach Goldner:

There's one piece of technology I found to be really cool. I don't know about you city folk, but parallel parking for me is not easy. But with the new Hyundai Ioniq five, it has the ability to crab walk, so to crab walk into a parallel spot. So what its technology allows the car's wheels to do is to have all four wheels turn 90 degrees to allow it to have lateral movement to

simplify the parallel park. So it's able to drive diagonally, which I don't know why you'd do that. It can turn 180 degrees without moving a centimeter so all these really interesting technologies. And yes, that's meant for the Hyundai Ioniq five, but that technology might go over to be licensed to other electric cars too, to really simplify the process of parallel parking. So I think that'll be really fascinating to watch.

Marcus Johnson:

You know what it's meant for? It's meant for Americans. Bill, I don't know what's wrong with them. They can't parallel park. No offense America, but you're rubbish.

Ethan Cramer-Flood:

I don't need that. I can parallel park. That's a cool idea though, because other people that spend 20 minutes embarrassing themselves on the side of the road, just get it over with.

Marcus Johnson:

Yeah. I guess it's going to be helpful. If this was a game, you would've lost. Okay, Zach, I don't know who would've won, but you definitely would've lost this.

Zach Goldner:

Whoa, whoa. I'm not done. I can go on with more cars.

Marcus Johnson:

Oh, there's more? No, no, no, no, you're done. You're cut off. What I was hoping for was 5G laptops so I can work from a national park. Why haven't laptops got 5G yet? Maybe they do. Maybe I just don't know they exist, but that's what I'm waiting for. That's a real game changer.

Zach Goldner:

What is a Elon Musk's project?

Marcus Johnson:

Starlink.

Zach Goldner:

You could use Starlink and work from any national park you'd like. Helping your issue right here.

Marcus Johnson:

Thanks, Elon. All right folks, that's all we've got time 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 our contestants, Zach, Ethan, and Bill, tell us the main takeaway of the story. Okay answers get one point, good answers get two, and answers that leave you with the same feeling as when a song you like on the radio ends perfectly as you're arriving at your destination and it feels like they played it just for you. Answers that leave you with that, no one, okay, nothing. Why are you looking up, gentlemen? Have you not experienced that before? Okay, good. Moving on. Crickets.

Answers leave you with a better feeling than that get you three points. 20 seconds to answer. I must wish you good luck gents. Round one, we start with Ethan. Second tier TV audiences, the Golden Globe motion picture and TV awards drew 9.4 million viewers. It's a lot better than last year, but still about half as many as pre-pandemic audience totals. Writes John Koblin of the New York Times, the TV industry's Emmys just recorded their lowest viewership numbers ever with 4.3 million according to preliminary Nielsen data. They're assuming that those numbers might go up a bit, but the previous low was five point something, so they probably will still be a record low. But Ethan, what should we make of second tier linear TV audiences? And by second tier, first tier, I'm thinking of Super Bowl style audiences, which can rack up a hundred million people.

Ethan Cramer-Flood:

What we should make of this is that they so rarely have any kind of good news that this is what qualifies as a positive story, even though it really wasn't. I mean, okay, thank you, Golden Globes. You had more viewers this year than last year. That's not saying much that the catastrophic decline that it had after the series of scandals getting up to 9 million of it. I mean, that's a big number. That's a nice number, but it's half what it used to be. And given that the Emmys are still declining, we'll see what happens with the Academy Awards, but these numbers are just, I don't think this changes the long-term trend.

Marcus Johnson:

Zach?

Zach Goldner:

Well, truce on Golden Globes, this is the first time I've heard that award show mentioned in years. But I just want to mention ad space TV isn't just a Super Bowl party, but is a year round Fiesta. I think it's important for advertisers to notice that it's not just sporting events that they need to advertise to. Not when 93 out of 100 of the best rated audiences are coming from sporting, you're missing a whole nother subset of the population. So I think it's really important for advertisers to not be a one trick pony, to advertise on more diverse content, and mix things up just beyond traditional sports. And I don't want to put too much attention on award shows because yes, that trend has been going down, but advertise on places that your traditional sports fan won't be on, both on traditional TV and on social. So I think it's very important to diversify your advertising portfolio.

Marcus Johnson:

I want to hammer home that point you just said because yeah, football is accounting for a higher share of linear viewership. So the NFL, as Zach was saying, making up 93 of the 100 most watched linear broadcast in 2023, according to Sportico, it was 82 of the 100 in 2022, and 72 of the 100 two years before that. So that share is increasing. Bill?

