


# The Weekly Listen: The rise and stall of Threads, streamflation, and just how significant is TikTok compared with its competitors?

Audio



On today's podcast episode, we discuss the quick adaptation and rejection of Threads by Instagram users, the complicated costs of bundling streaming services, where TikTok falls on the list of most influential social media apps, and more. Tune in to the discussion with our director of reports editing Rahul Chadha and analysts Evelyn Mitchell-Wolf and Max Willens.

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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 e-Marketer podcast made possible by Awin. This is the Friday show that has a solitary, minuscule plant in the background. Right Max?

Max Willens:

It's thriving, thank you. It's brand new and it's thriving.

Marcus Johnson:

It'll be dead by the end of the show. I'm your host, Marcus Johnson. In today's show, is Threads already finished?

Max Willens:

The teens and Zoomers, or Gen Zers, on Instagram saw push, heard about it, thought, "Eh, I'll give this a try." And looking at the engagement numbers that have followed, a lot of them said, "Eh, not for me."

Marcus Johnson:

The impact of streamflation.

Rahul Chadha:

So even if you're bundling all of these streaming services on your own, stacking up against the cable bill still looks pretty good from my perspective.

Marcus Johnson:

Will TikTok be the most significant social app in two years?

Evelyn Mitchell-Wolf:

Barring some miraculous product invention on Meta's part and a pretty serious reversal of sentiment among younger consumers, I can't imagine that TikTok won't still be on top.

Marcus Johnson:

Is the generative AI boom already over? And I've got some interesting facts about Americans and their road trips.

Joining me for this episode we have three people. Let's meet them. We start with our Director of Reports Editing, based out of upstate New York. It's Rahul Chadha, ladies and gentlemen. He's back.

Rahul Chadha:

Hey, Marcus, nice to be back.

Marcus Johnson:

There he is. Great to have you, mate. We're also joined by one of our Senior Analysts on the Digital Advertising and Media Team based in Virginia. It's Evelyn Mitchell-Wolf.

Evelyn Mitchell-Wolf:

Hello folks.

Marcus Johnson:

Hello. Hello. And finally we have another Senior Analyst on that very team based out of Philadelphia. It's Max Willens.

Max Willens:

Yo.

Marcus Johnson:

Hey, fella. So what do we have in store for you today? Well, we'll start by talking about whether Threads, Meta's Twitter, X, alternative is already finished. Then we move to the Debate of the Week this week where our panel will try to present the best for and against arguments they can from each of the three stories we have for you. And then finally, we end with Dinner Party Data. We talk about some random trivia. But we start of course, of course, with the Story of the Week.

Is Threads already finished? Well, traffic on Meta's Threads is declining writes Naomi Nix of the Washington Post. She notes that although Mark Zuckerberg's Twitter alternative Threads has attracted over 100 million signups less than a week after it was unveiled, it has struggled

to maintain its early momentum according to third party analytics firms. Worldwide daily active Android users on Threads peaked on July 7th, a matter of days after it came out at 50 million, 5-0 million, half of Twitter or X's number, notes SimilarWeb, before plummeting. So it hit 50 million and then plummeted to 10 million a month later on, just four weeks after it came out. Average time spent in the app also tanked, falling from 21 minutes, which is a few minutes off Twitter's average, to just three. Our very own Senior Director of Briefings Jeremy Goldman writes that. "It's far too soon to consider Threads the next Google Plus, Vine or Yik Yak. Threads has the potential to find its own niche as a platform, assuming Meta gives it the time," end of his quote. But folks, do we agree? Or is Threads already finished?

Max Willens:

I made a big deal of this, I think the first time we talked about Threads on this show of-

Marcus Johnson:

You pronounced it dead on arrival almost.

Max Willens:

I did do that, yes. And I'm sticking with it.

Marcus Johnson:

You might be right.

Max Willens:

I think part of the reason or my reasons essentially are unchanged, which is just to say that Twitter has a kind of reason for existing. For all of its problems, and there are lots of them, it is still a great place to go when you want to kind of stick a fire hose of information into your face. You can connect with lots of journalists, with world leaders. It is still where important conversations happen on major news and events. And at the moment it seems like there is no real reason for Threads to exist other than maybe catching people who have said, "The hell with Twitter, I want to go somewhere else."

