The Weekly Listen: The best Apple Vision Pro experiences, instant AI-generated videos, and who's ready for shoppable media?

Audio

On today's podcast episode, we discuss which app experiences best transfer over to the new Apple Vision Pro mixed reality headset, whether instant AI-generated videos will be a hit, department stores' path to relevancy, if folks are ready for shoppable media, how marriage is changing in the US, and more. Tune in to the discussion with our analysts Ross Benes, Bill Fisher, and Carina Perkins.

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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 and eMarketer Podcast, made possible by StackAdapt. This is the Friday show that thinks everything's bad. All right, Bill.

Bill Fisher:

You're right.

Marcus Johnson:

What's wrong today?

Bill Fisher:

I don't know, mate.

Marcus Johnson:

Okay, Bill-

Bill Fisher:

It's February.

Carina Perkins:

It's a bit drizzly in the UK. It's a bit depressing, the weather.

Marcus Johnson:

Isn't it always? Bill was like, "I'm feeling a bit negative today." I was like, "Today, just today, Bill?"

Bill Fisher:

Mm-hmm.

Marcus Johnson:

You're normally so chipper. He's not. In today's show, what will be the best app experiences on the new Apple Vision Pro mixed reality headsets? Will instant AI-generated videos be a hit? Do department stores have a path to relevancy? Are folks ready for shoppable media? And what does the marital status of folks look like in the US?

Join me for this episode. We have three people. Let's meet them. We start with our principal analyst, who is based in the UK, covering everything over there. He lives on the south coast of that country. It's the host of the Around the World, behind the Numbers show. It's Bill Fisher.

Bill Fisher:

Hello, Marcus.

Marcus Johnson:

Hello. The effort you have to put into that was noticeable. We're also joined by someone else in that very country across the pond, also based on the south coast, one of our senior analysts covering retail and things in the UK. It's Carina Perkins.

Carina Perkins:

Hi, Marcus. What a wonderful day it is.

Marcus Johnson:

Hello there. That's too much. You've overdone it. We're also joined by Ross Benes, who is based just above New York City. He's one of our senior analysts, covering everything digital advertising and media.

Ross Benes:

Hey, Marcus.

Marcus Johnson:

Hey, fella. Did I say your name? It's Ross Benes.

Ross Benes:

Yep, you said my name.

Marcus Johnson:

All right, it's twice. It's there twice, just in case.

Ross Benes:

Say my name. Say my name.

Marcus Johnson:

Good song. Destiny's Child.

Ross Benes:

Great song.

Marcus Johnson:

Yep. All right, so today's episode, what do we have in store for you? Story of the week. We'll talk a bit about Apple Vision Pro and the best use cases for it, why it's struggling, and what adoption will look like in a couple of years. We then move to the game of the week. We're talking about a lot of different topics, AI-generated videos, department stores, and shoppable media in our Debate of the Week segment, and we end with some random trivia. It's called Dinner Party Data, but we start, of course, with the Story of the Week.

So what would we think if the Apple Vision Pro was the first VR/AR headset? So this is the question I was posing, or the way I was framing this segment, because there have been so many bad versions of headsets that it's hard to take each one in isolation without having some preconceived idea of what the other ones have been like and bringing that disappointment along to the party when you're reviewing the latest version. We covered the new Vision Pro headset from Apple, mixed reality headset, we covered it when it hit the market at the start of the month. It describes itself as a spatial computer that seamlessly blends digital content with the physical world. Since it's launched, there've been a lot of articles that have been written about the experience, how it stacks up with the competition, and how it can or can't push the space forwards, but I wanted to try and be optimistic because there's been a lot of criticism about the headsets and why it won't work.

We'll get to some of the barriers in a second, but trying to be positive, bill and Ross, to be honest, you, too, Carina, probably not going to be the best question, but I'm going to ask it anyway. So the new mixed reality headset, it's launched with 600 dedicated Vision Pro apps, but which app experience transfers to the Apple Vision Pro the best? So if you took one app

out of your phone and had to experience that app in the headset most of the time, what's the best experience? Carina?

Carina Perkins:

So I feel like this is a bit of a trick question because I think the best the app will be one that is specifically designed for the Apple Vision Pro.

Marcus Johnson:

Okay, good answer.