Bill Fisher:

I'm with Zach on this. Not amazing numbers, but not bad. I want to take a UK example as well for this kind of event viewing that isn't sport viewing. So we had a reboot of a 1990 show right at the start of this year, Gladiators. I tuned in. It was an event every Saturday evening, 14 million other people tuned in with me. They rebooted it the other weekend. It had half as many viewers, six and a half million, but easily outperformed any other broadcast at that time, and it's still a good number of people. As Zach says, it's an audience of six and a half million people. As an advertiser, I'd want to be in front of those. So I think these second tier audiences are still important.

Marcus Johnson:

Yeah, 14 million people, especially in the UK, Bill, is decent. That's about close to 20% of the population, so it's a significant amount of folks. It's basically like an American Ninja Warrior style show where you are competing head-to-head against someone else who's also trying to do the same obstacle course as you. And there're also gladiators who tried to stop you as you're going.

Ethan Cramer-Flood:

Oh, American Gladiator from the nineties or even before.

Marcus Johnson:

Yeah. Oh, you have the similar thing.

Ethan Cramer-Flood:

I have a vague memory of that. Yeah, yeah, yeah.

Marcus Johnson:

There it is. The other thing real quick, the Globes, Daniel Constantine writes for our briefings were saying the Globes had a large lead in audience this year since the NFL game between the Chiefs and the Chargers was broadcast on the same channel right before it came on. So that might have also helped give it some lift. Let's move to round two, gents. What will streaming look like in 2027? According to forecasts made by digital TV research in 2022, by 2027, Amazon Prime Video will be the most popular platform and by a wide margin. As visual capitalist reports, the forecast expects Prime Video subscribers to reach 102 million surpassing Netflix with 69 million and Hulu with 59 million. Paramount plus would be fourth with 52 million, and in joint fifth would be Disney Plus and HBO Max with 51 each. But fast-forward to 2027, what would have been the biggest surprise in video streaming, Zach?

Zach Goldner:

Yeah. Well first of all, we have our own projections here. I am the one that worked on our own video forecast numbers, so none of this is a surprise to me. But we do look at viewers instead of subscribers for our own e-marketer forecast. But yeah, here the biggest takeaway I have is that there are six companies on that list with over 50 million subscribers. There's an oligarchy of entertainment here. And then if you look lower down on the list, the laggards are much further behind. I want to take two quick takeaways. One of them, Paramount Plus was much higher than I really could have expected. I'm not too aware of the value add that Paramount Plus does deliver. And then with Amazon really surpassing Netflix, that was another big one of mine. Amazon's been spending a lot of money on content, a lot of money on that Lord of the Rings show that people don't like to watch. And I'm shocked that it's really surpassed up Netflix.

Marcus Johnson:

Good answer, but you ran long. Negative two for Zach.

Zach Goldner:

That's a shame.

Marcus Johnson:

Bill, you're up.

Bill Fisher:

Yeah, I'm taking a slightly different view to this. I think the biggest surprise is it might look a lot like traditional linear TV, so looking beyond just these SVOD platforms, you've got to consider fast as well. Free ad supporting streaming TV, we project that there'll be 150 million fast viewers in the US in 2027. These channels carry ads. You've got the ad tiers on the SVOD platforms of course. You've got sports rights being sold to these players. I know we've spoken about bundling in previous shows too. So I just think in 2027, streaming TV might look a lot like just TV 2.0.

Marcus Johnson:

Ethan?

Ethan Cramer-Flood:

Yeah, I'll even piggyback on that because by the time you're talking about 2027, I think things are going to look really different. So these linear projections straight out into the future I don't think are very helpful because some of these platforms are just not going to exist or not going to exist as they currently exist. There's either going to be mergers or acquisitions or failures, and I'm waiting around for Disney to really shake everything up with the bundle. I expect the Disney Plus, Hulu, ESPN Mega Bundle at a considerably higher price point to shift the landscape of what we're used to because it will provide a genuine replacement for your entire cable package, that it will be able to provide something for the entire household with your shows and your sports and your kids' stuff and your nerd content.

And they'll be able to offer this mega thing, and they'll be up there with Netflix and I guess Amazon Prime. Amazon Prime, Zach is right to credit us. Marcus, you should be using our



numbers because the viewership is more important than subscriptions. They've got Amazon way out in front here because most households in the US are Amazon Prime households, and so you just get this service. But far more people watch Netflix, and we've got Hulu and Disney plus pretty close to Amazon also.