And I think one of the things that bears that out actually is some of the data around who is using it. So Sensor Tower put out some research at the beginning of this month I think, which showed that nearly two-thirds of Threads' user base is between the ages of 18 and 24, and that's way, way, way, younger than the user base that you see on Twitter, according to our own



forecast, about 20% of its user base in the US is that age. And that to me just screams that Threads is a novelty. The teens and Zoomers, or Gen Zers, on Instagram saw push, heard about it, thought, "Eh, I'll give this a try." And looking at the engagement numbers that have followed that, a lot of them said, "Eh, not for me," and moved on. And I think that that's what's happened.

Marcus Johnson:

Yeah, young folks aren't sold. So according to our new Gen Z social media survey, two-thirds of these young people didn't use Threads as of July 25th, and even less of the 15 to 17 year olds had used the platform as well. So, yeah, if you're looking at young people being an indicator for future trends, it doesn't seem to be the case.

Evelyn Mitchell-Wolf:

Yeah, I think Threads got big fast because like you mentioned, Max, it was super easy to sign up, not because it was anything special. And what I don't fully understand is why Meta launched Threads when it did. Because my understanding is, like you mentioned Max also, that Meta saw an opportunity in Twitter's decline. It was still Twitter, right, when Threads was launched? Yeah.

Max Willens:

Yes.

Evelyn Mitchell-Wolf:

Yeah. So Twitter now X has dug itself into a very deep hole. It left all its other tools at the surface. It's very unlikely that it'll be able to change trajectories. So I don't think Meta had to take that minimum viable product in Threads to market yet. It could have waited and developed more features and I think it still would've seen, no matter when it launched, it would've seen that kind of remarkable initial traction if it had kept it so easy to sign up. So you only get launch hype once. It seems like they've squandered it on Threads so far.

Marcus Johnson:

Do we think that the ship has sailed then in terms of, you said kind of launch hype, because it does seem as though Meta jumped the gun with Threads. They forced Threads out the door when Elon Musk decided to cap the number of tweets users could view each day on Twitter,

which upset some Twitter folks. And they pushed the product out, was missing some key features, didn't have a chronological feed, DMing wasn't possible, hashtags, and they were hoping that folks would hang around long enough for future updates. But is that possible anymore or is the window closing on that opportunity?

Max Willens:

I think that there's plenty of other social platforms for people to check. It's not like if people are going to say, "Man, I think I'm just going to give this six more months. Maybe it'll get better."

Evelyn Mitchell-Wolf:

Let it bake some more.

Max Willens:

Yeah, they're just going to double tap, flick that closed, and find something else to look at when they're on the toilet or wherever they are.

Marcus Johnson:

It's not NBA Game Pass, right, Max?

Max Willens:

That's exactly right.

Marcus Johnson:

You'll give that some time to get better for sure. But something like this, yeah, there's just too many alternatives.

Max Willens:

Look, I have a debilitating addiction and I have to manage it as best as I can.

Marcus Johnson:

Let's talk it out.

So one thing on that, so wondering whether future updates could lead to a spike in usage, Threads recently said that users could share a post on Threads in a DM on Instagram, which



they say coincided with a gain in daily users according to Sensor Tower. However, Threads daily active users, they're still down 75% from launch. So a change or an additional feature added and a small bump in usage isn't going to bring it back to the numbers that it saw when it first launched.

Rahul, I'm wondering whether, so Ms. Nix of the Washington Post was noting that Thread's main rival Twitter slash X has been stagnating as well, according to data from SimilarWeb. Is this a bit of a referendum on text-based social networks? The fact that people wanted an alternative to Twitter to some extent, and some of them moved over to Threads, and now they're unhappy with that experience, but Twitter isn't, it's not like they ran back to Twitter is necessarily flourishing. Do you think that some of those folks are just swapping out that text-based social media behavior for more visual-based social media, video based social media like TikTok, YouTube?

Rahul Chadha:

I don't know. That's a good question. I mean, one of the things I always think about when we talk about Twitter is just comparatively how low its user numbers are. But like as Max mentioned, it has a very dedicated cohort of users. When I think about Twitter versus Threads, I think Meta just has the pockets to keep adding additional features, if it can get to feature parity with Twitter. There is no real downside I think from their perspective in playing the long game and just trying to slowly add users via trying to reach feature parity with Twitter. I think the other big question in my mind is always like, "What's Elon Musk going to do next?" There's always the potential he's just going to do something to scare away a bunch more users. And if at some point in the future Threads' feature set looks a lot more like Twitter's today, yeah, I don't think it's impossible that people might flee Twitter.

Will they all go to Threads? I don't know. Maybe some of them might go and move to another platform like Mastodon, but in terms of the future, that's a good question. I don't have the answer really, which is the future of text-based social media. I mean it made me think of the fact that TikTok recently added text only features, text only posts, but they're not really trying to create anything similar, I think to what Twitter as it exists today. They're just creating an add-on for people, I think, who are more in the content creator mindset.