Carina Perkins:

I think at the moment, probably the best use case is gaming still. I know it's trying to be a computer. I'm not 100% convinced about that yet. Gaming, and because I'm not a massive gamer, the one app on my phone, which is a game, is a chess game. So I'm going to say it would be quite fun to play my chess game-

Marcus Johnson:

Wizard's Chess.

Carina Perkins:

... in the Apple Vision Pro.

Marcus Johnson:

Very nice. Ross?

Ross Benes:

Well, I was also going to say gaming. That seems like the most fun use of this. I've seen the ads for this on TV, and they'll show someone laying on the couch with the headset on, but then they're just watching the TV. They're looking up in the sky, watching the TV, and then they zoom out, and that person has a huge big screen TV on their wall anyways, so I'm not sure you're gaining a ton unless the show is interactive and if you're getting to an activity that, to me, seems more like video games. So the New York Times article you shared talked about the guy got a demo of a Super Mario Brothers game. That seems like it'd be real fun. Most of the

apps on my phone, I would not want them to be in 3D, like please don't bring work Slack like into a 3D headset-wearing thing. That sounds dystopian.

Marcus Johnson:

What you just said about being interactive is quite interesting because what if you could watch a sporting event and there were cameras in, say, the helmets? I feel like there are cameras everywhere. They're in the pylons, they're flying over the head on wires. What if there was a way that you could switch your views to be as though you were playing quarterback or playing D-line or moving around the field from using different angles, some kind of interactivity? Obviously it's mixed reality as well. So you can have augmented reality, you could pull stats up maybe to the side of your actual TV screen.

Carina Perkins:

But it would only be fun if you were just going to be watching the sporting event by yourself anyway, wouldn't it? I think that's kind of the problem here. So watching a sporting event is often a bit of a social activity, and you're all talking about what's on screen, and if you're all sitting there with headsets watching different things.

Marcus Johnson:

Yeah, that's a good point. I wonder what the numbers look like though in terms of people watching content by themselves and whether the people in our sports lends itself very much to watching with other people are out in social settings, but it does feel like we are quite isolated in our content consumption anyway. What people feel like a lot of the time, they're like, "Wow, I want to watch it with people." Do you actually watch stuff with people? Sports, perhaps, Netflix shows, maybe not as much. So I wonder if that would be as big of a problem as perhaps it should be.

Carina Perkins:

No, I was thinking specifically about sports there. Yeah, I agree. For wider TV watching, possibly.

Marcus Johnson:

Yeah. Ross?

Ross Benes:

I was going to say, it depends how many people in your household. If you're a single guy with an apartment, I get your point. But if you have a spouse and kids and you're all watching the same cartoon, you probably don't want to have to buy four of those things.

Marcus Johnson:

That's true.

Ross Benes:

You just want to sit back and mindlessly watch Bluey or whatever.

Marcus Johnson:

Yeah. I wonder if there's going to be a way to sync the contents between the two so you could both have headsets on. Maybe that seems a bit ridiculous, but yeah, maybe then you'd have a more of a common shared experience. Bill, the best app experience?

Bill Fisher:

Look, I'm not going to be boring. I could just say gaming again because I think that is the obvious answer. But listen, I'm going to go against the grain here, and I'm going to say I'm quite excited, quite excited about video. I know what Ross is saying. You've got a big screen covering your entire wall with surround sound, you've got all that anyway. Why do you need a headset to do it? But I'm particularly interested by this sort of 3D video so you can be immersed in some of the home video clips you've taken, for example.

I know some of the reviewers have said it doesn't work that well, but I think when the tech to capture it catches up, I think that could be kind of nice. Just think about it down the line, spending time with a loved one who maybe isn't around anymore that you've captured in fantastic 3D detail, and you are there with them immersed in that environment. I think that's quite a nice thought. I don't think we're there with it yet, but we're getting closer with the Vision Pro.

Marcus Johnson:

Surprisingly optimistic, Bill. All right, folks, let's move to the barriers real quick. Aside from the $3,500 price tag, which is not terribly palatable, Carina, the main barrier to adoption?

Carina Perkins:

I think it's what we've said already. It's just the use cases are fairly niche, I guess, and it really lends itself to people who spend a lot of time home alone, which is, I guess, gamers.