Zach Goldner:

In terms of Disney, just wait until ESPN has its standalone broadcasting channel that can go out to everyone in the US. It's going to have huge audience numbers when it does come out.

Marcus Johnson:

Negative points for Ethan. You went horribly long and not just because you came after me for not using our numbers. That was actually a good point. Real quick for me, I was surprised to see streaming TV cable's replacement will still be very, very small in the future. They had numbers from YouTube TV and Sling TV, basically cable streaming, YouTube TV and Sling TV expected to have 7 million and 3 million subscribers respectively by 2027. And we have numbers on those. We expect 21 million YouTube TV viewers, viewers that is by then and just 5 million viewers for Sling. So still very low numbers considering that it's three years out. Let's move to round three, and we start with Bill for shopping with AI chatbots. Yuan Lou of the New York Times notes that she recently turned to Shopify's new shop AI chatbot to help her holiday shop. And she was saying, she asked the chatbot. Said I'm looking for an office Christmas present for my mother and who works long hours.

And the chatbot replied, does your mother have any specific preferences or needs for her office, organization, tools, desk accessories, things like that. After a 10 minute Q and A back and forth in which Ms. Lu explained how much she had to spend and how her mother has back problem, shop AI suggested a new office chair, asking for design and color preferences as well. Ms. Lu says more people may eventually replicate this kind of shopping experience. In addition to Shopify, new chatbots have come out from Instacart, Mercari cart four with Walmart, MasterCard, and others testing chatbots. But Bill, how soon will we be using chatbots to shop?

Bill Fisher:

I think there's an inevitability about it. I say that because we have some proprietary survey data on this in the UK. We did a survey in partnership with Toluna. We asked the UK adults how interested they are in using AI chatbots while shopping so exactly this. 40% said they had no

interest at all in it, but 25% said they'd already used it. And 60% either had used it or had some interest in it so really high numbers. And as usual, the lower down the age ranges you go, the more interest there is. So a third of 18 to 34 year olds had already used the technology. So there's an inevitability about it. As I said, I think the focus right now is on the retailers to get the most out of the interest in this and build the right application.

Marcus Johnson:

Ethan?

Ethan Cramer-Flood:

Yeah, I mean is the question, how soon are we going to be using chatbots or how soon am I going to be using chatbots? Because for me, it's not going to happen at all. This doesn't even sound remotely appealing. In fact, it sounded incredibly time-consuming. Even the story when the author was trying to make it sound positive, like a successful undertaking, it still seemed just incredibly slow and really annoying. There's two kinds of people in the world. There's the people who walk into a store and immediately approach a salesperson and ask for help and want to have a lot of conversations. And then there's the vast majority of people that don't do that, right?

I wouldn't want to use these chatbots even if there was a human being behind it. None of this sounds remotely convenient at all, but they're coming. They're already here. It's going to be super soon. They're going to be everywhere. Get used to it. It will be an option. It probably already is an option for a lot of these. And yeah, it's going to be a part of life, but a lot of people aren't going to use it.

Marcus Johnson:

Zach?

Zach Goldner:

Well, Ethan, I'll tell you what, I'm one of those shoppers that'll ask a sales associate what they recommend, things like that.

Marcus Johnson:

Of course you are.

Zach Goldner:

So maybe I'm the prime example, but I asked the question, am I a good shopper? If you ask my mom, she would say no. Especially come the holidays when I get her a gift, and she'd give me the fake smile. Sorry, mom, if you're watching this, I know you don't like my gifts.

Marcus Johnson:

Hi, Mrs. Goldner.

Zach Goldner:

So I'm not a good gift giver. I'm not even good really shopping online for myself. But when I think about this chatbot, I think it could really help out with time savings and really coming up with something that I'd be interested in getting. For me, when I'm shopping online, I like using a filtering tool. And sometimes using a filtering tool can be really time-consuming. So with AI chatbot, my hope is that I could be able to narrow down what I'm looking for in a less time-consuming way.

Marcus Johnson:

Nice answer. You went long again. So zero points. Zach, this might be the lowest score we've ever had, but at the same time, great answers. So it's kind of a bit of a paradox. We move to round four, double points, round four. So I'd say all to play for, but Bill's way out in front, so there's really not. Fueling digital grocery is round four. According to our forecast, digital grocery is poised to become the largest online shopping category in the US by 2026, accounting for nearly 20% of all online shopping. This would be the first time the category has led, edging out apparel and accessories notes senior retail analyst, Zach Stambul. In 2022, digital grocery was fourth and has since overtaken furniture and consumer electronics and now clothes. But Ethan, digital grocery needs blank to take it up a gear.