Max Willens:

I think that the question of whether text-based posting is on the decline is really interesting actually. And I do think that if you look at the behavior that's encouraged by something like a TikTok versus the behavior that was invited by Twitter in the early years, it is really quite different. Like with TikTok, you can basically just kind of sink into your chair and just swipe and swipe and swipe and swipe. You don't have to really engage with anything at all if you don't want to. Whereas with Twitter, part of the fun of it was the sort of immediacy of being able to interact with people and get into conversations at the drop of a hat. And it's entirely possible that if you're a teenager or someone in their early 20s who kind of came up mostly looking at social as something that they experienced via Instagram and TikTok, you might not get the appeal of getting into it with strangers via short messages. So I think that that's a really interesting thing to sort of pay attention to over the longer period.

Marcus Johnson:

Yeah. Well, Threads, they said they're launching a desktop version, so we'll see if that helps with engagement at all. That's what we've got time for for the Story of the Week though. It's time now for the Debate of the Week. Today's segment, Make The Case.

Where our panel, Max, Evelyn, and Rahul present the for and against arguments for each of the following questions based on three news stories. Two contestants face off per question. Also the following takes don't necessarily reflect the analyst's personal views. Their job is to just present the best case regardless and offer objective analysis.

So for question one, it's Rahul going up against Evelyn. We're talking about the impact of streamflation. Streamflation is here and media companies are betting you'll pay up, notes a recent Wall Street Journal piece. It points out that the average cost of watching a major ad-free streaming service is going up by nearly 25% in about a year as entertainment giants bet that customers will either pay up or switch to their cheaper, more lucrative ad supported plans. The article cites LightShed Partners analyst Rich Greenfield who says, "Can you raise prices by 30% and not increase churn?" That's the big question. And so our question is, yeah, can you? Streamflation is here, but will folks just pay the increased price? Rahul, you are going to present the will case, so people will just pay the increased prices. 60 seconds on the clock. Make the case.

Rahul Chadha:

Sure. So I did a little bit of math. So if you combine the cost of HBO Max, Hulu, Disney Plus, ESPN Plus, Netflix and Amazon Prime, you're coming to a total of \$65. And that doesn't discount buying an annual subscription. Some services offer that. That compares to the average US monthly cable bill, sorry, the ranges that I found were all over the map. So at the low end there were \$80, so we're still like \$15 under that, and it's 220 at the high end. So even if you're bundling all of these streaming services on your own, stacking up against the cable bill still looks pretty good from my perspective. And as far as those who are thinking about downgrading to an ad tier, they're in for a worse user experience. There's no consistency about ad loads among all these services. Streamers still have a huge problem with frequency capping, meaning people see the same ads over and over again. And streamers aren't subject to the same federal regulations about volume levels like broadcast TV is, meaning that when viewers using streaming services see ads, they might be blowing out your eardrums.

Marcus Johnson:

Evelyn. People won't just pay the increased prices. Make the case.

Evelyn Mitchell-Wolf:

People aren't endless money machines. They have maximum budgets and we all know wages don't keep up with inflation. And the fact of the matter is people can't afford to just pay ever-increasing prices for their streaming services. Because while it might be \$65 now, Rahul, what's to stop it from reaching that 80 and above that would bring it in parity with cable. I think it's far more likely that we'll start to see folks downgrading to those ad supported tiers, worse user experience or not. Or we'll see some rhythmic churn going on where consumers will have maybe one or two streaming services that they keep all the time. And then when one of the other streaming services comes out with a must watch series, we'll see a temporary spike in subscribers for that service. And I think those spikes will be far fewer and far between because the services are all also cutting production costs too. So none of them will be able to support a steady stream of high budget hits, which just makes consumers even less likely to swallow the price increases.

Marcus Johnson:

So the state of play, streaming services and their costs. So today US households pay \$30 a month for an average of four streaming services, according to that Journal article. In 2018, they were paying half as much, \$15, for half the number of services, two. That's according to

S&P Global Market Intelligence. Disney did say that when they increased the ad-free price from eight to 11 bucks, 94% of subscribers ate the \$3 increase and stuck with the service. That was going from eight to 11. You start getting into the double digits and up then you could see a higher number of people leave, arguably. The thing is these streaming platforms don't really have a choice but to raise prices. Disney Plus is losing money, Peacock is losing money, Paramount Plus is losing money, Max is losing money, and Netflix is the only one that's not. And so they've kind of painted themselves into a corner, so to speak, because they need to increase prices to be able to make these businesses sustainable, let alone wildly profitable.