Marcus Johnson:

Isn't that everyone? Where do you live, Carina? I want to live in your society.

Carina Perkins:

Well, I spend time home alone, I guess, working. So I guess yeah, maybe I could use it to work, but I feel like it is solving a problem that I don't have currently, working. So I'm not convinced at the moment of the kind of ease of use, the practicality, is it really going to improve my working experience? I don't think so so much. Like Bill says, I'm sure there are some cool future use cases. I just think where we're at now, I think it's the kind of novelty thing, which is the kind of thing you'd buy, spend a couple of weeks going, "Oh wow, cool," and then it would just go to the back of your closet and not be used very much.

Marcus Johnson:

Oh, that is fun. Oh, so we've got some-

Carina Perkins:

Sorry.

Marcus Johnson:

Victoria, who edits the show, produces the show, and is experimenting, it seems, with sound effects once the time is up, we're supposed to move on to the next segment. Instead of her screaming at us, she's put on some fun, what was that, an accordion? That was fun.

Victoria:

The title of the track is Ooh-la-la.

Marcus Johnson:

Oh, yeah, I could see. Okay. Yeah. All right, so we should be moving on, but really quickly, yeah, that's what Kevin Roose said in the New York Times Queen, calls six-month problem. After buying a headset, the initial novelty wears off, the minor annoyances creep in, and then six months later it ends up in the back of your closet. So can folks get past that?

The other thing you were saying, not wanting to have to wear it at home, they're not the lightest things in the world, so having the idea of wearing that for long periods of time doesn't sound appealing. You didn't even want to put your regular glasses on for this episode. You came into the episode and had her face pressed up against the camera. Am I too close? So maybe that's a drawback, too. Really quickly, Ross, the main barrier?

Ross Benes:

Nausea and discomfort. I haven't tried this particular headset so maybe it'll blow me away, but whenever I've used VR headsets in the past, using them even as much as an hour, it can make you feel like you're going to vomit. It's a little disorienting, and that's been an issue with VR for a while. So if they can fix that, that'd be a huge step forward, but I think a lot of people are going to struggle with dizziness and nausea.

Marcus Johnson:

Yeah, VR sickness for sure. Bill?

Bill Fisher:

Well, firstly, that music's really cheered me up. Thanks, Victoria. That was great. Yeah, so I don't know, maybe I can be more positive now. What the guys have said, I don't really think there's a killer use case yet. I'm not quite sure what it's for, but these things start as toys, right? And people fork out all this money just to have the latest device, but when Apple joins a market, it tends to push things forward a little bit. So there might be something in there that takes off and then it finds its use case, but I don't know what it is yet.

Marcus Johnson:

Okay, well to that point, Apple pushing a market forward and finding a way to work out, Hope King of Axios writes that this product category isn't going away in her opinion. So really quick, folks, assuming that she's right, what does adoption look like by 2027, adoption out of 10? Obviously these things are going to iterate quite a lot, but do you see them still being niche? Do you see it being half of folks have one, every person? Where do you land out of 10, Carina, in terms of adoption by 2027?

Carina Perkins:

Well, I think our forecast has US VR headset adoption at about 11% of the population in 2027. So I'm going to go for a generous 1.5 out of 10.

Marcus Johnson:

Okay, she's sticking close to the forecast team. Sensible. Ross?

Ross Benes:

I'm going with a four. I think a lot more people will have them in 2027 than ever had them before, but that's only three years from now. I don't see the price dropping to the point where hundreds of millions of people around the world can afford this.

Marcus Johnson:

And has them doesn't translate necessarily into using all the time. A lot of people have smart speakers, but how much they use them is a separate question. Bill?

Bill Fisher:

Oh, I'm quite positive here. I'm going for a four as well.

Carina Perkins:

Globally, are we talking? Globally?

Marcus Johnson:

We can.

Carina Perkins:

Or in the US?

Marcus Johnson:

Let's talk about the UK for you guys.

Bill Fisher:

I'm still going to give it a four. I remember testing VR headsets, I want to say, eight, nine years ago at trade shows when they were quite new, and they were honestly junk back then, and they have come on so much. They really have. I know three years isn't long, but I just think it

needs a few small advancements, and it might pick up a little bit. And Apple's joined a party and as we said, once Apple joins a party, it tends to push things forward.