Ethan Cramer-Flood:

It doesn't need anything because it's going to be going up a gear already. This is already one of the fastest growing segments, particularly in the form of click and collect. I mean, I was thinking about coming up with some quippy answer about a terrible winter inspiring people to engage with these services even more because that would be akin to what launched them off in the first place when we were all stuck inside. But honestly, it doesn't need anything. This is

going great. This is one of the few areas that is still showing bang out growth, like what a lot of things used to show and most aren't anymore, but this still is.

Marcus Johnson:

Zach.

Zach Goldner:

Yeah. I'd agree with Ethan here. My word is focus. Digital grocery needs to focus to take it up a gear. Focus on the people that's targeting. And what they have to realize is that people have gone back to their original habits. A lot of people are still going back to grocery stores, but some of those same people that are going back to grocery stores are omnichannel buyers or also buying online. So focus on their demographic. Know that's going to be a part of their lifestyle, but not a full part. And as it is, digital grocery is still taking off. They don't have to do too much. It's becoming more and more of people's new habits, and it's a part of people's lives now.

Marcus Johnson:

Bill?

Bill Fisher:

Yeah, the picture's a little bit different in the UK where grocery is actually seeing a little bit of a dip. During the pandemic, it rocketed.

Marcus Johnson:

Digital.

Bill Fisher:

Yeah, sorry, digital. Yeah. So during the pandemic, the infrastructure in the UK was all there. It really rocketed, click and collect and delivery. But importantly, that was all free during the pandemic. Now, we expected to see some kind of recalibration, but costs have come into play. So to get a delivery, to do click and collect, you have to pay extra. And aligned with the growth of discount grocery retailers like Aldi and Little in the UK, given the economic conditions we're in with all the cost of living stuff, the incentive to shop for groceries online has receded a little bit. So from a UK perspective, things need to get cheaper again because

there aren't the financial incentives that there are for other categories for online shopping in the UK.

Marcus Johnson:

Two things for me. One, this new milestone that digital grocery becoming the largest online shopping category in the US by 2026 or this upcoming milestone is driven by two things, mainly food inflation, which has come down a bit. So it's not just driven by inflated prices. And then the second part of that is non-food and non beverage online sales growth being higher than the food and beverage kind. So cleaning products, personal care, both growing, but that's growing slightly faster, that non-food and non beverage portion. And then secondly, there's still plenty of room for growth. 83% of grocery sales in America in 2026 will still happen in stores. So growing, still nowhere near the majority. All right folks, that's all we've got time for the game. Hideously low scores for everyone except Bill who won the game. No one's surprised. Congratulations to Bill. You get the championship belt. A bit of a cakewalk to be honest, mate this week with Ethan and Zach running along.

Zach Goldner:

I declare an audit.

Marcus Johnson:

You also get the last word.

Bill Fisher:

I'm never prepared for a last word, Marcus.

Marcus Johnson:

You should be with this kind of competition.

Bill Fisher:

If you haven't watched the gladiators, check it out. It's a really cool show.

Marcus Johnson:

Yes, great last word.

Ethan Cramer-Flood:

Dude, this is why I always throw the game. This is why I voluntarily choose to lose so I don't have to deal with the pressure of having the last word.

Marcus Johnson:

Nice excuse. That's all we got time for for the game of the week. Congratulations to Bill who wins the championship belt. It's time now for dinner party data. This is the part of the show where we tell you about most interesting thing we've learned this week. We of course, start with Bill because he won the game of the week. Talk to us.

Bill Fisher:

Okay. I learned an astronomy fact the other day. If I were to ask you which planet is closest to the earth?

Marcus Johnson:

Oh, no.

Bill Fisher:

Your answer would be?

Ethan Cramer-Flood:

Venus.

Bill Fisher:

Venus?

Ethan Cramer-Flood:

Yeah.

Bill Fisher:

Do you know what's coming, Marcus?

Marcus Johnson:

No, I have no idea.

Bill Fisher:

Okay.

Marcus Johnson:

It's because mine's about the sun.

Bill Fisher:

Yeah, yeah, I noticed that. Yeah. Sorry.

Marcus Johnson:

Okay.