All right folks, question two. And we've got Evelyn going up against Max. Will TikTok be the most significant social app in two years? TikTok will be the number one social app in terms of total minutes by 2025, overtaking Facebook. TikTok already overtook Instagram in total minutes last year. And it has Facebook in its sights. And we estimate it will overtake them in total minutes in just two years. But does that make TikTok the most significant social app? Just because it has the most minutes, the most total minutes, at least by 2025. Evelyn, by 2025, TikTok will be the most significant social app. 60 seconds. Make the case.

Evelyn Mitchell-Wolf:

I'll do you one better, Marcus.

Marcus Johnson:

Oh.

Evelyn Mitchell-Wolf:

I'm arguing that TikTok is already the most significant-

Marcus Johnson:

Slow down.

Evelyn Mitchell-Wolf:

-social app.

Marcus Johnson:

Do that dance.

Evelyn Mitchell-Wolf:

It's cultural cachet is simply unbeatable. TikTok is where trends are set, by consumers of course, but also by the platform itself. It has totally reshaped the social advertising landscape around short video in only a few years. And try as it might, Meta, can't get rid of the TikTok watermark on reels. TikTok is the juggernaut. It has already amassed more time spent than Instagram, despite its smaller user base. And as far as 2025, barring some miraculous product invention on Meta's part and a pretty serious reversal of sentiment among younger consumers, I can't imagine that TikTok won't still be on top.

Marcus Johnson:

Max, by 2025, or now, as Evelyn suggested, TikTok won't be the most significant social app make the case.

Max Willens:

Well, Evelyn's made a great case, but if I have to argue this point because she got to the will position before I did in the email, I think the best way to think about this is that it's going to be Facebook in 2025 and the reason is not so much because of the feed, but because of features like Marketplace groups. When you get older and you start a family or you become entrenched in a community, you find yourself being pulled, really quite against your will, into Facebook groups to keep abreast of what's going on either with your child's school or with alumni groups. And if you find yourself being dragged rather inexorably into Marketplace, if you want to buy yourself some cheap pots for plants that you didn't think you needed.

And at the moment TikTok doesn't have any of those kind of lock-ins which kind of guarantee Facebook's longevity and have done a lot to ensure Facebook's stickiness well past its point of peak cultural relevance. So I think that unless TikTok can reinvent itself as a groups hub, a used goods marketplace, and a messaging super center, it's going to be Facebook, sorry to tell you.

Marcus Johnson:

Max, you would be a horrible defense lawyer, because Evelyn made great points. "My client probably did it, but since I promised to represent him, here's a couple of things."

Max Willens:

This guy's not paying me enough, your Honor.

Evelyn Mitchell-Wolf:

I thought they were excellent points.

Marcus Johnson:

It was a good idea.

Evelyn Mitchell-Wolf:

I recently got invited to my high school reunion on Instagram, so can't argue with that. I spent a lot of time on Instagram, so it's not like it needed to pull me back in. But to your point, it's all happening there. And I don't even know how it could happen on TikTok.

Marcus Johnson:

Yeah. TikTok already ahead by daily minutes. Today TikTok users spend nearly twice as long on TikTok as Facebook users spend on Facebook each day, 31 minutes a day for Facebook people and TikTok's at 54. All right, let's move to our final question here, question three. And it's Rahul against Max. Is the AI boom already over, questions Sarah Morrison of Vox, noting that generative AI tools are generating less interest than just a few months ago when ChatGPT became public at the end of last year. A hundred million folks rushed to check it out in less than two months, then as if by magic, every big tech company announced that they had their own generative AI initiatives in the works. A much smarter GPT-4 hit the market a few months later, which was the next version of ChatGPT. And it had appeared as though by Thanksgiving robots would be doing all of our work for us. But things, headlines, appear to have calmed down a lot since, the question being is the AI generative AI boom already over? So Rahul, the AI boom is already over, make the case.

Rahul Chadha:

Yeah, I mean I think we're in the trough of disillusionment phase of the Gartner Hype Cycle. Like you mentioned, ChatGPT 3.5's release generated a huge amount of interest and then everybody and their brother was slapping an AI solution in whatever they were trying to sell to people or show to people. But I think most people were attracted to the novelty and when they tried to use these tools to introduce efficiencies to their lives or their jobs, they hit a wall.



I mean I know I did. We tried to use Chat GPT 3.5 here and the barrier to getting it to generating a useful outcome is pretty high.