Marcus Johnson:

We started very negative. You've come a long way, but if I'm honest, it's a bit much. Turn it down. Too much positivity.

Bill Fisher:

Okay, sorry.

Marcus Johnson:

Slow it down. All right, folks, that's what we've got time for the Story of the Week. Let's move to the Debate of the Week. Today's segment, it's called Make the Case.

Where our panel, Ross, Carina, and Bill, present the for and against arguments for each of the following questions based on three news stories. Two contestants face off per question and 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.

We start, of course, with question one. Who's going first? Carina against Bill. Instant AI-generated videos is our first question. OpenAI is launching a new AI-powered video generation tool called Sora, that apparently is sky in Japanese, that can instantly create minute-long movies with complex scenes and multiple characters from just one line of text or a still image. Currently still in the research stage, so not yet publicly available. If you get a chance to look at these, it's quite remarkable and shocking at the same time. But the question is, will instant AI-generated videos be a hit? Carina is going to be arguing instant AI-generated videos will be a hit. A minute on the clock. Carina, make the case.

Carina Perkins:

I guess it depends a little bit on how we define a hit because I do want to caveat this by saying I think they're terrifying, given the potential for deep fakes and impacts on people's jobs. But I think it's inevitable that we're going to see these videos adopted in marketing, advertising, film, TV. They are still very rough around the edges now, and there's some challenges to overcome. I think OpenAI says they don't understand cause and effect yet, so someone could take a bite out of an apple and it would still show the apple as whole, and they lack spatial

awareness. But this technology is moving really fast, and I don't doubt that those will be overcome fairly soon. And this is the worst it's going to look. It's only going to get better from here on in. I just think the potential cost savings are so enormous that content creators aren't going to be able to ignore it. People that aren't using it are going to find themselves at a massive, massive competitive disadvantage.

Marcus Johnson:

Great takes. Bill, you are lucky this isn't a game. Wow. Wouldn't be any point of view even going, but since it's not, Bill, instant AI-generated videos will not be a hit. Make the case.

Bill Fisher:

Okay. Caveat. I think they will eventually. All right, so that should cover my back. Carina's already alluded to this. I think there are too many really significant regulatory and legal issues that come with it, so absolutely, it's incredible. The samples that we've seen Sora produce are honestly incredible. Some of it's crap, though, as well. I saw a floating chair being excavated out of the ground today. But even with guardrails in place, which I know OpenAI is quite strong on, there will be ways to circumvent them. And so, disinformation and more importantly illegal representation will be a huge risk. And where does the responsibility lie? The AI tech owners will have to bear some of the brunt of that. So I think there's still quite a lot to sort out before this thing is fully let loose on the public. So it's not going to be a hit for some time yet.

Marcus Johnson:

Yeah, very nice. Yeah, good comeback. She's still won, but it was some good points. All right, folks, let's move to question two. Carina going up against Ross. Department stores path to relevancy. Our retail briefings analyst Rachel Wolf writes that department stores are facing a slow painful decline, with the US Commerce Department reporting that Q4 sales for department stores fell 4% year-on-year. Rachel points out that Kohl's is facing calls from investors to sell. Macy's is fielding buyout offers. The question is, is there a path to department store relevancy? Carina is arguing there is a path to department store relevancy. Minute on the clock. Make the case.

Carina Perkins:

Okay. This is all also going to be slightly caveated in that they have to do a fair amount to stay relevant. I think we've seen department stores in the UK facing similar struggles and a few big names have gone under. I think part of that is just that they tend to be relatively expensive, and we've seen a big focus on the cost of living. The shopping experience is quite old-fashioned. It can be quite overwhelming. There's kind of too much choice, and their USP was really the convenience of having everything under one roof, but now people can shop online. That's no longer such a differentiator. But that all said, I think they can succeed if they really find a point of differentiation and focus on the kind of experiential elements of retailing and give a bit of theater and also I think have a bit more of their own brand and unique identity, which they often really lack. In the UK, Fenwick has just launched ads for the first time in its 140-year history, which I thought was really interesting.