Bill Fisher:

So you would say Venus, right? Technically Venus comes closest to the earth on its orbit around the sun. However, you've got the sun and you've got mercury buzzing around it like that. Venus is going like that. And then the Earth is further out going like that. So at their furthest arcs in their orbit, the earth and Venus are actually a long way away. And the earth is much closer to Mercury. And this happens more often than not. So technically on average, the earth is closest to Mercury. And in technical terms, it's 1.04 astronomical units away. Venus is 1.14. And using that logic, Mercury is actually the closest planet on average to every planet in the solar system.

Zach Goldner:

Okay.

Marcus Johnson:

Wow. That's cool.

Ethan Cramer-Flood:

It sounds like a technicality to me.

Marcus Johnson:

It sounds made up because it's so baffling, but that's really cool. Bit of a technicality. Very nice though. Very, very good. Ethan

Ethan Cramer-Flood:

I have a quick work related one, but hopefully it'll still be fun because it's related to ratings, TV ratings and sports ratings, which we talk about all the time anyway, but this one struck me because I saw it independently. And this is the 23 million viewers on average that Peacock saw for its exclusive NFL playoff game over the weekend, which was just terrible news from my perspective. But great news for them and great news for streamers and probably reasonably good news for the NFL. I hated to see that enormous, gigantic, huge successful figure because I don't have Peacock, and I couldn't watch that game. And I sat around watching the Knicks game instead, which is fine. They won. That was cool. I watched the Knicks anyway, but I would have liked to have had the option to watch this extremely high profile game between Kansas City and Miami.

I couldn't. It was only on Peacock. And I was grumbling and thinking in my head about how the NFL is really blowing it by making this game not available to so many people. And then all the articles came out of the most streamed live event in the history of the US. Did great figures, did higher figures than last year's game that was on linear TV. It peaked out at 28 million at one point. So obviously everything worked out really great if you happen to have Peacock. Or to be fair, the people in the Miami and Kansas City metropolitan area did have access to this on regular TV. That's probably a few million extras that were able to watch it regularly. But overall, this is just a big banger of an event for them, which means that we're just going to get more of this going forward, unfortunately. But contest to them.

Zach Goldner:

Or Ethan, here's an alternative view on that. Maybe a lot of people wanted to tune in to see Taylor Swift.

Ethan Cramer-Flood:

Well, whatever it was, they got them on Peacock.

Marcus Johnson:

Well, they weren't looking for a good game, hopefully, because it wasn't that.

Ethan Cramer-Flood:

It was not a good game.

Marcus Johnson:



At least it wasn't a shootout. I mean, they blew it out.

Ethan Cramer-Flood:

It was a bad game, thankfully, but it was a high profile game. Of course, that does have something to do with it. I mean, Zach's making a joke, but it's also kind of true. If this had been a much less high profile game, they wouldn't have pulled these numbers. But nonetheless, it's clearly a success.

Marcus Johnson:

Yeah, very nice. Zach, you're up.

Zach Goldner:

Yeah, I'm going to change it up a little bit, and we'll talk about controversy regarding the Guinness Book of World Records regarding the world's oldest dog.

Ethan Cramer-Flood:

I saw this.

Zach Goldner:

There's a Portuguese canine named Bobi who died in October of last year. And Bobi's life spanned 31 years and 165 days. But skeptics were saying that Bobi's feet appeared to be different colors in the photos of him as a puppy and versus photos of Bobi now. So big controversy at hand. People are saying Bobi didn't look like a very old dog, didn't have many mobility problems. Well, maybe Bobi changed bodies at some point. There's an ongoing review at the moment that temporarily paused all record titles regarding the world's oldest dog. And as of right now, it's looking like Bluey, who's an Australian cow dog, who lived to the age of 29 and a half back in the 1930s, may regain his status as the oldest living dog. So personally, I'm rooting for Bluey, but we'll have to go see what the results of this review are.

Marcus Johnson:

That's too old, isn't it? That's too old.

Zach Goldner:

Well, to put it in comparison...

Marcus Johnson:

Twice as long as you supposed to live.

Zach Goldner:

The average dog, the median dog's lifespan is 10 to 15 years. So Bluey at 29 and a half, a real champ.

Ethan Cramer-Flood:

A bit shady.

Marcus Johnson:

That'd be like if you lived to 150. That doesn't sound like an enjoyable...

Ethan Cramer-Flood:

Seems shady. Seems shady.

Marcus Johnson:

Yikes. All right, we'll check back in on that when we've got some clarity around this controversy. All right, I've got one for you real quick. Just how big is the sun? Any guesses, folks? How many earths can fit into the sun?