I think people are just either fatigued or overwhelmed by it. And prompt engineering, which can we just take a second to watch how silly that phrase is, I think it's analogous to describing yourself as a query engineer if you ever used Alta Vista. But anyway, even prompt engineering itself is a skill that requires a substantial time investment and sometimes little return on that investment. I think when you add that to the potential regulations that will slow the development of IA, and I think we're going to see a slow burn in gen AI adoption via from here on out, not a boom.

Marcus Johnson:

All right, Max, the AI boom isn't already over. Make the case.

Max Willens:

So I'm going to step on a little bit of the stuff that I am preparing for a webinar that I'm presenting on generative AI in the workplace. But I would just say that the boom is not over and it's because of the interest among employers. I think that obviously the thing that's sort of catapulted generative AI into our minds was consumer uses, but fundamentally generative AI is going to be a workplace technology, not a consumer technology. By 2025, our own forecasts show that I think close to a quarter or a third of people in the workplace in the US are going to use generative AI in some form or fashion.

What Rahul said about its current limitations is absolutely correct, but I think that the difficulties that we've had internally are not representative of the pretty plug and play uses that it has for any company that has to deal with customer service, for companies that have to generate truckloads of marketing copy, or do content marketing at scale. And so I think also too, the other piece to remember is that the amount of venture capital that's poured into generative AI has already crossed into the billions and as those companies try desperately to gobble up market share, we're going to see a sort of secondary wave of hype around the potential of this technology. So not dead at all, just in the office, not at home.

Marcus Johnson:

Good arguments, folks.

Max Willens:

Sorry in advance to all of you because that what's happening.

Marcus Johnson:

Great. Evelyn, what do you think about this?

Evelyn Mitchell-Wolf:

I think we certainly are in kind of a lull, but I'm on Max's side here. I think, well, I guess you kind of both made the point, coming from different directions. It's we are on our way to a future where generative AI will play a larger role, whether we call it a boom or a slow burn. Either way, the future is coming. And so I just hope that, I mean my mind is also on kind of the future of the open web and what generative AI will mean for how we interface with the internet because a lot of my job is reading online and I really hope that my source material doesn't dry up because it's taken over by chatbots who offer no insight whatsoever.

Marcus Johnson:

Yeah. All right, folks. Great arguments, great points. That's all we've got time for for the Debate of the Week, talking streamflation, whether TikTok's the most significant app, and the AI boom already being over. It's time to move on to our final segment of the day. It's 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 Rahul, because it's his first episode back in a while. What you got for us, mate?

Rahul Chadha:

So I found some interesting data from a company named Flamingo, which I think sells some kind of software to help companies manage the sick time of their employees? So the day of the year that workers most commonly called out sick on was August 24th. Why? I have no idea. It didn't seem like Flamingo did either. Maybe because people like to play hooky in the dog days of summer? I don't know. But the next three dates were all in the colder months of February, October and December, which I guess made more sense to me if people are getting more likely to be sick then. The most common reason for taking a sick day was cited as a stomach ailment at 54%. Which makes sense because nobody asks follow-up questions when you say you got a GI problem. Nobody wants details about that. That was followed by COVID

at 25%. And then interestingly to me, stress and anxiety at 9% because I feel like people are more apt to take a mental health day these days than they were probably in previous times.

And there's a huge, this is different data, I think this came from YouGov, but there's a huge generational gap in thinking about sick days. So according to this YouGov survey from 2022, 60% of 18 to 20 year olds thought workers were entitled to take all their sick days, regardless of whether they were ill. That figure dropped to about 50% for the 30 to 64 year old cohort, and then just 36% for those 65 or older. So retirees think you should really be sick even when you call in sick, I guess because they don't have jobs anymore.

Marcus Johnson:

Wait, so they're saying you should just walk it off?

Rahul Chadha:

Walk it off, yeah, I guess so.

Marcus Johnson:

Right.

Rahul Chadha:

Tough it out.

Evelyn Mitchell-Wolf:

No, they're just not necessarily considering sick leave as part of your compensation. Where I think maybe younger-

Rahul Chadha:

Yeah, it's not like your guaranteed time off I guess.

Evelyn Mitchell-Wolf:

Yeah.

Marcus Johnson:

Ah, okay.

Max Willens:

But also rub some dirt in it.

Evelyn Mitchell-Wolf:

Well, I'm wondering if August 24th has anything to do with school starting and maybe parents are like, "I got to recover from this."

Rahul Chadha:

That's a good point.

Max Willens:

It's Kobe Bryant Day. It's a big deal in the Philippines.