And finally, I think by forming partnerships with brands that appeal to younger people, because those are the people they really need to get in through the doors, I think we had that Kohl's formed a partnership with Sephora, and I could actually see some real potential synergy between department stores and retailers or brands that don't have their own physical store. So it gives them a space for people who have discovered them on social media perhaps to go and see the products in person, and it will give that department store a kind of hip young audience.

Marcus Johnson:

Very nice. Sorry, there's music.

Carina Perkins:

You failed to recover after that, didn't you?

Marcus Johnson:

Yeah. Yeah. Okay, here we go. Luckily this isn't a professional podcast.

Carina Perkins:

Are we going to keep the music in it? Because I was dancing to it at one point.

Marcus Johnson:

I think so. Yeah, yeah. You basically get your answer in before-

Ross Benes:

We get fair use of that music?

Marcus Johnson:

Yeah, hopefully. V, can you just keep turning it up louder and louder as you just play them off? Ross, there isn't a path to department store relevancy. Make the case.

Ross Benes:

Well, there's only going to be more online shopping as we go into the future. And younger generations shop online more than older do. So when Gen Z becomes the dominant generation of the world, they're going to be really accustomed to online. In-store experience hasn't really evolved enough to appeal to them. And I expect that large e-commerce players like Amazon will continue to get away with murder in how they can treat their workforce and get away with, I wouldn't call it tax fraud, but they have a huge advantage over brick and mortars. They have for years. I expect them to maintain their advantages there, and that will only incentivize more online shopping, but it really depends on what area of retail you're talking about, like car dealerships, grocery stores aren't going to go away. GameStop probably isn't going to exist a whole lot longer.

Carina Perkins:

My thing here, though, is that people do quite like going to the shops, even younger generations, don't they? That's what people do on the weekend, go to the shops.

Ross Benes:

That's a fair point. I was the last that replied to the email.

Carina Perkins:

Yeah, people need things to do on the weekend, I think

Marcus Johnson:

I have some numbers on that. So young people like stores, it seems. 42% of US Gen Z clothing buyers said browsing in store, their top discovery channel, more than brand sites and apps, social media, family and friends, word of mouth. That's according to our September survey. And then Marigold and also retail consulting group Finn, might pronounce that wrong, found

47% of young Gen Z people said they prefer to shop in store over online. That's more than any other generation.

Ross Benes:

Well, that just negates everything I said.

Marcus Johnson:

Yeah, sorry, Ross.

Carina Perkins:

Sorry, Ross.

Marcus Johnson:

Was anyone else, though, watching the clock, just hoping it got to zero so we could hear the music again? I was half paying attention to what you said, Ross. You might have said all that stuff I just said.

Ross Benes:

It's hard for me to go longer than a minute.

Marcus Johnson:

Well, try harder next time. The music's brilliant. Let's go to Ross versus Bill for question three. Are folks ready for shoppable media? Our senior retail analyst, Blake Droesch just wrote a piece about whether the success of social commerce will spread to other channels. He notes that shoppable media formats are becoming available across different media, from CTV ads with QR codes, to live stream shopping, to online recipes that include links to purchase sites. All of these are types of shoppable media. But Blake questions whether consumers will want to buy products via media that they consume. Ross is going to argue folks are ready for shoppable media. Make the case.

Ross Benes:

Well, Amazon's getting into television in a huge way with all the live sports they're doing and inserting ads into Prime Video. And as they become a bigger TV player, they're going to get the consumer ready for shoppable media. I'm not suggesting that people are going to be in

love with shoppable ads, but they're going to be really accustomed to them because they're going to be seeing them more often than they ever have before. They've been getting them on their phones and on their desktop already, but it's come into these other media formats, like audio and video, to a degree that it hadn't been there before.

Marcus Johnson:

Okay, Bill.

Bill Fisher:

That was quick.

Marcus Johnson:

You are arguing... Yeah, folks, too quick. Talked about this, Ross. Bill, folks aren't ready-

Ross Benes:

You can give me a 30-second timer.

Marcus Johnson:

... for shoppable media. Make the case.