Ethan Cramer-Flood:

Like thousands, I don't know.

Marcus Johnson:

You're on your way.

Zach Goldner:

Say 12000.

Marcus Johnson:

You say 12,000.

Zach Goldner:

Yeah.

Marcus Johnson:

It's 1.3 million. That's my first...

Ethan Cramer-Flood:

That is also thousands.

Marcus Johnson:

That is thousands. You're not wrong. Technically, you're right-ish. Two, to walk around the sun once would be walking around Earth 109 times. So third fact, the sun is big. However, the sun is pretty average compared to other stars. One that I can't pronounce, Betelgeuse, I've said it wrong.

Bill Fisher:

That's Beetlejuice.

Ethan Cramer-Flood:

Yeah, Betelgeuse.

Marcus Johnson:

Is that how you spell it? That's not how the movie, is that Betelgeuse?

Bill Fisher:

That's how you pronounce that word.

Marcus Johnson:

That's not how you pronounce it in the fantastic nineties film starring who's in that? Michael.

Bill Fisher:

Michael Keaton.

Marcus Johnson:

Keaton. I was going to say Cain.

Bill Fisher:

Nope.

Marcus Johnson:

And who else?

Bill Fisher:

Winona Ryder.

Ethan Cramer-Flood:

Winona Ryder. There you go.

Marcus Johnson:

And Gina Davis.

Ethan Cramer-Flood:

But they spell it differently in the movie, right? They spell it Beetlejuice. It's a play on whatever that German word is, and it's pronounced something relatively close to beetlejuice.

Marcus Johnson:

How have you guys heard of this? I've never heard this. So anyway, it's a red giant. It's about 700 times bigger than the sun. How have you heard of? All right.

Ethan Cramer-Flood:

Bill is out here tracking how far away Mercury is. [inaudible 00:35:14] Pronounced betelguese.

Marcus Johnson:

Bill's on it when it comes to the galaxy. Yeah, 700 times bigger than the sun. Which to walk around that red giant would be like walking around Earth 76,000 times. No, thank you. Betelguese is apparently how it's pronounced. It is also, in case you guys are wondering, it's also about 14,000 times brighter than our sun. And in case you were thinking, Marcus, these facts, they're spellbinding. I want to go see for myself. The sun is a simple 93 million miles away. To get there by plane, it would take you 20 years. If you wanted to drive, it would be

180 years. And if you fancied walking there, it would be a mere three and a half thousand years in case you want to check this stuff out yourself.

Ethan Cramer-Flood:

I case we want to fact check your claims.

Marcus Johnson:

Yeah.

Ethan Cramer-Flood:

All right.

Marcus Johnson:

Don't bother. 14,000 times brighter. I can't even look at the sun for more than like half a second without compromising your long-term health of your vision. Who looked at this and decided it was 14,000 times brighter than the sun? That's made up. Ignore everything I said. These are wrong. That's all we've got time for today. Thank you so much to my guests. Thank you, Ethan.

Ethan Cramer-Flood:

Happy New Year.

Marcus Johnson:

No, no. Cut that out, V. Thank you, Zach.

Zach Goldner:

Wishing a sad new year to Ethan after his comments.

Marcus Johnson:

Good. And Bill.

Bill Fisher:

Thank you. Goodbye.

Marcus Johnson:

Thank you to you. Congratulations on winning a championship belt for this week's game of the week. Thank you to Victoria who edits the show. James who copyrights, Stuart who runs the team, and Sophie who does our social media. Thanks to everyone for listening in. You can find us on Instagram if you fancy that, one word, insider intelligence for more stats charts of behind the scenes content. We'll hopefully see you on Monday though for the Behind the Numbers daily and e-marketer podcast. Happiest of weekends, not new year's. I can already hear Victoria being like, no, Marcus, you're not working from a bloody national park.

Victoria Grace:

Don't make me the bad guy. Live your life, dude. I support it.

Marcus Johnson:

No audio wise, that's going to be shocking.

Victoria Grace:

Oh, I just assumed that you would be van life-ing it. You'd be in a secure locate. You're not going to go to top of a mountain and be like, hello.

Marcus Johnson:

Maybe I'd like to have the option.

Victoria Grace:

I redact my statement.

Stu Entner:

It'll be quieter than when you have meetings in coffee shops.

Marcus Johnson:

Okay, thank you.

Victoria Grace:

That's true. Oh my God. So true.

Marcus Johnson:

Stuart, who runs the team. Zing.