Evelyn Mitchell-Wolf:

Ooh.

Max Willens:

Maybe that's a big part of it? It's absolutely not a big part of it. I just I know that that's true about August 24th.

Marcus Johnson:

All right. Evelyn, you're up.

Evelyn Mitchell-Wolf:

Okay, I have some more YouGov data. YouGov surveyed just under 9,000 US adults and asked them, "If someone you know messages you something funny, which of the following would your response be most likely to include?" And I'm just going to go straight into the percentages of these and you can have a live reaction to what the options are. So first, this is not in first place, this is just in the order of they are on the survey. Haha at 12% of respondents. LOL, in all caps, at 33%.

Marcus Johnson:

Aggressive.

Max Willens:

Aggressive.

Marcus Johnson:

Yep. Absolutely. Yeah, it's too much.

Max Willens:

Too much.

Evelyn Mitchell-Wolf:

I can't believe y'all said the exact same thing.

Marcus Johnson:

Right here, mate.

Evelyn Mitchell-Wolf:

That's funny, at 9%.

Max Willens:

Rude.

Evelyn Mitchell-Wolf:

An emoji of a laughing face at 32%. So that's tied, pretty much tied, with LOL, all caps. And then we have something else and not sure. It's not specified anywhere on the page that I could find, but the numbers add up to about 100% so I'm assuming respondents could only select one option. And I also noticed that react to the message with a haha react was not included as a response option, which is something that I do frequently. And I feel like that is-

Max Willens:

Penalizing the iPhone shows.

Evelyn Mitchell-Wolf:

Well, I guess in the US iPhones are more popular, right?

Max Willens:

Narrowly.

Evelyn Mitchell-Wolf:

But worldwide Android is far more popular. So the first thing I did though after reading this data was to break things out by age because I was like, "There's got to be something interesting going on there." But I was surprised by how few stark differences there were between age cohorts. Haha is slightly more popular among the 30 to 44 cohort and LOL all caps is less popular among 65 plus. But I think the reality is that the meaning behind these responses is so nuanced and layered that the most accurate answer would be it depends, as is often the case. It depends on the person that sent the text and it depends on the humor, the type of humor of the message. It depends on the recipient's mood. I mean I personally very rarely use LOL all caps, but I use LOL lowercase all the time. So

Rahul Chadha:

I was wondering if they did include the skull emoji as a potential response. Sorry, I just think about it as an old. There was a point where I was like, "I'm too old to use lol." And then I just adopted it. And then I learned about the skull emoji and I'm like, "I feel like I'm too old to use that." The nuance for me is trying to navigate the waters of just acting my age in online message responses.

Marcus Johnson:

So the that's funny comment in a text is one thing, but when people do it in person it kills me because you'll say something and they'll go, "Oh yeah, that's funny." And it's like, "Is it? It's not funny enough for you to actually laugh, but for you to say it." It's fine. It drives me crazy. It's so weird.

Max Willens:

It's signals that I have not made you laugh.

Marcus Johnson:

Yeah.

Max Willens:



And that you I are enemies.

Marcus Johnson:

Don't say anything.

Evelyn Mitchell-Wolf:

See, again, it's nuance here. There's so much nuance. It's really hard to design a survey question that gets at the heart of this.

Max Willens:

I want to know what the broader package of questions was because I mean it's super interesting, but what are they just trying to get at how unable we are to relate to each other anymore? Like were there questions about concert behavior. Have you guys heard about the concert epidemic?

Rahul Chadha:

Throwing stuff on the stage?

Max Willens:

Throwing stuff on the stage, screaming, TikTok'ing the whole way through it. If you really want to fill yourself with fear, look up the threads on Phoebe Bridger's Reddit about concert behavior, how we've all lost the ability to-

Marcus Johnson:

Just people forgetting how to behave in public.

Rahul Chadha:

I feel like the big debate when I used to go to arena shows was like, "Should you stand up or sit down at your seat?" It's like, "Everybody just sit down." It's like, "We're going to be sitting and watching a show. Why is everybody standing?"

Max Willens:

Oh, I don't know. I got to stand up. The people-

Marcus Johnson:

Oh, you're that guy.

Max Willens:

I understand that it's-

Marcus Johnson:

Max is that guy.

Max Willens:

Yeah, people already get mad at me if they get behind me at a concert.

Evelyn Mitchell-Wolf:

Because you're tall.

Max Willens:

Yeah. I know.

Rahul Chadha:

That is true.

Marcus Johnson:

You're the worst.

Max, you're up.