Bill Fisher:

Okay, Gartner says so. That's why. So in its latest hype cycle, shoppable media currently sits in the trough of disillusionment. For those of you don't know the Gartner hype cycle, it drills down into the five key phases of a technology's lifecycle. The trough of disillusionment sits right in the middle and in its words, that's when interest wanes and experiments and implementations fail to deliver. Producers of the technology shake out or fail. Investments continue only if the surviving providers improve their products to the satisfaction of early adopters. And that's the problem. There's no, to my mind, mass improvement in this tech across providers. So consumers aren't seeing consistently good experiences, so interest is going to wane. It's a bit of a chicken and egg scenario. You need the tech to build the interest, but they'll only build the tech if there's enough interest. But essentially, it's up to the commerce and media providers to build better connected experiences, and that hasn't happened yet. So that's why there's consumer apathy.

Marcus Johnson:

Keep going. Keep talking. There it is.

Well-played. Okay. Well, yeah, it depends who you ask, it seems. That's really interesting. But industry folks, ad folks, nearly six in 10 ad agency folks think shoppable video content will be the next frontier according to June Research. The Path to Purchase Institute, in terms of how many people are shoppable media folks, there's quite a lot, but little growth coming down the road. Our forecast team thinks 44% of digital buyers will be shoppable media people this year. But in a few years time, that share barely budges.

I wonder if shoppable is the problem, and we should focus more on the interactive portion. Because according to our survey, after discovering a new brand or product from a CTV ad, most folks will first Google it and then check it out in store, 38% each. Then they'll do a whole bunch of other stuff before you get all the way to the bottom of the list, which is less than 4% of people saying they'd buy it right away. So I wonder if shoppable media should just be interactive media and shouldn't focus so much on driving sales, but driving engagement, so discount codes, free trials, booking test drives. What do we think?

Ross Benes:

Well, those ads are going to be more shoppable if you're doing a direct response sort of thing. The types of TV ads you used to see where it's like 1-800, call this number and you're going to get this product Billy Mays is selling. That's very shoppable. When you're just branding something, like Nissan has a new automobile, I just want you to be aware of it and show how sexy our brand is, you're not going to just chuck that into your Amazon cart. That's just more for generating awareness.

Carina Perkins:

It depends on the categories, right? If it's a kind of impulse purchase, then that's infinitely more shoppable than a car.

Marcus Johnson:

Yeah, I wonder if Starbucks had a TV ad and if you got to the screen in time and scanned the QR code, you got a free drink, something where it's engagement. It's not necessarily shoppable, but interactive.

Carina Perkins:

I think it would work if you could get one delivered to your house within half an hour. You look at something, you see an ad, and you're like, oh, I really fancy one of those, and it's there. For a drink, I can see that working, kind of quick commerce type thing.

Marcus Johnson:

Interesting.

Bill Fisher:

I think it's dependent on the media as well. So this is where TikTok comes into play. Again, I have to talk about TikTok at least once every podcast.

Ross Benes:

Are they paying you, Bill?

Marcus Johnson:

They bloody well better be, given how he talks about it.

Bill Fisher:

This is the type of media where, it's the way I use it, though, I use it different from my kids, and I look at how-to videos and things like that. I can't do DIY. So I have all this DIY stuff coming at me. And if I see something that's really useful, I buy it. Well, I don't actually, but I would. I might be persuaded to if it was shoppable.

Marcus Johnson:

Okay, that's where we leave the Debate of the Week, folks. Great arguments. We move now though to Dinner Party Data. It's the part of the show where we tell you about the most interesting thing we've learned this week. Let's start with Ross.

Ross Benes:

So this holiday weekend, I was looking to walk around with my daughter, but it was cold outside and the library was closed. So drove to Nyack, New York and walked around the Palisades Mall. And I was like, this is a huge mall. I'm very tired. I've been walking around for hours, and I didn't even see the whole thing. So I wanted to see where does that stack up

compared to the rest of the malls in the United States? And I learned from a Business Insider article that it's the 12th largest mall with about 2 million square feet of retail space.

And the top mall, you're probably not going to be surprised, is the Mall of America in Minnesota. That has over 5 million square feet of retail space. And the second is the American Dream Mall that opened recently in New Jersey. It's way smaller than the Mall of America, but significantly bigger than the mall I went to. It's about 3 million square feet of retail space. So what I'm saying is America has some really huge malls. They have at least a dozen malls at over 2 million square feet. They will take the life out of you if you spend all day in them.