Max Willens:

So I don't know how long this has been true or if I'd only just recently noticed it, but I listened to an episode of the show recently, Marcus, where you said that just interesting factoids, will do, we don't need to have percentages and such. And so I'm really going to lean into that this week. We've been talking a lot about streaming, a lot about streaming sustainability, about whether streaming is going to survive, or not survive, but whether all the services that are floating around are going to survive. And it got me thinking a lot about how a lot of the services that I really like the most, I don't necessarily watch them all the time but just like them the most because they exist, are streaming services that are filled with random foreign stuff that is sort of hard to find anywhere else and sort of worrying that these things are going to

go away. So I'm going to use my Dinner Party Data segment to Kate for Topic, MUBI, and Canopy. Do you guys use any of these?

Evelyn Mitchell-Wolf:

Nope.

Rahul Chadha:

I used to use Canopy when my library system supported it.

Max Willens:

I know. That's the big problem. So I'll quickly run through these. So Canopy, as Rahul mentioned, is a streaming service that was launched in Australia about 12 years ago. And the idea is rather than paying every month, your membership is essentially funded by your participation in a library system. So all you have to do is enter your library card and it gives you access to a pretty awesome collection of old movies, British television, and actually a lot of really good Chinese cinema. If you want to watch a movie that will just make you want to walk into the ocean with bricks in your pockets, you should watch *An Elephant Standing Still*, which is completely incredible, but it is so, so, so depressing.

Then there's MUBI which was started by a Turkish guy who was trying to watch the movie *In The Mood For Love* and couldn't find a place to stream it online and he said, "This is BS. I want to fix this." And so he launched this service that specializes in foreign films, but they own a production studio, they own a distribution outlet and a third piece as well, which sort of makes them very vertically integrated.

And the third one is Topic, which is owned by Pierre Omidyar, the eBay founder who has been trying to sort of build a media empire with First Look Media and mostly failing at it. But Topic is great. It has *Harlem Law*, which I think is the funniest show no one ever talks about, and this Canadian show that I'm really enjoying right now called *Happily Married*, which is about two couples who send their kids away to summer camp and then are instantly plunged into lives of crime and murder.

Evelyn Mitchell-Wolf:

Ooh.

Max Willens:

And it's a comedy.

Evelyn Mitchell-Wolf:

Nice.

Max Willens:

So win, win, win, win, win.

Marcus Johnson:

So Max, I said you didn't need to bring numbers. I didn't say you could just plug random niched streaming platforms.

Max Willens:

I got a number. The number is three. There are three streaming services that I think are really cool.

Marcus Johnson:

Well played.

Max Willens:

But not enough people.

Marcus Johnson:

Nailed it.

Max Willens:

I tried really hard to find their subscriber numbers, which maybe is a bad sign for all three of these things I could not find.

Rahul Chadha:

Yeah, I would plug Canopy because if you're a fan of the documentary filmmaker, Frederick Wiseman I think that's the only streaming platform that his films are available on. Or at least this was true maybe two or three years ago. And MUBI I forgot about, but I used to use that

because it's the one where they were models kind of like you have a 30 day window to watch the film, right? I don't know if it's still like that.

Max Willens:

I should know the answer to this. I think there are some movies that that's true on, but they also just have a permanent library of stuff as well.

Marcus Johnson:

Very nice. Giving some of the smaller folks some recognition. I appreciate that. So I've got one for you real quick. It's about road trips, five facts for you. So I'm about to go on a road trip, which is why this is top of mind. So number one, how many people are going on road trips each summer? More than 200 million Americans will take a road trip during any given summer. That's nearly two-thirds of Americans. It doesn't have to be-

Evelyn Mitchell-Wolf:

Love a good road trip.

Marcus Johnson:

Yes. It doesn't have to be to the end of the earth. It could just be a couple of hours. Number two, what share of American vacations are by car? Well, pre-pandemic, 2019, there were some numbers. 85% of summer travel in the US was done by car, 8% was by rail, cruise, or other. 7% of people flew.

Evelyn Mitchell-Wolf:

Cruise? Where are they-

Marcus Johnson:

Oh yeah.

Evelyn Mitchell-Wolf:

Cruising too domestically? There's just so much land.

Max Willens:

Maybe on a lake.

Evelyn Mitchell-Wolf:

Oh, okay. Sure.

Marcus Johnson:

Where are they cruising to? Well, you could start-

Evelyn Mitchell-Wolf:

I guess you could go down the-

Max Willens:

I think her questions fair.

Evelyn Mitchell-Wolf:

There's so much in the middle of the country that you can't get to by cruise so this was my kind of fascination.

Marcus Johnson:

That's true. I don't know how much of that is, maybe it's mainly rail, which also is quite surprising. It's a beautiful country. Lots to see. The trains should be better. But yeah, I'm a little bit surprised given the current condition. But yeah, just 7% of people flew versus 85% of people who drive somewhere.

Number three, how far are they traveling? The average road trip takes a little under three hours, so not too too far. However, 18% of summer road trips will journey 500 miles or more. That'll get you about a sixth of the way across the country.

Number four, why do Americans take road trips? Number one reason is the simple fact that driving is a lot cheaper than flying, according to 53% of folks in a survey from One Poll and Quaker State from 2022. The second reason for driving versus flying was seeing and experiencing more together. And then third was spending quality family time with one another. Wonder how long that lasts?

Evelyn Mitchell-Wolf:

Yeah. That's tough to say. Ah, but okay.



Marcus Johnson:

Number five, final one here is the most popular road trip. Anyone know where the most popular road trip is in the country?

Evelyn Mitchell-Wolf:

Disney World.

Rahul Chadha:

Vegas?

Marcus Johnson:

Nope. Nope.

Evelyn Mitchell-Wolf:

Grand Canyon?

Marcus Johnson:

Nope.

Max Willens:

Yellowstone?

Marcus Johnson:

No. The Blue Ridge Parkway.

Evelyn Mitchell-Wolf:

Ooh, hey.

Marcus Johnson:

Which runs through-

Max Willens:

Say what?

Evelyn Mitchell-Wolf:

I live there.

Marcus Johnson:

Yeah, North Carolina and Virginia, America's most popular road trip according to AAA. Grand Pacific Northwest-

Evelyn Mitchell-Wolf:

It's so pretty, y'all, the Blue Ridge Parkway. Highly recommend.

Marcus Johnson:

Oh, yeah?

Evelyn Mitchell-Wolf:

Really gorgeous. Yeah.

Marcus Johnson:

Grand Pacific Northwest, 550 miles through Oregon and Washington State, is second. And then the Smoky Mountains, 500 mile loop with views of America's most visited National Park Smoky Mountains, American's most visited National Park, but third most popular road trip in the US.

Evelyn Mitchell-Wolf:

Does anyone else feel like road trips have gotten substantially shorter as they get older?

Rahul Chadha:

That's what I was thinking.

Evelyn Mitchell-Wolf:

Yeah, when I was little-

Rahul Chadha:

Like 3 hours?

Evelyn Mitchell-Wolf:

Yeah, it seemed like an age with three hours on a trip.

Rahul Chadha:

Yeah, I guess this just goes to how you want to define a road trip, but to me, a road trip, I don't know, it like invokes the cliché of the journey's the destination, kind of like being on the road was the point. You were going to someplace that was kind of obscenely far away with your friends and it was going to take 20 hours of driving something.

Marcus Johnson:

Yeah. Like a Route 66.

Rahul Chadha:

Three hours? I don't know. That's like a daily jaunt or something.

Marcus Johnson:

Commute.

Rahul Chadha:

Doesn't feel like it has the heft of a road trip.

Marcus Johnson:

Yeah. Well, this is an interesting fact about driving. So distracted driving, leading cause of accidents on road trips. Mainly the smart phone's fault, unsurprisingly. According to the National Highway Traffic Safety Administration, taking your eyes off the road for five seconds if you're driving at 55 miles per hour is like driving the length of an American football field with your eyes closed.

Rahul Chadha:

That's comforting.

Evelyn Mitchell-Wolf:

That's terrifying.

Max Willens:

Yeah, that's crazy.

Marcus Johnson:

Yeah, I bet that takes down the number of people who want to go on road trips. Anyway, that's all we've got time for for today's episode. We'll leave you on that cheery note. You can always come to us for optimism. Thank you so much to my guests. Thank you to Rahul, ladies and gentlemen, he's back.

Rahul Chadha:

Thanks Marcus.

Marcus Johnson:

Thank you to Max.

Max Willens:

Always a pleasure, Marcus.

Marcus Johnson:

And thank you to Evelyn.

Evelyn Mitchell-Wolf:

Thank you Marcus. Thanks everyone.

Marcus Johnson:

And thank you to Victoria who edits the show, James who copy edits it, and Stuart who runs the team. Thanks to everyone for listening in. We'll see you guys hopefully on Monday for the Behind The Numbers, no, we won't. It's Labor Day. We'll see you guys hopefully on the day after, Tuesday, for the Behind The Numbers Daily, an e-Marketer podcast, still made possible by Awin. Happy weekends.