Got to the music just like you wanted, Marcus.

Marcus Johnson:

Thank you. Number three on the list is One Chicago. Number four, we have-

Carina Perkins:

How does it compare to Westfield, do you think? That's our biggest one, isn't it?

Ross Benes:

I don't know because I only looked at, I was American-centric here.

Carina Perkins:

It won't be anywhere near that big.

Marcus Johnson:

Wait. Carina do some live research. We'll go to Bill next. Maybe you can tell us in a few minutes time. That's a great question, though, because isn't Westfield, it was the biggest mall. So there's two in London, right, West and East?

Carina Perkins:

Yeah.

Marcus Johnson:

I believe. Yeah, I don't think there's any more. And one of them, I think it's the one in the east that they built kind in part because of the Olympics, but I think that's the biggest in Europe for

a while. So it's big. But yeah, how it stacks up against the US, I'm not sure. Bill, do you want to go? Oh, you've got it already?

Carina Perkins:

Westfield London is Europe's largest shopping and leisure destination at 242,000 square meters.

Marcus Johnson:

Okay, so just a little bit smaller. Fair enough.

Ross Benes:

But I was talking feet, though.

Carina Perkins:

That's a bit embarrassing, isn't it? You're feet? Oh god, no.

Ross Benes:

So feet that would be like between seven and 800,000 square feet, I think.

Carina Perkins:

Still pretty small, isn't it?

Ross Benes:

Yeah, that's smaller than the mall I went to yesterday.

Marcus Johnson:

And that one's chaos. Westfield is a disaster. And it's also multiple floors, right, in the US?

Ross Benes:

Once you get beyond 100,000 square meters of retail space, I think you have enough.

Marcus Johnson:

Probably as much as you need. Bill?

Bill Fisher:

Okay, so given we've been talking about VR and digital video, I'm going to have a fact that covers both. Do you remember the early 90s movie, The Lawnmower Man? One of your favorites, right?

Marcus Johnson:

Never saw it. Never saw it. With Jim Carrey?

Bill Fisher:

No.

Marcus Johnson:

It's not Jim Carrey?

Bill Fisher:

I don't think so. Pierce Brosnan's in it.

Marcus Johnson:

Am I think of the Cable Guy?

Bill Fisher:

Maybe.

Marcus Johnson:

Nevermind. I haven't seen the film, which is evident from my response.

Bill Fisher:

This was a movie that told us the perils of virtual reality. It was based loosely on a Stephen King novel. Anyway, the CGI used in that movie only accounted for eight minutes of screen time, and it cost half a million dollars. At the time, that was quite a lot of money, certainly for such a small amount of footage. Of course, generative AI could probably knock that up in a matter of minutes nowadays with a much, much smaller price tag.

Marcus Johnson:

Eight minutes?

Bill Fisher:

It was a terrible film, I should say.

Marcus Johnson:

38% on Rotten Tomatoes, if you believe in that. It's because Jim Carrey wasn't in it. That's why.

Carina Perkins:

Because Pierce Brosnan was in it, probably.

Marcus Johnson:

Oh, shots fired. Oh, Pierce, I'm sorry.

Bill Fisher:

Pierce Brosnan, incidentally, there was a sequel, which was even worse than the first. And Pierce Brosnan couldn't do it because he was doing his first Bond, I think. So I think he made the right choice.

Marcus Johnson:

Goldeneye?

Bill Fisher:

Yes.

Marcus Johnson:

So good. Yeah. But wait, there's a Lawnmower Man Two?

Bill Fisher:

Yep.

Marcus Johnson:

There doesn't need to be, does it? I haven't even seen the first one, but-

Ross Benes:

You're talking about Lawnmower Man Two?

Marcus Johnson:

You've seen the film.

Ross Benes:

Yeah, I have seen both Lawnmower Mans.

Marcus Johnson:

Lawnmower Men?

Ross Benes:

Yeah.

Marcus Johnson:

Thoughts.

Ross Benes:

That's what we're talking about, right?

Marcus Johnson:

Unfortunately, yes. That is where we've landed.

Ross Benes:

The second one really did a lot worse than the first one. And the villain's whole goal is to take over the world and be the only thing left in cyberspace, right?

Marcus Johnson:

Lawnmower Man? It's about a guy in the suburbs.

Carina Perkins:

Not quite The Shining, is it?

Marcus Johnson:

No. All right. Who's next? Is that everyone?

Carina Perkins:

No, me.

Marcus Johnson:

Carina. Sorry. Sorry. Because you did the mall thing but you were helping out with-

Carina Perkins:

Sorry, adding on.

Marcus Johnson:

Sorry. Go on.

Carina Perkins:

Okay, so it's a leap year, which means we get an extra day, so I found lots of other things that happen in a day. The world population will grow by 200,000 people. More than 41 million trees will be cut down. We'll all laugh 15 times. We'll kiss on average three times, exchanging 30 million bacteria. Our hearts will beat around 100,000 times. A mayfly will live its entire life. Our blood will travel 168 million miles, and our kidneys will filter 3000 pints of blood. Cats will sleep 17 hours. Sheep around the world will yield 5,000 tons of wool. Hens will lay nearly 2 billion eggs. Over 4 million tons of rubbish will be thrown out. And the really key one here, 900,000 golf balls will be sold.

Marcus Johnson:

I thought you were going to end with, "And a partridge in a pear tree." That was really good. What was your favorite one? The bacteria one was rough.

Carina Perkins:

Yeah, that was a rough one. I thought 41 million trees was sad.

Marcus Johnson:

Yeah. That's terrible. 200,000 people, new people?

Carina Perkins:

New people. Yeah.

Marcus Johnson:

That's too many. Yeah. Feel like the planet's full. All right.

Carina Perkins:

There you go. Extra day. That's what we get.

Ross Benes:

All right. Happy weekend, everyone.

Carina Perkins:

Enjoy your golf balls.

Marcus Johnson:

All right, I got one for you real quick. Marital status in the US. Couldn't find any UK numbers. If the UK folks know how to pull some up quickly. Maybe I should have done that. I would have seen how this compares. But anyway, let's have a look. America, over half of Americans are not married. Not as surprised as I was when I read that. Fair enough. V, if you can cut in a...

51% of Americans are married, then the other half are divided into 34% have never been married, 10% divorced, and 5% widowed, which is heartbreaking. Women are widowed at 2.5 times the rate. Men, I think 4% of all men widowed, 11% of women. Yeah because they live a lot longer.

And my friend was like, "I feel like I'm getting close to middle age." And I was like, "Mate, I think you're way past it. You're expecting to live a lot longer than the average." And he was like, "All right, maybe I am close to it. Maybe I'm hoping to live to 79, 70." I was like, "You are also not a woman." So men just keep going down. He's probably got about a few years left, if I'm honest. Harsh reality, but he had to know it. Carina, sorry. Yep.

Carina Perkins:

46.9% of people in England, Wales were married in 2021. And that's down from 49.4% in 2011, over a decade. And 37.9% of people in 2021 have never been married.

Marcus Johnson:

37. Okay. Okay. So a few points higher on the marriage, few points lower on the never-been. Okay. Interesting. Well, the marriage rate is falling in the US. Back in 1980, 6% of Americans age 40 and up had never been married. 6%, 40 and up, never been married. Today, 25%, according to Pew Research, so that's four times higher, and folks waiting longer to get married. From 1982 to today, the share of adults who were married by age 25 has plummeted from 66% of people being married by age 25 in 1980 to 22% today. Over that time, the average age of marriage has gone from 23 to people getting married on average closer to 29 today.

That's all we've got time for this episode. Thank you so much to everyone for hanging out today. Thank you to my guest. Thank you to Bill.

Bill Fisher:

Thanks for having me.

Marcus Johnson:

Of course. Turned out to be a pleasure. Wasn't so sure in the beginning. Thank you to Ross.

Ross Benes:

Thanks Marcus.

Marcus Johnson:

Thank you. Of course, to Carina.

Carina Perkins:

Thanks, Marcus.

Marcus Johnson:

And thank you to Victoria who edits the show, James who copyedits, Stuart who runs the team, Sophie who does our social media, and Lance who runs our video podcast. Thank you to everyone for listening in. Come hang out with us on Monday, if you want, you don't have to, for the Behind the Numbers Daily, an eMarketer Podcast, made possible by StackAdapt. Happy weekends.